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**Jenzabar CX**

# **Financial Aid Loan**



**JENZABAR**

**User Guide**

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Filename: ugfaloo

Distribution date: 09/20/2000

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JENZABAR, INC.  
FINANCIAL AID LOAN USER GUIDE

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# SECTION 1 - GETTING STARTED

## Overview

### Introduction

Financial Aid Loan is an application developed by Jenzabar, Inc. that allows you to create, update, and track students' financial aid loan information.

CX users process financial aid loan information using CX software, then use third party software to send and receive loan information to and from the service provider.

### Product Differences

This guide contains information for using all features developed for the Financial Aid Loan product. Your institution may or may not have all the features documented in this guide.

### Purpose of This Guide

This guide serves as a learning tool and a reference guide for adding, updating, and posting students' financial aid loan information.

### Intended Audience

This guide is for menu users in the Financial Aid, Business, or Student Billing offices who perform data entry operations. Menu users include the application coordinator, administrative assistants, and operators.

### Learning Objectives

Using this guide, you will be able to:

- Add and update Federal Family Education Loan Program (FFELP)
- Add and update Federal Direct Student Loan Program (FDSLPL)
- Track loan status information
- Track loan history information
- Post student loan information to CX Student Billing
- Create disbursement schedules
- Certify correct information on loan applications
- Electronically submit loan applications to the funding (origination) agency
- Electronically import loan application information from the funding (origination) agency

### How to Use This Guide

If you are not familiar with how your institution maintains its financial aid loan information, read this guide for detailed information about how to use Financial Aid Loan.

If you are familiar with how your institution maintains this information and need information in a particular area of CX, review the table of contents or index, then refer to the pages you need.

### Structure of Jenzabar CX User Guides

Jenzabar CX user guides contain the following sections:

- Section 1 - An overview of general information
- Section 2 - A reference of the screens, fields, and commands for the application
- Sections 3 - 9 - Detailed procedures for using the application
- Section 10 - A procedure for producing reports and report reference information
- Section 11 - A reference of application error and warning messages

- Index

## Other Information Resources

### Introduction

This user guide contains information about the screens, options, and procedures specific to Financial Aid Loan. However, some of these may be used in other CX applications. Documentation for these common features appears in the manuals or guides to which they most specifically relate.

### Resource List

The following provides references to other CX documentation for certain functions, screens, and options that are not described in this user guide.

<b><i>For more information about:</i></b>	<b><i>See:</i></b>
Common windows	<i>Getting Started User Guide</i>
Communications Management	<i>Communications Management User Guide</i>
Detail windows	<i>Getting Started User Guide</i>
CX menus	<i>Getting Started User Guide</i>
CX universal commands: Help ID-type Query Scroll Table Lookup	<i>Getting Started User Guide</i>
Electronic Data Exchange (EDE) for Financial Aid	<i>Financial Aid Electronic Data Exchange (EDE) User Guide</i>
Financial Aid Packaging	<i>Financial Aid Packaging User Guide</i>
Financial Aid Pell Grant processing	<i>Financial Aid Electronic Data Exchange (EDE) User Guide</i>
Financial Aid Reports	<i>Financial Aid Technical Manual</i>
Financial Aid screen flow diagram	<i>Financial Aid Technical Manual</i>
Financial Aid Tables and table maintenance	<i>Financial Aid Technical Manual</i>
General screens and procedures for Financial Aid	<i>Financial Aid User Guide</i>
PERFORM screens: Common commands General description Ring menus	<i>Getting Started User Guide</i>
Program screens: Common commands General description Toolbars	<i>Getting Started User Guide</i>
Query tools	<i>Getting Started User Guide</i>
QuickMate	<i>QuickMate Installation Guide</i> and QuickMate online help
Reporting tools	<i>Getting Started User Guide</i>
Terminology	<i>Master Glossary</i>

## **Menus and Menu Options**

Menus are not illustrated in CX documentation because they may have been modified by your institution. For information about what menus you can access, as well as the menu options available from them, refer to the section, *Using the Menus*, in the *Getting Started User Guide*.

# Before You Begin Financial Aid Loan

## Introduction

This section provides the following:

- The purpose of Financial Aid Loan
- A checklist of information you need to know and tasks you need to perform before using Financial Aid Loan
- Background knowledge you must possess to use Financial Aid Loan
- A summary of the Financial Aid Loan process

## Purpose of Financial Aid Loan

The primary purpose of Financial Aid Loan is to enable you to track financial aid loans for both the FFELP (Federal Family Educational Loan Program) and Direct Lending interfaces. The FFELP Loan interface is designed to be “CommonLine Compliant” and uses current interface specifications to user selected third party software.

The Direct Lending interface is designed to allow a “combination” interface, which requires the use of the federally-provided EDEXpress loan tracking software.

## Prerequisite Tasks

Use the following checklist to ensure that you have reviewed all required tasks before you begin using Financial Aid Loan:

- Identify the specific sessions for which you are entering Financial Aid Loan information
- Identify the Financial Aid codes that Financial Aid Loan will track
- Modify the loan tracking tables for your institution’s specific values
- Create entries on the Loan Tracking Lender table

**Note:** For more information on the Financial Aid Loan tables, see the *Financial Aid Technical Manual*.

## Background Knowledge

This list describes the necessary background information that you should know.

### Authorized personnel

Know answers to the following questions:

- Who is authorized to change financial aid loan information?
- Who is authorized to access online financial aid loan information?

### Important dates

Know when the following occur:

- Refund periods
- Withdrawal dates
- When the Business office posts aid to students’ accounts
- When Automatic Recalculation ceases to occur

**Note:** Ensure that the CX Registration and Fiscal/Financial applications have been set up so the fiscal and academic calendars include the sessions for which you are awarding aid. Ensure that all offices use the same values for sessions (e.g., FA for fall, SP for spring, SU for summer).

### Financial aid policies and procedures

Know answers to the following questions:

- Which office at your institution is in charge of handling student accounts? (Contact this office when you have questions about which codes to apply to courses requiring special fees.)
- Does your institution register graduate students in undergraduate courses or register undergraduates in graduate courses?

## Reporting Tools

Jenzabar provides several solutions to serve the Financial Aid application reporting needs. In addition to standard reports located on the Table Maintenance menu, your institution can choose from a variety of reporting tools. The reporting tools are as follows:

### ACE Reports

The standard reports located in the CX menu system. You can access and run ACE reports from the menus to which they relate. For example, standard financial aid loan reports appear on the Loan Tracking: Reports menu.

The initial screen, which appears when you select a report, prompts you to enter any required parameters for producing it. Once you have entered these, you can send the output to the screen or to a file, print the report immediately, or schedule it to be produced at a later time.

**Note:** For more information on running ACE reports, see *Producing Standard and Customized Reports* in the *Getting Started User Guide*.

### Impromptu®

A PC/Windows-based reporting tool intended for technical users. Using Impromptu and the Jenzabar CX ODBC driver, you can access CX data to produce reports. Impromptu organizes reporting information in *catalogs*. Jenzabar has created catalogs for Admissions, Financials, Financial Aid, Institutional Advancement, and Registration.

**Note:** For more information on using Impromptu, see the online help provided with the product.

### IQ®

A UNIX/character-based reporting tool created by IQ Software Corporation. Using IQ, you can access CX data to produce reports. IQ organizes reporting information in *categories/views*. Jenzabar created the Financial Aid views to serve the reporting needs of financial aid.

**Note:** For more information on using IQ, see the following:

- *Producing Standard and Customized Reports* in the *Getting Started User Guide*
- *Intelligent Query® Users Guide* (Jenzabar distributes this guide provided by the IQ Software Corporation)

### PowerPlay®

A PC/Windows-based executive and management data analysis tool. Using static data files downloaded from CX, you can use PowerPlay to display and analyze data in a graphical, multilevel, drill-down structure.

**Note:** For more information on using PowerPlay, see the online help provided with the product.

## Financial Aid Loan Process

This list describes the overall process involved in using Financial Aid Loan.

**Note:** The process shown below is an example and is not intended as policy guidance. Your institution's Financial Aid Loan process may vary.

1. The Admissions office/Registration office enters student ID numbers and other enrollment information.
2. The Financial Aid office determines need, amount, and type of financial aid for each student.
3. The Financial Aid office creates a loan application.
4. The Financial Aid office creates a loan disbursement schedule.
5. The Financial Aid office certifies that the student's loan information is correct.
6. The Financial Aid office exports loan records to the funding (origination) agency for authorization.
7. The Financial Aid office imports loan records from the funding (origination) agency.
8. The Financial Aid office tracks the history of all financial aid loans for each student.

# Conventions Used in This Guide

## Introduction

Jenzabar has established a set of conventions to help you use this guide. The conventions presented below are not exhaustive, but they include the more frequently used styles and terms.

## Style Conventions

CX guides observe the following style conventions.

### **Boldface type**

Represents text that you type into the system (e.g., Type **UNDG**), command names (e.g., **Finish**), or keys you use to execute a command or function (e.g., **<Enter>**).

### **Bulleted lists**

Show items not ranked or without a sequential performance.

### **CAUTION:**

Indicates a caution or warning of a potential risk or condition.

### **<Enter>**

Represents the Enter, Return, Line Feed, or ↵ key on your keyboard.

### **Italic type**

Is used in any of these ways:

- To represent a new or key term
- To add emphasis to a word
- To reference another manual or a section within this guide
- To represent a variable for which you substitute another variable (e.g., substitute *filename* with an appropriate filename)

### **<Key name>**

Represents a key that you must press.

### **Note:**

Indicates a note, tip, hint, or additional information.

### **Numbered lists**

Show ranking of items or sequence of performance.

### **Parentheses**

When used around a field name, indicate the field is unlabeled. The field description includes the location of the field.

### **Quotation marks**

Represent information written in this guide exactly as it appears on the screen (e.g., The message, "Now Running..." appears).

## Jenzabar-Specific Terms

Some terms used in this guide may be unfamiliar to you, either because they are terms you have not used before or because Jenzabar has assigned a slightly different meaning to a familiar term. The following list identifies and explains the most common Jenzabar-specific terms:

### **Application**

One or more software programs that enable you to perform a particular procedure (e.g., registering students).

### **Data**

Specific information you enter into fields on a particular data entry screen.

**Enter**

To type information on a keyboard and execute by doing one of the following actions:

- Pressing the **<Enter>** key
- Clicking on the **OK** button
- Selecting **Finish**

**F key**

Any of the function keys located on your keyboard (e.g., **<F1>**).

**Hot key**

The capitalized and highlighted letter of a command on a command line, menu bar, or ring menu.

**ID**

The number assigned to each student or organization associated with your institution (e.g., 12345).

**Parameter**

A variable in the system that is given a constant value for a specific application (e.g., a date can be a parameter for producing a report).

**Select**

To execute a command by any of the following actions:

- Performing the keystrokes
- Pressing the hot key
- Highlighting the command or option and pressing **<Enter>**
- Clicking the mouse

**System**

The Jenzabar product, CX.

**Keystrokes**

When you see two keys separated by a dash (e.g., **<Ctrl-c>**), hold down the first key (**<Ctrl>**) while pressing the second (**<c>**).



## SECTION 2 - USING THE FINANCIAL AID LOAN SCREENS

### Overview

#### Introduction

This section shows each screen and window you use in Financial Aid Loan and provides explanations for each of their fields. This section also provides a reference of the commands and options you use to perform procedures in Financial Aid Loan.

Refer to this section when you have questions about a specific field or command, or when you are performing procedures associated with Financial Aid Loan.

#### Organization

The screens, windows, fields, and commands are listed in alphabetical order (unless otherwise noted) so you can locate the information quickly.

#### Screen Access

Access instructions for screens presume you are starting at the Financial Aid Main menu unless otherwise noted.

#### Screen Differences

The screen and window examples in this section represent those contained in the CX standard product in GUI format unless otherwise noted. Screen examples show question marks (?) for the Table Lookup option where space permits. If your institution changes these screens and windows to meet its specific needs, yours will differ from those shown in this section. Your screens and windows will also look different if you use CX in character-based format.

# Alternate Loans Screens

## Purpose

The Alternate Loans screens consist of two screens that enable you to add, update, and certify KEY Alternative loans that have been awarded to a specific student.

## Access

Access the Alternate Loans screens by selecting the following, beginning at the Student Management: Financial Aid Main menu:

1. Loan Tracking.
2. Loan Tracking Entry.
3. Enter parameters.
4. **Finish.**
5. Enter the desired student ID or social security number in the ID field, or perform a query to find the student.
6. **Finish.**
7. Select **Alternate** from the Commands menu.

**Note:** To access the Alternate Loans screen (2 of 2), select **Screen** from the Commands menu at the Alternate Loans screen (1 of 2)

## Example (1 of 2)

Following is an example of the Alternate Loans screen (1 of 2).

The screenshot shows a window titled "Loan Tracking Entry - Loan Tracking" with a menu bar (File, Edit, Commands, Help) and a toolbar with icons for search, back, forward, and refresh. The main area displays the following information:

ALTERNATE LOANS

ID: 5061480 Young, Rick A. SSN: 506-85-5421 Cur: 1  
Prog: UMDG Major: ACC Acst: ACPT Start: FA 2000 Grad: SP 2003 Num: 1

Originator... KEY Key Alternate Loans UniqID.. 9999990000U8ES003  
Aid Year.... 0001 Period.. 3Q FALL 00 - SPR-SUM 01  
Loan Type.... KY Key Alternate Loan BegEnd.. 03/03/2000 - 07/15/2001  
Grade Level.. FR Freshman Certify.

BORROWER BORROWER CONT'D

ID/SSN..... 5061480 506-85-5421 Anticipated Graduation.... 05/05/2004  
Last Name..... Young Recent Cumulative GPA..... 0.0  
First/Middle.. Rick A Academic Period..... S  
Addr1..... 4000 Executive Park Dr. Enrollment Status..... F  
Addr2..... Outstanding Educ Loans.... 0.00  
City..... Cincinnati LOAN  
State/Zip..... OH 45241 0000 Loan Amount Requested.... 250.00  
Phone/DOB.... 513-456-6521 01/01/1980 Origination Fee Percent... 1.100  
Driver's Lic.. CA 121212121 Signed/Date..... Y 04/18/2000  
Citz/Alien No. 1 Status/Date..... E 04/18/2000

## Segments (1 of 2)

The Alternate Loans screen (1 of 2) is divided into three segments:

- The Header segment provides ID information about the selected student.
- The Upper segment provides Alternate Loan information about the selected student.

- The Lower segment provides specific information about the borrower and the loan status.

### Fields on the Header Segment (1 of 2)

The following fields appear on the Header segment of the Alternate Loans screen (1 of 2).

**Note:** The system maintains all fields, which are display-only.

#### ACST

A code identifying the student's current academic status. Valid codes are:

- Blank (No academic status yet)
- ACPT (Full acceptance)
- ALOA (Academic leave of absence)
- CANC (Student cancelled registration)
- CD (Conditional acceptance)
- FULL (Fully admitted/enrolled)
- GRAD (Graduate student)
- PB (Academic probation)
- VW (Voluntary withdrawal)

#### Cur

The current loan being viewed (e.g., 1 for first).

#### Grad

The session and year the student plans to graduate (e.g., SP 2003).

#### ID

The number used to identify the student in the CX database (e.g., 5061480). The student's name appears to the right in last, first, middle format (e.g., Young, Rick A.).

#### Major

A code identifying the student's intended major (e.g., ACC for Accounting).

#### Num

The total number of alternate loans listed for this student (e.g., 1).

#### Prog

A code identifying the academic program for which you want to process loan information (e.g., UNDG for Undergraduate).

#### SSN

The student's social security number (e.g., 506-85-5421).

#### Start

The beginning session and year for which the student is enrolled (e.g., FA 2000).

### Fields on the Upper Segment (1 of 2)

The following fields appear on the upper segment of the Alternate Loans screen (1 of 2).

#### Aid Year

Required - the financial aid award year in which the loan period begins (e.g., 0001 for 2000-2001). Use **Table Lookup** for list of valid values.

#### BegEnd

Required - the financial aid loan period beginning date and ending date (e.g., 03/03/2000-07/15/2000).

#### Certify

Display only - the date (mm/dd/yyyy) the Alternate loan is certified by the financial aid office.

#### Grade Level

Required - a code indicating the student's grade level (e.g., FR for Freshman). A description of the grade level appears to the right. Use **Table Lookup** for a list of valid values.

**Loan Type**

Required - a code indicating the type of loan requested (e.g., KY for Key Alternate Loan). A description of the loan type appears to the right. Use **Table Lookup** for a list of valid values.

**Originator**

Required - a code indicating whether the loan service provider is CommonLine (COMMON), Direct Lending (DIRECT), or Key Alternate Loans (KEY). The description of the service provider appears to the right. Use **Table Lookup** for a list of valid values.

**Period**

Required - a code indicating the beginning and ending session of the loan period (e.g., 3Q Fall 2000 to Spring-Summer 2000). Use **Table Lookup** for a list of valid values.

**UniqID**

Display only - a unique number, created by CX, to send to the service provider of the loan (e.g., 9999990000U8ES003).

**Fields on the Lower Segment (1 of 2)**

The following fields appear on the lower segment of the Alternate Loans screen (1 of 2).

**Academic Period**

Optional - a code identifying the school's academic year. Valid options are Q (Quarters) or S (Semesters).

**Addr1**

Optional - the street name and number of the borrower's permanent address (e.g., 4000 Executive Park Dr.). This is the first of two address lines.

**Addr2**

Optional - the second address line of the borrower's permanent address.

**Anticipated Graduation**

Optional - the anticipated date (mm/dd/yyyy) of the student's graduation.

**City**

Optional - the city of the borrower's permanent address (e.g., Cincinnati).

**Citz/Alien No.**

Optional - consists of two fields. The first field is a code indicating the citizenship of the borrower (e.g., 1 for U.S. citizen). A list of valid codes appears in the Comment line. The second field is the nine-digit alien registration number and is only used if the borrower is other than a US citizen or US national.

**Driver's Lic**

Optional - consists of two fields. The first field is the State code for the state in which the borrower has a drivers' license (e.g., CA for California). Use **Table Lookup** for a list of valid codes. The second field is the borrower's drivers' license number (e.g., 12121212).

**Enrollment Status**

Optional - a code indicating the student's enrollment status (e.g., F for full time enrollment). Use **Table Lookup** for a list of valid codes.

**First/Middle**

Optional - the borrower's first name (e.g., Rick) and middle initial (e.g., A).

**ID/SSN**

Optional - the borrower's ID number (e.g., 5061480) and social security number (e.g., 506-85-5421).

**Last Name**

Optional - the borrower's last name (e.g., Young).

**Loan Amount Requested**

Optional - the gross amount requested for the financial aid loan (e.g., 250.00).

**Origination Fee Percent**

Optional - the percentage charged by the service provider for the financial aid loan (e.g., 1.100).

**Outstanding Educ Loans**

Optional - the total amount of the borrower's outstanding educational loan debt from prior years.

**Phone/DOB**

Optional - consists of two fields. The first field is the borrower's phone number (e.g., 513-456-6521). The second field is the borrower's date of birth (e.g., 01/01/1980).

**Recent Cumulative GPA**

Optional - the student's most recent cumulative GPA. This value is 0 for first time freshmen.

**Signed/Date**

Optional - Y (Yes) or N (No) indicating whether the borrower has signed the financial aid loan application. The date (mm/dd/yyyy) of the signed loan application appears to the right if the response is Y.

**State/Zip**

Optional - a code indicating the state of the borrower's permanent address (e.g., OH for Ohio) and the zip code of the borrower's permanent address (e.g., 45241 0000).

**Status/Date**

Optional - a code indicating the status of the loan application (e.g., E for Entered). The date (mm/dd/yyyy) of the current loan status appears to the right. Use **Table Lookup** for a list of valid codes. For a detailed definition of the loan status codes, see *Loan Status Codes* and *Disbursement Status Codes* at the end of this section.

**Example (2 of 2)**

Following is an example of the Alternate Loans screen (2 of 2).

Loan Tracking Entry - ID Query			
File Edit Commands Help			
			ALTERNATE LOANS
<b>ID:</b>	5061480 Young, Rick A.	<b>SSN:</b> 506-85-5421	<b>Cur:</b> 1
<b>Prog:</b>	UNDC <b>Major:</b> ACC <b>Acst:</b> ACPT <b>Start:</b> FA 2000	<b>Grad:</b> SP 2003	<b>Num:</b> 1
Originator...	KEY Key Alternate Loans	UniqID..	9999990000US8S003
Aid Year.....	0001	Period..	3Q FALL 00 - SPR-SUM 01
Loan Type....	KY Key Alternate Loan	BegEnd..	03/03/2000 - 07/15/2001
Grade Level..	FR Freshman	Certify.	
COSIGNER		COSIGNER'S EMPLOYER	
ID/SSN.....	15929 398-97-0564	Name.....	Young and Assoc. Inc.
Last Name....	Young	Addr1.....	4000 Executive Park Dr.
First/Middle..	Carolyn G	Addr2.....	
Addr1.....	105 Bellevue	City.....	Cincinnati
Addr2.....		State/Zip....	OH 45241 1111 Y/M: 10 6
City.....	Lexington	Position.....	Vice President of Mktg.
State/Zip....	KY 40503 0000 Y/M: 15 6	Phone.....	513-587-6222
Phone/DOB....	606-269-8797 11/24/1960	Monthly Gross.	\$5,420.00
Driver's Lic..	KY KY7802350SD21	Other Name....	
Citz/Alien No.	1	Signed/Date...	Y 04/18/2000

## Segments (2 of 2)

The Alternate Loans screen (2 of 2) is divided into three segments:

- The header segment provides ID information about the selected student.
- The upper segment provides Alternate Loan information about the selected student.
- The cosigner segment provides address, identification, and employment information about the cosigner for the current financial aid Alternate Loan record.

## Fields on the Header Segment (2 of 2)

The following fields appear on the header segment of the Alternate Loans screen (2 of 2).

**Note:** The system maintains all fields, which are display-only.

### ACST

A code identifying the student's current academic status. Valid codes are:

- Blank (No academic status yet)
- ACPT (Full acceptance)
- ALOA (Academic leave of absence)
- CANC (Student cancelled registration)
- CD (Conditional acceptance)
- FULL (Fully admitted/enrolled)
- GRAD (Graduate student)
- PB (Academic probation)
- VW (Voluntary withdrawal)

### Cur

The current loan being viewed (e.g., 1 for first).

### Grad

The session and year the student plans to graduate (e.g., SP 2003).

### ID

The number used to identify the student in the CX database (e.g., 5061480). The student's name appears to the right in last, first, middle format (e.g., Young, Rick A.).

**Major**

A code identifying the student's intended major (e.g., ACC for Accounting).

**Num**

The total number of alternate loans listed for this student (e.g., 1).

**Prog**

A code identifying the academic program for which you want to process loan information (e.g., UNDG for Undergraduate).

**SSN**

The student's social security number (e.g., 506-85-5421).

**Start**

The beginning session and year for which the student is enrolled (e.g., FA 2000).

**Fields on the Upper Segment (2 of 2)**

The following fields appear on the upper segment of the Alternate Loans screen (2 of 2).

**Aid Year**

Required - the financial aid award year in which the loan period begins (e.g., 0001 for 2000-2001). Use **Table Lookup** for list of valid values.

**BegEnd**

Required - the financial aid loan period beginning date and ending date (e.g., 03/03/2000-07/15/2000).

**Certify**

Display only - the date (mm/dd/yyyy) the Alternate loan is certified by the financial aid office.

**Grade Level**

Required - a code indicating the student's grade level (e.g., FR for Freshman). A description of the grade level appears to the right. Use **Table Lookup** for a list of valid values.

**Loan Type**

Required - a code indicating the type of loan requested (e.g., KY for Key Alternate Loan). A description of the loan type appears to the right. Use **Table Lookup** for a list of valid values.

**Originator**

Required - a code indicating whether the loan service provider is CommonLine (COMMON), Direct Lending (DIRECT), or Key Alternate Loans (KEY). The description of the service provider appears to the right. Use **Table Lookup** for a list of valid values.

**Period**

Required - a code indicating the beginning and ending session of the loan period (e.g., 3Q Fall 2000 to Spring-Summer 2000). Use **Table Lookup** for a list of valid values.

**UniqID**

Display only - a unique number, created by CX, to send to the service provider for the loan (e.g., 9999990000U8ES003).

**Fields on the Cosigner Segment**

The following fields appear on Cosigner segment of the Alternate Loans screen (2 of 2). All fields are optional.

**Addr1 (Cosigner)**

The street name and number of the cosigner's permanent address (e.g., 105 Bellevue). This is the first of two address lines.

**Addr1 (Cosigner's Employer)**

The street name and number of the cosigner's employer's permanent address (e.g., 4000 Executive Park Dr.). This is the first of two address lines.

**Addr2 (Cosigner)**

The second address line of the cosigner's permanent address.

**Addr2 (Cosigner's Employer)**

The second address line of the cosigner's employer's permanent address.

**City (Cosigner)**

The city of the cosigner's permanent address (e.g., Lexington).

**City (Cosigner's Employer)**

The city of the cosigner's employer's permanent address (e.g., Cincinnati).

**Citz/Alien No. (Cosigner)**

Consists of two fields. The first field is a code indicating the citizenship of the cosigner (e.g., 1 for U.S. citizen). A list of valid codes appears in the Comment line. The second field is the nine-digit alien registration number and is only used if the cosigner is other than a US citizen or US national.

**Driver's Lic (Cosigner)**

Consists of two fields. The first field is the State code for the state in which the cosigner has a drivers' license (e.g., KY for Kentucky). Use **Table Lookup** for a list of valid codes. The second field is the cosigner's drivers' license number (e.g., KY7802350SD21).

**First/Middle (Cosigner)**

Consists of two fields. The first field is the cosigner's first name (e.g., Carolyn). The second field is the cosigner's middle initial (e.g., G).

**ID/SSN (Cosigner)**

Consists of two fields. The first field is the cosigner's ID number (e.g., 15929). The second field is the cosigner's social security number (e.g., 398-97-0564).

**Last Name (Cosigner)**

The cosigner's last name (e.g., Young).

**Monthly Gross (Cosigner's Employer)**

The cosigner's gross monthly income (e.g., \$5,420.00).

**Name (Cosigner's Employer)**

The name of the cosigner's employer (e.g., Young and Assoc. Inc.).

**Other Name (Cosigner's Employer)**

The name under which the cosigner has been granted credit.

**Phone (Cosigner's Employer)**

The phone number of the cosigner's employer (e.g., 513-587-6222).

**Phone/DOB (Cosigner)**

Consists of two fields. The first field is the cosigner's phone number (e.g., 606-269-8797). The second field is the cosigner's date of birth (e.g., 11/24/1960).

**Position (Cosigner's Employer)**

The cosigner's position with the employer (e.g., Vice President of Mrktg.).

**Signed/Date (Cosigner's Employer)**

Consists of two fields. The first field is a Y (Yes) or N (No) field indicating whether the cosigner has signed the financial aid loan application. The second field is the date

(mm/dd/yyyy) of the signed loan application and appears to the right of the Y/N field if the response is Y.

**State/Zip (Cosigner)**

Consists of two fields. The first field is the State code for the cosigner's state of residence (e.g., KY for Kentucky). The second field is the cosigner's Zip code (e.g., 40503 0000).

**State/Zip (Cosigner's Employer)**

Consists of two fields. The first field is the State code of the cosigner's employer's address (e.g., OH for Ohio). The second field is the zip code of the cosigner's employer's address (e.g., 45241 1111).

**Y/M (Cosigner)**

Consists of two fields. The first field is the number of years the cosigner has lived at this address. The second field is the number of additional months the cosigner has lived at this address (e.g., 15 6 for 15 years and 6 months).

**Y/M (Cosigner's employer)**

Consists of two fields. The first field is the number of years the cosigner has worked for this employer. The second field is the number of additional months the cosigner has worked for this employer (e.g., 10 6 for 10 years and 6 months).

**Commands**

The following list describes the commands you can execute from the Alternate Loans screen.

**Note:** You can use a specific command only when it appears on the current command line, toolbar, menu, or when it is black (not dimmed) on the list that appears when you select **Commands** from the menu bar. Also, you must have the necessary database permission to use that command.

**Add**

Adds a row to the active database table.

**Cancel**

In Update mode - does one or all of the following without saving any of the field entries you have made:

- Backs out of the current command
- Returns to the previous command
- Exits from the current screen

**Certify**

Enables the financial aid administrator to certify that information on the financial aid loan application is correct.

**Change**

Enables the financial aid administrator to modify loan information after the loan has been exported to the loan service provider. This identifies the Loan record as a change transaction file for export to the loan service provider. (Not currently used.)

**Close**

Enables you to exit from the current screen or window.

**Disbursements**

Accesses the Loan Tracking Entry (Disbursements) window enabling you to update the borrower's awarded aid and the amount of each award that has been disbursed in total and for each session.

**External**

Enables the financial aid administrator to import loans that have been created externally.

**Finish**

In Update mode - saves your field entries when you have completed your data entry or selection and want to continue.

**History**

Accesses the Loan Tracking Entry (History) window enabling you to view the status history of the current loan, the date and time the status was entered, and the name and ID of the individual who entered the information.

**Lookup**

Accesses a Table Lookup window listing valid codes or values from which you can choose.

**Next**

Shows the next record in the current list.

**Previous**

Shows the previous record in the current list.

**Screen**

Enables you to move to another screen of data.

**Update**

Changes a row in the active database table.

# Export Loans Screen

## Purpose

The Export Loans screen is a parameters screen that enables you to electronically submit loan applications to the service provider.

## Access

Access the Export Loans screen by selecting the following, beginning at the Student Management: Financial Aid Main menu:

1. Loan Tracking.
2. Export Loans.

## Example

Following is an example of the Export Loans screen.

CARS Menu

File Edit Commands Help

Enter finish. Esc cancel. Ctrl+W help.

EXPORT LOANS

Financial Aid Year 9899

Program UNDG

Site CARS

Original Applications Y

Change Requests N

Enter the financial aid award year. Use F6 for table lookup.

## Fields on the Export Loans Screen

The following fields appear on the Export Loans screen. All fields are required.

### Change Requests

Y (Yes) or N (No) indicating whether you wish to create change request files. (Not currently used.)

### Financial Aid Year

The financial aid award year for which you wish to export loan applications to the loan service provider (e.g., 9899 for 1998-1999).

### Original Applications

Y (Yes) or N (No) indicating whether you wish to create original application files.

### Program

A code identifying the academic program for which you wish to export loan applications to the loan service provider (e.g., UNDG for Undergraduate).

**Site**

The institution location from which you wish to export loan applications to the loan service provider (e.g., CX).

**Commands**

The following list describes the commands you can execute from the Export Loans screen.

**Note:** You can use a specific command only when it appears on the current command line, toolbar, menu, or when it is black (not dimmed) on the list that appears when you select **Commands** from the menu bar. Also, you must have the necessary database permission to use that command.

**Cancel**

Does one or all of the following without saving any of the field entries you have made:

- Backs out of the current command
- Returns to the previous command
- Exits from the current screen

**Finish**

Saves your field entries when you have completed your data entry or selection and want to continue.

**Help**

Displays a brief description of the screen.

# Import Loans Screen

## Purpose

The Import Loans screen is a parameters screen that enables you to electronically import the following from the loan service provider:

- Loan application responses
- Loan application disbursement rosters

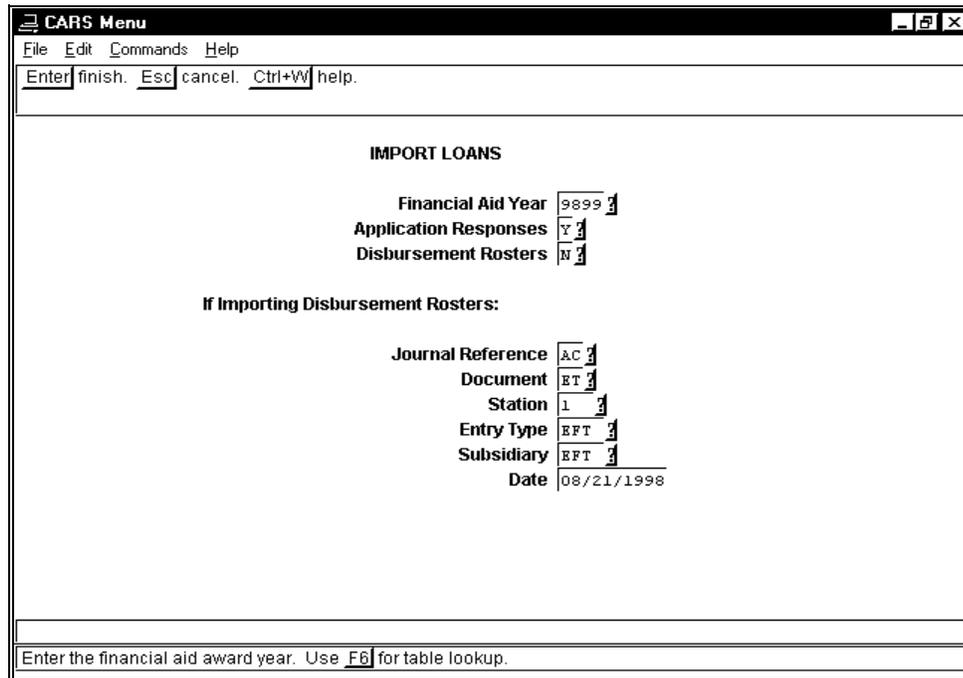
## Access

Access the Import Loans screen by selecting the following, beginning at the Student Management: Financial Aid Main menu:

1. Loan Tracking.
2. Import Loans.

## Example

Following is an example of the Import Loans screen.



CARS Menu

File Edit Commands Help

Enter finish. Esc cancel. Ctrl+W help.

**IMPORT LOANS**

Financial Aid Year 9899

Application Responses Y

Disbursement Rosters N

**If Importing Disbursement Rosters:**

Journal Reference AC

Document ET

Station 1

Entry Type EFT

Subsidiary EFT

Date 08/21/1998

Enter the financial aid award year. Use F6 for table lookup.

## Segments

The Import Loans screen is divided into two segments:

- The upper segment requires information for the Financial Aid Loan year and the type of information you wish to import.
- The lower segment requires specific information for the desired disbursement rosters.

**Note:** The lower segment is only used when you wish to import disbursement rosters.

## Fields on the Upper Segment

The following fields appear on the upper segment of the Import Loans screen.

**Application Responses**

Required - Y (Yes) or N (No) indicating whether you wish to import Loan Application Response files.

**Disbursement Rosters**

Required - Y (Yes) or N (No) indicating whether you wish to import Disbursement Roster files.

**Financial Aid Year**

Required - the financial aid award year for which you wish to import loan applications from the loan service provider (e.g., 9899 for 1998-1999).

**Fields on the Lower Segment**

The following fields appear on the lower segment of the Import Loans screen.

**Date**

Optional - the effective date (mm/dd/yyyy) of the journal to be posted for the Roster file. The system defaults to the current date.

**Document**

Optional - the EFT Document code (e.g., ET for Loan Tracking EFT wire). Use **Table Lookup** for a list of valid codes.

**Entry Type**

Optional - a code indicating the type of entry to post EFT disbursements (e.g., EFT for Loan Tracking EFT wire). Use **Table Lookup** for a list of valid codes.

**Journal Reference**

Optional - a code indicating the journal type to post EFT disbursements (e.g., AC for Accounting Journal). Use **Table Lookup** for a list of valid codes.

**Station**

Required - the EFT station number (e.g., 1). Use **Table Lookup** for a list of valid codes.

**Subsidiary**

Optional - the code indicating in which subsidiary you wish to post EFT disbursements (e.g., EFT for Loan Tracking EFT wire). Use **Table Lookup** for a list of valid codes.

**Commands**

The following list describes the commands you can execute from the Import Loans screen.

**Note:** You can use a specific command only when it appears on the current command line, toolbar, menu, or when it is black (not dimmed) on the list that appears when you select **Commands** from the menu bar. Also, you must have the necessary database permission to use that command.

**Cancel**

Does one or all of the following without saving any of the field entries you have made:

- Backs out of the current command
- Returns to the previous command
- Exits from the current screen

**Finish**

Saves your field entries when you have completed your data entry or selection and want to continue.

**Help**

Displays a brief description of the screen.



**Note:** The system maintains all fields, which are display-only.

**ACST**

A code identifying the student's current academic status. Valid codes are:

- Blank (No academic status yet)
- ACPT (Full acceptance)
- ALOA (Academic leave of absence)
- CANC (Student cancelled registration)
- CD (Conditional acceptance)
- FULL (Fully admitted/enrolled)
- GRAD (Graduate student)
- PB (Academic probation)
- VW (Voluntary withdrawal)

**Cur**

The current loan being viewed (e.g., 1 for first).

**Grad**

The session and year the student plans to graduate (e.g., SP 2003).

**ID**

The number used to identify the student in the CX database (e.g., 5061480). The student's name appears to the right in last, first, middle format (e.g., Young, Rick A.).

**Major**

A code identifying the student's intended major (e.g., ACC for Accounting).

**Num**

The total number of loans listed for this student (e.g., 7).

**Prog**

A code identifying the academic program for which you want to process loan information (e.g., UNDG for Undergraduate).

**SSN**

The student's social security number (e.g., 506-85-5421).

**Start**

The beginning session and year for which the student is enrolled (e.g., FA 2000).

**Fields on the Loan Summary Segment**

The following fields appear on the Loan Summary segment of the Loan Summary screen. All fields are display only.

**Certified**

The approved gross amount for which the loan is to be certified (e.g., 2.00)

**Gr**

A code indicating the grade level of the applicant (e.g., 1 for First-time Freshman).

**Grand Total**

The combined total dollar amount of all financial aid loans awarded to a student for all financial aid years (e.g., 8502.00).

**Loan Prd/Status**

Consists of two fields. The first field is the beginning and ending dates of the current loan period for each loan (e.g., 01/13/01 07/15/01). The second field is the current status of the loan (e.g., Entered on CX). For a detailed definition of the loan status codes, see *Loan Status Codes* and *Disbursement Status Codes* at the end of this section.

**Loan Type/Unique ID**

Consists of two fields. The first field is a description of the type of financial aid loan (e.g., CommonLine UNSB Loan). The second field is the unique number, created by CX, to send to the service provider for the loan (e.g., 9999990000U7E0002).

**MPN**

A code indicating how this master promissory note is used. Valid options are S (serial - renew existing MPN), or N (new).

**Prior Years**

The combined total dollar amount of all the student's financial aid loans awarded in all financial aid award years prior to the current financial aid award year (e.g., 0.00).

**Summarized Totals**

The total dollar amount of all the student's financial aid loans per financial aid award year for each type of loan. This consists of three fields showing the financial aid award year (e.g., 0001), the type of financial aid loan (e.g., STAF for Stafford), and the total amount awarded (e.g., 5502). For example, this student was awarded \$5502 in Stafford loans for the 2000-2001 financial aid award year.

**Total**

The combined total dollar amount of all the student's financial aid loans per financial aid award year. This consists of two fields showing the financial aid award year (e.g., 0001) and the total amount awarded (e.g., 8502).

**Commands**

The following list describes the commands you can execute from the Loan Summary screen.

**Note:** You can use a specific command only when it appears on the current command line, toolbar, menu, or when it is black (not dimmed) on the list that appears when you select **Commands** from the menu bar. Also, you must have the necessary database permission to use that command.

**Alternate**

Enables you to access the Alternate Loans screen, which displays Key Alternate Loan information.

**Exit**

Enables you to leave the current screen or program.

**Master-prom-note**

Enables you to access the MPN (Master-promissory-note) Loans screen, which displays Stafford Loan information.

**Note:** Use this menu option only for Stafford loans created for the 2000-2001 financial aid award year and beyond. To access Stafford loans created prior to the 2000-20001 financial aid award year, use the Stafford menu option.

**Page Down**

Enables you to move forward one screen of data if additional screens exist.

**Page Up**

Enables you to move back one screen of data if additional screens exist.

**Plus**

Enables you to access the Parent Loans (PLUS) screen, which displays Federal PLUS Loan information.

**Query**

Puts the screen into Query mode. Searches the active database table for rows that match the data you enter into one or more fields.

**Stafford**

Enables you to access the Federal Stafford Loans screen.

**Note:** Use this menu option only for Stafford loans created prior to the 2000-20001 financial aid award year. To access Stafford loans created for the 2000-2001 financial aid award year and beyond, use the Master-prom-note menu option.

### **Tables**

Accesses the Loan Tables menu. For more information on the Financial Aid Loan tables, see the *Financial Aid Technical Manual*.

**Note:** You must have database permission to use the Tables command. Contact your Jenzabar coordinator for assistance.

# Loan Tracking Entry (Change History) Window

## Purpose

The Loan Tracking Entry (Change History) window enables you to view and update the status of the Change Transaction record for a Loan record with a minimum status of Guaranteed. This means that this loan has already been created, exported to the guarantor, guaranteed by the guarantor, and imported back to the Jenzabar system. Use this window when you have updated a previously guaranteed loan. For more information, see the *Change Transaction Send Files* section in this manual.

## Access

Access the Loan Tracking Entry (Change History) window by selecting the following, beginning at the Student Management: Financial Aid Main menu:

1. Loan Tracking.
2. Loan Tracking Entry.
3. Enter parameters.
4. **Finish**.
5. Enter the desired student ID or social security number in the ID field, or perform a query to find the student.
6. **Finish**.
7. Select either **Alternate**, **Master-Prom-Note**, **Plus** or **Stafford** from the Commands menu.
8. Verify that the Loan record has a minimum status of Guaranteed.
9. Select **Next** or **Previous**, if necessary, to access the desired Loan record.
10. Select **Change** from the Commands menu.

**Note:** You can only access the Loan Tracking Entry (Change History) window if the Loan record has a minimum status of Guaranteed.

## Example

Following is an example of the Loan Tracking Entry (Change History) window.

Act	Description of Change/Previous Value	Added/By	S/D#	Cmpl/DDate
<input checked="" type="checkbox"/> 0728	Student Anticipated Completion Date Chg 07/21/2005	08/03/2000 kbartmes	X	08/03/2000
<input checked="" type="checkbox"/> 1028	Post-Disb Disbursement Cancel Date. 08/02/2000	08/02/2000 kyang	X 1	08/02/2000 07/31/2001
<input checked="" type="checkbox"/> 1029	Cancellation Amount. 00011000	08/02/2000 kyang	X 1	08/02/2000 07/31/2001
<input checked="" type="checkbox"/> 1031	Actual Returned Amount. 00000000	08/02/2000 kyang	X 1	08/02/2000 07/31/2001

## Fields

The following fields appear on the Loan Tracking Entry (Change History) window.

### Act

Required - the Action code for the action you wish to take for this change in the Loan record. Valid options are:

- E (Export automatically)
- T (Terminate request)
- X (Export manually)

### Added/By

Display only - consists of two fields. The first field is the Added Date field and displays the date (mm/dd/yyyy) this change was made to the guaranteed loan. The second field is the User ID field. This unlabeled field displays the user name of the person who made the change and appears below the Added Date field (e.g., kbartmes).

#### **Cmpl/DDate**

Display only - consists of two fields. The first field is the Done Date field and displays the date (mm/dd/yyyy) the change request was exported or terminated. The second field is the Disbursement Date field and displays the scheduled date (mm/dd/yyyy) of the disbursement, if one exists. The Disbursement Date field appears on the second line of the Cmpl/DDate field.

#### **Description of Change/Previous Value**

Display only - consists of three fields. The first field is the Loan Tracking Change Code field. This unlabeled field displays the Change code for the current Loan Tracking field (e.g., 0728) and appears to the left of the description. The second field is the Description of Change field and displays the description of the Change code for the current Loan Tracking field (e.g., Student Anticipated Completion Date Chg). The third field is the Previous Value field and identifies the previous value of a particular Loan field (e.g., 07/21/2005). This field appears on the second line of the Description of Change/Previous Value field.

#### **S/D#**

Display only - consists of two fields. The first field is the Change Status field and displays the Change Request Status code (e.g., X for Export manually). The second field is the Disbursement Number field and displays the number of the disbursement that is being changed (e.g., 1). This field appears on the second line of the S/D# field.

### **Commands**

The following list describes the commands you can execute from the Loan Tracking Entry (Change History) window.

**Note:** You can use a specific command only when it appears on the current command line, toolbar, menu, or when it is black (not dimmed) on the list that appears when you select **Commands** from the menu bar. Also, you must have the necessary database permission to use that command.

#### **Cancel**

Enables you to exit from the current window and returns you to the current Loan screen without saving any changes to the Loan record.

#### **Finish**

Enables you to save your field entries, exit from the current window, and return to the current Loan screen.

#### **Lookup**

Enables you to access the Table Lookup window and view the valid Action code options for the Action field.

#### **Page Down**

Enables you to move forward one screen of data, if additional screens exist.

#### **Page Up**

Enables you to move backward one screen of data if additional screens exist.

# Loan Tracking Entry (Disbursements) Window

## Purpose

The Loan Tracking Entry (Disbursements) window enables you to update the borrower's awarded aid and the amount of each award that has been disbursed in total and for each session.

## Access

Access the Loan Tracking Entry (Disbursements) window by selecting the following, beginning at the Student Management: Financial Aid Main menu:

1. Loan Tracking.
2. Loan Tracking Entry.
3. Enter parameters.
4. **Finish.**
5. Enter the desired student ID or social security number in the ID field, or perform a query to find the student.
6. **Finish.**
7. Select either **Alternate, Master-Prom-Note, Plus** or **Stafford** from the Commands menu.
8. Select **Disbursements** from the Commands menu.

### Notes:

- Other paths may exist.
- You can only access the Loan Tracking Entry (Disbursements) window after you have added a Stafford Loan, a PLUS Loan, or an Alternate Loan to the student's Loan Tracking record.

## Example

Following is an example of the Loan Tracking Entry (Disbursements) window.

Loan Tracking Entry						
# Aid	Sess Year	Expected	Guaranteed	Disbursed	Released	DisbStatus
1	TNSB FA	999	06/28/2000			Disbursed
	9900	375.00	364.03	0.00	0.00	0.00 06/21/2000
		Hold/Release		Disbursement Method		
2	TNSB FP	000	06/28/2000			Disbursed
	9900	375.00	364.00	0.00	0.00	0.00 06/21/2000
		Hold/Release		Disbursement Method		
		Hold/Release		Disbursement Method		
		Hold/Release		Disbursement Method		

## Fields

The following fields appear on the Loan Tracking Entry (Disbursements) window.

#

Required - the loan disbursement number (e.g., 1).

Aid

Required - the financial aid code for this disbursement (e.g., UNSB for Unsubsidized Stafford loan). Use **Table Lookup** for a list of valid codes.

**(Aid Year)**

Optional - this field is located under the Aid field. The financial aid award year in which the loan period begins (e.g., 9900 for 1999-2000).

**(Amount of Disbursement)**

Optional - this field is located under the Disbursed field. The amount of the disbursement the borrower received.

**(Date)**

Display only - this field is located under the DisbStatus field. The date (mm/dd/yyyy) of the current status of the loan disbursement.

**DisbStatus**

Required - a code indicating the status of the disbursement (e.g., D for Disbursed). A description of the code appears to the right of the field. Use **Table Lookup** for a list of valid codes. For a detailed definition of the disbursement status codes, see *Disbursement Status Codes* at the end of this section.

**Disbursed**

Optional - the date (mm/dd/yyyy) the financial aid loan amount is disbursed to the borrower's account.

**Disbursement Method**

Optional - the method used to disburse the financial aid loan amount to the borrower's account. Valid options are:

- (Blank)
- E (EFT)
- I (Individual Check)
- N (Netting)
- M (Master Checking)

**Expected**

Optional - the expected date (mm/dd/yyyy) of the disbursement to the borrower's account.

**(Expected Net Amount of Disbursement)**

Optional - this field is located under the Expected field. The net disbursement amount that you expect the service provider to release to the borrower's account (e.g., 364.03).

**(Gross Amount of Disbursement)**

Optional - this field is located under the Sess and Year fields. The gross amount of the disbursement packaged for the borrower's account (e.g., 375.00).

**Guaranteed**

Optional - the guaranteed release date (mm/dd/yyyy) of the disbursement to the borrower's account.

**(Guaranteed Amount of Disbursement)**

Optional - this field is located under the Guaranteed field. The guaranteed amount of the disbursement to be released to the borrower's account.

**Hold/Release**

Optional - a code indicating whether to hold or release the disbursement to the borrower's account. Valid options are:

- (Blank)
- H (Hold)
- R (Release)

**Released**

Optional - the release date (mm/dd/yyyy) of the disbursement to the student account.

**(Release Amount of Disbursement)**

Optional - this field is located below the Released field. The actual amount of the disbursement released to the borrower's account.

**Sess**

Required - a code indicating the session for which the borrower is receiving the disbursement (e.g., SP for Spring). Use **Table Lookup** for a list of valid codes.

**Year**

Required - the academic year (yyyy) for the current disbursement. Use **Table Lookup** for a list of valid years.

**Commands**

The following list describes the commands you can execute from the Loan Tracking Entry (Disbursements) window.

**Note:** You can use a specific command only when it appears on the current command line, toolbar, menu, or when it is black (not dimmed) on the list that appears when you select **Commands** from the menu bar. Also, you must have the necessary database permission to use that command.

**Add-line**

Enables you to add a line in the list of Loan Tracking Entry disbursements.

**Cancel**

Does one or all of the following without saving any of the field entries you have made:

- Backs out of the current command
- Returns to the previous command
- Exits from the current screen

**Del-line**

Enables you to delete a line in the list of Loan Tracking Entry disbursements.

**Finish**

Saves your field entries when you have completed your data entry or selection and want to continue.

**Lookup**

Accesses a Table Lookup window listing valid codes or values from which you can choose.

**Options**

Accesses the Manual Update window listing disbursement statuses from which you can choose.

**Page Down**

Enables you to move forward one screen of data, if additional screens exist.

**Page Up**

Enables you to move backward one screen of data if additional screens exist.

# Loan Tracking Entry (History) Window

## Purpose

The Loan Tracking Entry (History) window is a display-only window that enables you to view the status history of the current loan, the date and time the status was entered, and the name and ID of the individual who entered the information.

## Access

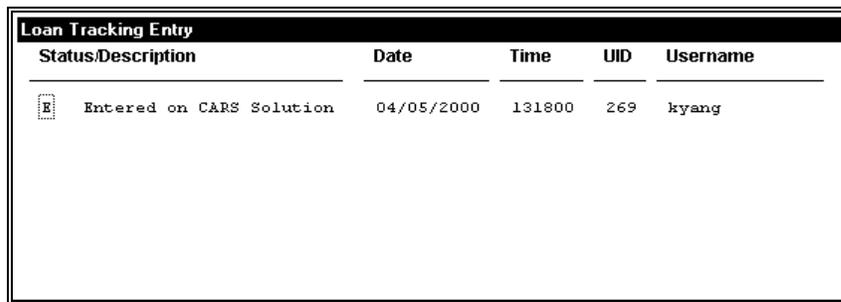
Access the Loan Tracking Entry (History) window by selecting the following, beginning at the Student Management: Financial Aid Main menu:

1. Loan Tracking.
2. Loan Tracking Entry.
3. Enter parameters.
4. **Finish.**
5. Enter the desired student ID or social security number in the ID field, or perform a query to find the student.
6. **Finish.**
7. Select either **Alternate**, **Master-Prom-Note**, **Plus** or **Stafford** from the Commands menu.
8. Select **History** from the Commands menu.

**Note:** You can only access the Loan Tracking Entry (History) window after you have added a Stafford Loan through the MPN Loans screens, a PLUS Loan, or an Alternate Loan to the student's Loan Tracking record.

## Example

Following is an example of the Loan Tracking Entry (History) window.



Loan Tracking Entry				
Status/Description	Date	Time	UID	Username
E Entered on CARS Solution	04/05/2000	131800	269	kyang

## Fields

The following fields appear on the Loan Tracking Entry (History) window. All fields are display-only.

### Date

The date (mm/dd/yyyy) the status was applied to the current loan.

### Status/Description

Consists of two fields. The first field is a code indicating the status of the loan application (e.g., E). The second field is the description of the Status code (e.g., Entered on CX). For a detailed definition of the loan status codes, see *Loan Status Codes* and *Disbursement Status Codes* at the end of this section.

### Time

The time (in military time format) the status was applied to the current loan (e.g., 131800 for 1:18 PM).

**UID**

The User ID number of the individual who entered the status of the current loan (e.g., 269).

**Username**

The User name of the individual who entered the status of the current loan (e.g., kyang).

**Commands**

The following list describes the commands you can execute from the Loan Tracking Entry (History) window.

**Note:** You can use a specific command only when it appears on the current command line, toolbar, menu, or when it is black (not dimmed) on the list that appears when you select **Commands** from the menu bar. Also, you must have the necessary database permission to use that command.

**Cancel**

Enables you to exit from the current window and returns you to the current Loan screen.  
*(Question - Why do we have both the Cancel and the Finish command for this window when it looks like both commands to exactly the same thing? - Karen 042700)*

**Finish**

Enables you to exit from the current window and returns you to the current Loan screen.

**Page Down**

Enables you to move forward one screen of data, if additional screens exist.

**Page Up**

Enables you to move backward one screen of data if additional screens exist.

# MPN Loans Screens

## Purpose

The MPN Loans screens consist of two screens that enable you to add, update, and certify Stafford loans through the Master-promissory-note process.

**Note:** Use the MPN Loans screen to create, update, or view Stafford Loan records for the 2000-2001 financial aid award year and beyond. If you wish to access Stafford Loan records created prior to 2000-2001, you must access them through the Stafford Loans screens. For more information on the Stafford Loans screens see *Stafford Loans Screens* in this section.

## Access

Access the MPN Loans screen by selecting the following, beginning at the Student Management: Financial Aid Main menu:

1. Loan Tracking.
2. Loan Tracking Entry.
3. Enter parameters.
4. **Finish.**
5. Enter the desired student ID or social security number in the ID field, or perform a query to find the student.
6. **Finish.**
7. Select **Master-prom-note** from the Commands menu.

**Note:** To access the MPN Loans screen (2 of 2), select **Screen** from the Commands menu at the MPN Loans screen (1 of 2)

## Example (1 of 2)

Following is an example of the MPN Loans screen (1 of 2).

The screenshot shows a window titled "Loan Tracking Entry - Loan Tracking" with a menu bar (File, Edit, Commands, Help) and a toolbar with icons for checkmark, search, left arrow, right arrow, and a key. The main area displays the following data:

<b>ID:</b> 5061480	Young, Rick A.	<b>SSN:</b> 506-85-5421	<b>Cur:</b> 1
<b>Prog:</b> UNDC	<b>Major:</b> ACC	<b>Acst:</b> ACPT	<b>Start:</b> FA
2000	<b>Grad:</b> SP	2003	<b>Num:</b> 6

Originator... COMMON	CommonLine	UniqID.. 9999990000U7E0002
Aid Year.... 0001		Period.. SS SPRG 01 - SUMMER 01
Loan Type.... 06	CommonLine UNSE Loan	BegEnd.. 01/13/2001 - 07/15/2001
Grade Level.. 1	1st Year (freshman)	Requested Service.... CR

STUDENT		STUDENT CONT'D		LOAN	
Guarantor.... 800	Citizenship..... 3	Lender ID/EFT... 123123	Y	Request Amt.....	2.00
Antic Grad.... 01/01/2003	Alien Reg No....	Orig Fee Pct....	1.100	Pay Interest... N	Driver Lic St... CA
Enroll Stat... F	Dependent..... D	Lic#.. 121212121	Approved UNSE... 0.00	Date of Birth... 01/01/1980	Signed..... Y
				04/05/2000	Stat/Date. E 04/05/2000
Serial Code... S	References..... N	Entered on CARS Solutio		Exported....	
Delivery..... E	Certified.....	Est Aid..... 45325			
Attend Cost... 35435	Family Contr.. 2342				

## Segments (1 of 2)

The MPN Loans screen (1 of 2) is divided into three segments:

- The Header segment provides ID information about the selected student.
- The Upper segment provides Stafford Loan information about the selected student.
- The Lower segment provides specific information about the student borrower and the loan status.

## Fields on the Header Segment (1 of 2)

The following fields appear on the Header segment of the MPN Loans screen (1 of 2).

**Note:** The system maintains all fields, which are display-only.

### ACST

A code identifying the student's current academic status. Valid codes are:

- Blank (No academic status yet)
- ACPT (Full acceptance)
- ALOA (Academic leave of absence)
- CANC (Student cancelled registration)
- CD (Conditional acceptance)
- FULL (Fully admitted/enrolled)
- GRAD (Graduate student)
- PB (Academic probation)
- VW (Voluntary withdrawal)

### Cur

The current loan being viewed (e.g., 1 for first).

### Grad

The session and year the student plans to graduate (e.g., SP 2003).

### ID

The number used to identify the student in the CX database (e.g., 5061480). The student's name appears to the right in last, first, middle format (e.g., Young, Rick A.).

### Major

A code identifying the student's intended major (e.g., ACC for Accounting).

### Num

The total number of MPN loans listed for this student (e.g., 5).

### Prog

A code identifying the academic program for which you want to process loan information (e.g., UNDG for Undergraduate).

### SSN

The student's social security number (e.g., 506-85-5421).

### Start

The beginning session and year for which the student is enrolled (e.g., FA 2000).

## Fields on the Upper Segment (1 of 2)

The following fields appear on the upper segment of the MPN Loans screen (1 of 2).

### Aid Year

Required - the financial aid award year in which the loan period begins (e.g., 0001 for 2000-2001). Use **Table Lookup** for list of valid values.

### BegEnd

Required - the financial aid loan period beginning date and ending date (e.g., 01/13/2001-07/15/2001).

**Grade Level**

Required - a code indicating the student's grade level (e.g., 1 for first year freshman). A description of the grade level appears to the right. Use **Table Lookup** for a list of valid values.

**Loan Type**

Required - a code indicating the type of loan requested (e.g., 06 for CommonLine Unsubsidized Loan). A description of the loan type appears to the right. Use **Table Lookup** for a list of valid values.

**Originator**

Required - a code indicating whether the loan service provider is CommonLine (COMMON), Direct Lending (DIRECT), or Key Alternate Loans (KEY). The description of the service provider appears to the right. Use **Table Lookup** for a list of valid values.

**Period**

Required - a code indicating the beginning and ending session of the loan period (e.g., SS for Spring 2001 to Summer 2001). Use **Table Lookup** for a list of valid values.

**Requested Service**

Required - a code identifying the type of request to process (e.g., CR for certified). Use **Table Lookup** for a list of valid codes.

**UniqID**

Display only - a unique number, created by CX, to send to the service provider for the loan (e.g., 9999990000U7E0002).

**Fields on the Lower Segment (1 of 2)**

The following fields appear on the lower segment of the MPN Loans screen (1 of 2).

**Alien Reg No**

Optional - if the student borrower is other than a US citizen or US national, the student's nine-digit alien registration number.

**Antic Grad**

Optional - the anticipated date (mm/dd/yyyy) of the student's graduation.

**Approved UNSB**

Optional - this field displays if the current loan is a CommonLine UNSB (Unsubsidized) or CommonLine STAF/UNSB (one Stafford and one Unsubsidized) Loan. The gross amount approved for the CommonLine Unsubsidized Loan currently displayed.

**Attend Cost**

Display only - the student's cost of attendance (e.g., 35435).

**Certified**

Display only - the date (mm/dd/yyyy) the loan was certified.

**Citizenship**

Optional - a code indicating the citizenship of the parent borrower (e.g., 1 for U.S. citizen). A list of valid codes appears in the Comment line.

**Date of Birth**

Optional - the birth date (mm/dd/yyyy) of the student borrower.

**Delivery (MPN)**

Required - a code indicating how this master promissory note is to be delivered. Valid codes are E for email, P for paper, or W for Web.

**Dependent**

Optional - a code indicating the student's dependency status. Valid codes are:

- D (Dependent)
- I (Independent)
- P (Professional judgement)

**Driver Lic St**

Optional - the State code for the state in which the borrower has a drivers' license (e.g., CA for California). Use **Table Lookup** for a list of valid codes.

**Enroll Stat**

Optional - a code indicating the student's enrollment status (e.g., F for full time enrollment). Use **Table Lookup** for a list of valid codes.

**Est Aid**

Display only - the estimated amount of financial aid for which the student is eligible (e.g., 45325).

**Exported**

Display only - the date (mm/dd/yyyy) the loan was exported.

**Family Contr**

Display only - the amount of the student's Expected Family Contribution (EFC) (e.g., 2342).

**Guarantor**

Optional - a code indicating the service provider of the financial aid loan (e.g., AK for USA Funds). Use **Table Lookup** for a list of valid options.

**Note:** The Guarantor field is only used for CommonLine loans.

**Lender ID/EFT**

Optional - the identification number of the bank making the CommonLine Loan (e.g., 123123). Y or N indicating whether or not the bank offers EFT (Electronic Funds Transfer) appears to the right of the field.

**Lic#**

Optional - the student borrower's drivers' license number (e.g., 121212121).

**Orig Fee Pct**

Optional - the percentage charged by the service provider for the financial aid loan (e.g., 1.100).

**Pay Interest**

Optional - Y (yes) or N (no) indicating whether the student borrower wishes to pay interest while in school.

**References**

Optional - Y (Yes) or N (No) indicating whether the student borrower's references have been checked.

**Note:** The References field is only used for CommonLine loans.

**Request Amt**

Optional - the gross amount requested for the financial aid loan (e.g., 2.00).

**Serial Code (MPN)**

Required - a code indicating how this master promissory note is to be used. Valid codes are N (New master promissory note) or S (Serial to renew an existing master promissory note).

**Signed**

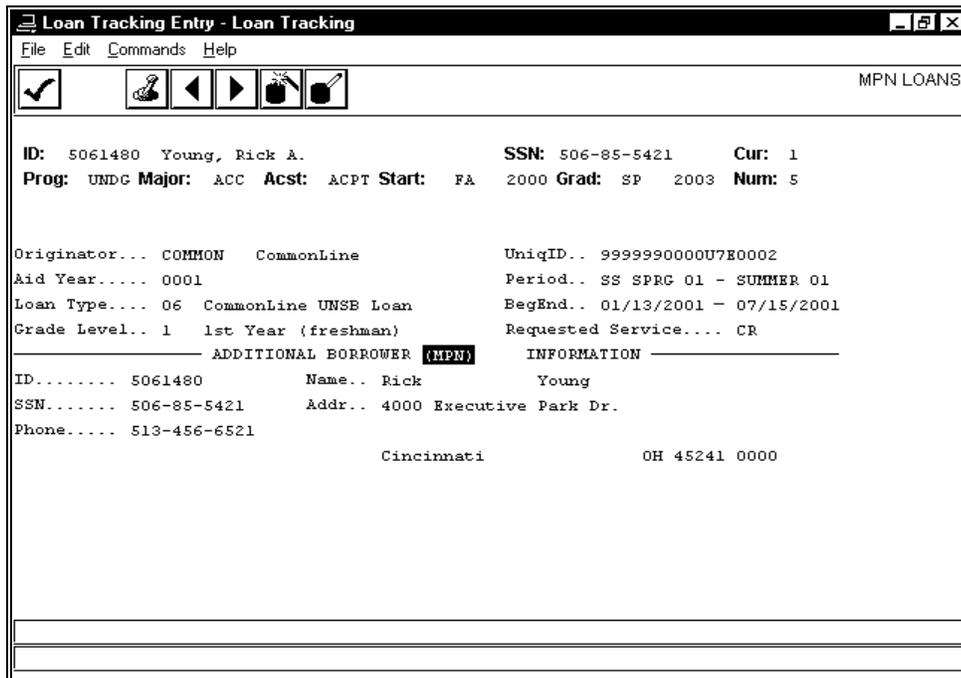
Optional - Y (Yes) or N (No) indicating whether the student borrower has signed the financial aid loan application. The date (mm/dd/yyyy) of the signed loan application appears to the right if the response is Y.

**Stat/Date**

Optional - a code indicating the status of the loan application (e.g., E for Entered). The date (mm/dd/yyyy) of the current loan status appears to the right. The description of the code appears below the code. Use **Table Lookup** for a list of valid codes. For a detailed definition of the loan status codes, see *Loan Status Codes* and *Disbursement Status Codes* at the end of this section.

**Example (2 of 2)**

Following is an example of the MPN Loans screen (2 of 2).



The MPN Loans screen (2 of 2) is divided into three segments:

- The header segment provides ID information about the selected student.
- The upper segment provides Stafford Loan information about the selected student.
- The Additional Borrower Information segment provides address and identification information about the selected student for the current financial aid Stafford Loan record.

**Fields on the Header Segment (2 of 2)**

The following fields appear on the header segment of the MPN Loans screen (2 of 2).

**Note:** The system maintains all fields, which are display-only.

**ACST**

A code identifying the student's current academic status. Valid codes are:

- Blank (No academic status yet)
- ACPT (Full acceptance)
- ALOA (Academic leave of absence)
- CANC (Student cancelled registration)
- CD (Conditional acceptance)
- FULL (Fully admitted/enrolled)

- GRAD (Graduate student)
- PB (Academic probation)
- VW (Voluntary withdrawal)

**Cur**

The current loan being viewed (e.g., 1 for first).

**Grad**

The session and year the student plans to graduate (e.g., SP 2003).

**ID**

The number used to identify the student in the CX database (e.g., 5061480). The student's name appears to the right in last, first, middle format (e.g., Young, Rick A.).

**Major**

A code identifying the student's intended major (e.g., ACC for Accounting).

**Num**

The total number of MPN loans listed for this student (e.g., 5).

**Prog**

A code identifying the academic program for which you want to process loan information (e.g., UNDG for Undergraduate).

**SSN**

The student's social security number (e.g., 506-85-5421).

**Start**

The beginning session and year for which the student is enrolled (e.g., FA 2000).

**Fields on the Upper Segment (2 of 2)**

The following fields appear on the upper segment of the MPN Loans screen (2 of 2).

**Aid Year**

Required - the financial aid award year in which the loan period begins (e.g., 0001 for 2000-2001). Use **Table Lookup** for list of valid values.

**BegEnd**

Required - the financial aid loan period beginning date and ending date (e.g., 01/13/2001-07/15/2001).

**Grade Level**

Required - a code indicating the student's grade level (e.g., 1 for first year freshman). A description of the grade level appears to the right. Use **Table Lookup** for a list of valid values.

**Loan Type**

Required - a code indicating the type of loan requested (e.g., 06 for CommonLine UNSB Loan). A description of the loan type appears to the right. Use **Table Lookup** for a list of valid values.

**Originator**

Required - a code indicating whether the loan service provider is CommonLine (COMMON), Direct Lending (DIRECT), or Key Alternate Loans (KEY). The description of the service provider appears to the right. Use **Table Lookup** for a list of valid values.

**Period**

Required - a code indicating the beginning and ending session of the loan period (e.g., SS for Spring 2001 to Summer 2001). Use **Table Lookup** for a list of valid values.

**Requested Service**

Optional - a code identifying the type of request to process (e.g., CR for certified). Use **Table Lookup** for a list of valid codes.

**Note:** The Requested Service field is only used for CommonLine loans.

#### **UniqID**

Display only - a unique number, created by CX, to send to the service provider for the loan (e.g., 9999990000U7E0002).

### **Fields on the Additional Borrower Information Segment**

The following fields appear on Additional Borrower Information segment of the MPN Loans screen (2 of 2). All fields are optional.

#### **Addr**

The street name and number of the student's permanent address (e.g., 4000 Executive Park Dr.). This field consists of two lines.

#### **(City)**

This field is located below the Address field. The city of the student's permanent address (e.g., Cincinnati).

#### **ID**

The number used to identify the student in the CX database (e.g., 5061480).

#### **Name**

The name of the student in first, middle, last format (e.g., Rick Young).

#### **Phone**

The phone number at the student's permanent residence (e.g., 513-456-6521).

#### **SSN**

The student's social security number (e.g., 506-85-5421).

#### **(State)**

This field is located to the right of the (City) field. A code indicating the state of the student's permanent address (e.g., OH for Ohio). Use **Table Lookup** for a list of valid codes.

#### **(Zip Code)**

This field is located to the right of the (State) field. The zip code of the student's permanent address (e.g., 45241 0000).

### **Commands**

The following list describes the commands you can execute from the MPN Loans screen.

**Note:** You can use a specific command only when it appears on the current command line, toolbar, menu, or when it is black (not dimmed) on the list that appears when you select **Commands** from the menu bar. Also, you must have the necessary database permission to use that command.

#### **Add**

Adds a row to the active database table.

#### **Cancel**

In Update mode - does one or all of the following without saving any of the field entries you have made:

- Backs out of the current command
- Returns to the previous command
- Exits from the current screen

#### **Certify**

Enables the financial aid administrator to certify that information on the financial aid loan application is correct.

**Change**

Enables the financial aid administrator to modify loan information after the loan has been exported to the loan service provider. This identifies the Loan record as a change transaction file for export to the loan service provider. (Not currently used.)

**Close**

Enables you to exit from the current screen or window.

**Disbursements**

Accesses the Loan Tracking Entry (Disbursements) window enabling you to update the borrower's awarded aid and the amount of each award that has been disbursed in total and for each session.

**External**

Enables the financial aid administrator to import loans that have been created externally.

**Finish**

In Update mode - saves your field entries when you have completed your data entry or selection and want to continue.

**History**

Accesses the Loan Tracking Entry (History) window enabling you to view the status history of the current loan, the date and time the status was entered, and the name and ID of the individual who entered the information.

**Lookup**

Accesses a Table Lookup window listing valid codes or values from which you can choose.

**Next**

Shows the next record in the current list.

**Previous**

Shows the previous record in the current list.

**Screen**

Enables you to move to another screen of data.

**Update**

Changes a row in the active database table.



- The Lower segment provides specific information about the student, the parent borrower, and the loan status.

### Fields on the Header Segment (1 of 2)

The following fields appear on the Header segment of the Parent Loans (PLUS) screen (1 of 2).

**Note:** The system maintains all fields, which are display-only.

#### ACST

A code identifying the student's current academic status. Valid codes are:

- Blank (No academic status yet)
- ACPT (Full acceptance)
- ALOA (Academic leave of absence)
- CANC (Student cancelled registration)
- CD (Conditional acceptance)
- FULL (Fully admitted/enrolled)
- GRAD (Graduate student)
- PB (Academic probation)
- VW (Voluntary withdrawal)

#### Cur

The current loan being viewed (e.g., 1 for first).

#### Grad

The session and year the student plans to graduate (e.g., FA 2002).

#### ID

The number used to identify the student in the CX database (e.g., 5061575). The student's name appears to the right in last, first, middle format (e.g., Dominguez, Joseph).

#### Major

A code identifying the student's intended major (e.g., ACC for Accounting).

#### Num

The total number of loans listed for this student (e.g., 1).

#### Prog

A code identifying the academic program for which you want to process loan information (e.g., UNDG for Undergraduate).

#### SSN

The student's social security number (e.g., 421-65-8116).

#### Start

The beginning session and year for which the student is enrolled (e.g., FA 2000).

### Upper Segment (1 of 2)

The following fields appear on the upper segment of the Parent Loans (PLUS) screen (1 of 2).

#### Aid Year

Required - the financial aid award year in which the loan period begins (e.g., 0001 for 2000-2001). Use **Table Lookup** for list of valid values.

#### BegEnd

Required - the financial aid loan period beginning date and ending date (e.g., 03/03/2000-07/15/2001).

#### Grade Level

Required - a code indicating the student's grade level (e.g., 1 for first year freshman). A description of the grade level appears to the right. Use **Table Lookup** for a list of valid values.

**Loan Type**

Required - a code indicating the type of loan requested (e.g., 03 for CommonLine PLUS Loan). A description of the loan type appears to the right. Use **Table Lookup** for a list of valid values.

**Originator**

Required - a code indicating whether the loan service provider is CommonLine (COMMON), Direct Lending (DIRECT), or Key Alternate Loans (KEY). The description of the service provider appears to the right.

**Period**

Required - a code indicating the beginning and ending session of the loan period (e.g., 3Q for Fall 2000 to Spring/Summer 2001). Use **Table Lookup** for a list of valid values.

**Requested Service**

Optional - a code identifying the type of request to process (e.g., CR for certified). Use **Table Lookup** for a list of valid codes.

**UniqID**

Display only - a unique number, created by CX, to send to the service provider for the loan (e.g., 9999990000U93S001).

**Fields on the Lower Segment (1 of 2)**

The following fields appear on the lower segment of the Parent Loans (PLUS) screen (1 of 2).

**Alien Reg No**

Optional - if the borrower is other than a US citizen or US national, the parent's nine-digit alien registration number.

**Allow EFT**

Optional - Y (Yes) or N (No) indicating whether the borrower wishes to allow loan proceeds to be transferred electronically.

**Antic Grad**

Optional - the anticipated date (mm/dd/yyyy) of the student's graduation.

**Approved Amt**

Optional - this field displays if the current loan is a Direct Lending PLUS Loan. The gross amount approved for the Direct Lending PLUS Loan currently displayed.

**Approved PLUS**

Optional - this field displays if the current loan is a CommonLine PLUS Loan. The gross amount approved for the CommonLine PLUS Loan currently displayed (e.g., 3000.00).

**Attend Cost**

Optional - the student's cost of attendance (e.g., 18000).

**Borrower ID**

Optional - the parent borrower's ID number (e.g., 5039846).

**Certified**

Display only - the date (mm/dd/yyyy) the loan was certified.

**Citizenship**

Optional - a code indicating the citizenship of the parent borrower (e.g., 1 for U.S. citizen). A list of valid codes appears in the Comment line.

**Date of Birth**

Optional - the birth date (mm/dd/yyyy) of the parent borrower.

**Defer Pmt**

Optional - Y (Yes) or N (No) indicating whether the borrower requests that loan payments be deferred while the student is in school.

**Dependent**

Display only - a code indicating the student's dependency status. Valid codes are:

- D (Dependent)
- I (Independent)
- P (Professional judgement)

**Note:** The Dependent field is only used for Stafford loans.

**Driver Lic St**

Optional - a code indicating the state in which the parent borrower has a drivers' license (e.g., OH for Ohio). Use **Table Lookup** for a list of valid codes.

**Enroll Stat**

Optional - a code indicating the student's enrollment status (e.g., F for full-time student). A list of valid codes appears in the Comment line.

**Est Aid**

Optional - the estimated amount of financial aid for which the student is eligible (e.g., 15000).

**Exported**

Display only - the date (mm/dd/yyyy) the loan was exported.

**Family Contr**

Optional - the amount of the student's Expected Family Contribution (EFC) (e.g., 3000).

**Guarantor**

Optional - a code indicating the service provider of the financial aid loan (e.g., AK for USA Funds). Use **Table Lookup** for a list of valid options.

**Note:** The Guarantor field is only used for CommonLine loans.

**In Default**

Optional - Y (Yes) or N (No) indicating whether the parent borrower is in default on any other federal loans.

**Lender ID/EFT**

Optional - consists of two fields. The first field is the identification number of the bank making the CommonLine PLUS Loan (e.g., 200998). The second field is Y (Yes) or N (No) indicating whether the bank offers EFT (Electronic Funds Transfer).

**Lic#**

Optional - the parent borrower's driver's license number (e.g., OH598219L).

**Orig Fee Pct**

Optional - the percentage charged by the service provider for the financial aid loan (e.g., 4.200).

**Outstanding**

Optional - Y (Yes) or N (No) indicating whether the parent borrower has any outstanding federal loans.

**Pay Interest**

Optional - Y (Yes) or N (No) indicating whether the borrower intends to pay interest while the student is in school.

**References**

Optional - Y (Yes) or N (No) indicating whether the parent borrower's references have been checked.

### Request Amt

Optional - the gross amount requested for the financial aid loan (e.g., 5000.00).

### Signed

Optional - Y (Yes) or N (No) indicating whether the parent borrower has signed the financial aid loan application. The date (mm/dd/yyyy) of the signed loan application appears to the right if the response is Y.

### Stat/Date

Optional - A code indicating the status of the Parent Loan currently displayed (e.g., X for Exported). Use **Table Lookup** for a list of valid codes. The description of the code appears below the field. The date (mm/dd/yyyy) of the current status of the loan application appears to the right of the field. For a detailed definition of the loan status codes, see *Loan Status Codes* and *Disbursement Status Codes* at the end of this section.

## Example (2 of 2)

Following is an example of the Parent Loans (PLUS) screen (2 of 2).

The screenshot shows a window titled "Loan Tracking Entry - ID Query" with a menu bar (File, Edit, Commands, Help) and a toolbar. The main area displays the following information:

**ID:** 5061575 Dominguez, Joseph      **SSN:** 421-65-8116      **Cur:** 1  
**Prog:** UNDC **Major:** ACC **Acst:** ACPT **Start:** FA 2000 **Grad:** FA 2002 **Num:** 1

Originator... COMMON CommonLine      UniqID.. 9999990000U93S001  
Aid Year.... 0001      Period.. 3Q FALL 00 - SPR-SUM 01  
Loan Type.... 03 CommonLine PLUS Loan      BegEnd.. 03/03/2000 - 07/15/2001  
Grade Level.. 1 1st Year (freshman)      Requested Service.... CR

----- ADDITIONAL BORROWER (PARENT) INFORMATION -----  
ID..... 5039846      Name.. Karen      Bartmess  
SSN..... 485-93-4059      Addr.. 234 Bartmess Avenue  
Phone... 513-596-3894      Cincinnati      OH 45249 0000  
Employer Name...      Phone....

----- STUDENT'S INFORMATION (PLUS LOANS ONLY) -----  
Citizenship.....      SSN.. 421-65-8116  
Alien Reg No....      Name.. Joseph      Dominguez  
Date of Birth... 02/03/1982      Addr.. 5824 Mountain Jack Road  
Signed Loan.....  
In Default.....      Sacramento      CA 95814 0000

## Segments (2 of 2)

The Parent Loans (PLUS) screen (2 of 2) is divided into four segments:

- The Header segment provides ID information about the selected student.
- The upper segment provides PLUS Loan information about the selected student.
- The Additional Borrower (Parent) Information segment provides address and identification information about the parent associated with the selected student.
- The Student's Information (PLUS Loans Only) segment provides address and identification information about the selected student for the current financial aid PLUS Loan record.

## Fields on the Header Segment (2 of 2)

The following fields appear on the Header segment of the Parent Loans (PLUS) screen (2 of 2).

**Note:** The system maintains all fields, which are display-only.

**ACST**

A code identifying the student's current academic status. Valid codes are:

- Blank (No academic status yet)
- ACPT (Full acceptance)
- ALOA (Academic leave of absence)
- CANC (Student cancelled registration)
- CD (Conditional acceptance)
- FULL (Fully admitted/enrolled)
- GRAD (Graduate student)
- PB (Academic probation)
- VW (Voluntary withdrawal)

**Cur**

The current loan being viewed (e.g., 1 for first).

**Grad**

The session and year the student plans to graduate (e.g., FA 2002).

**ID**

The number used to identify the student in the CX database (e.g., 5061575). The student's name appears to the right in last, first, middle format (e.g., Dominguez, Joseph).

**Major**

A code identifying the student's intended major (e.g., ACC for Accounting).

**Num**

The total number of loans listed for this student (e.g., 1).

**Prog**

A code identifying the academic program for which you want to process loan information (e.g., UNDG for Undergraduate).

**SSN**

The student's social security number (e.g., 421-65-8116).

**Start**

The beginning session and year for which the student is enrolled (e.g., FA 2000).

**Fields on the Upper Segment (2 of 2)**

The following fields appear on the upper segment of the Parent Loans (PLUS) screen (2 of 2).

**Aid Year**

Required - the financial aid award year in which the loan period begins (e.g., 0001 for 2000-2001). Use **Table Lookup** for list of valid values.

**BegEnd**

Required - the financial aid loan period beginning date and ending date (e.g., 03/03/2000-07/15/2001).

**Grade Level**

Required - a code indicating the student's grade level (e.g., 1 for first year freshman). A description of the grade level appears to the right. Use **Table Lookup** for a list of valid values.

**Loan Type**

Required - a code indicating the type of loan requested (e.g., 03 for CommonLine PLUS Loan). A description of the loan type appears to the right. Use **Table Lookup** for a list of valid values.

**Originator**

Required - a code indicating whether the loan service provider is CommonLine (COMMON), Direct Lending (DIRECT), or Key Alternate (KEY). The description of the service provider appears to the right.

**Period**

Required - a code indicating the beginning and ending session of the loan period (e.g., 3Q for Fall 2000 to Spring/Summer 2001). Use **Table Lookup** for a list of valid values.

**Requested Service**

Optional - a code identifying the type of request to process (e.g., CR for certified). Use **Table Lookup** for a list of valid codes.

**Note:** The Requested Service field is only used for CommonLine loans.

**UniqID**

Display only - a unique number, created by CX, to send to the service provider for the loan (e.g., 9999990000U93S001).

**Fields on the Additional Borrower (Parent) Information Segment**

The following fields appear on the Additional Borrower (Parent) Information segment of the Parent Loans (PLUS) screen (2 of 2). All fields are optional.

**Addr**

The street name and number of the parent's permanent address (e.g., 234 Bartmess Avenue). This field consists of two lines.

**(City)**

This field is located below the Address field. The city of the parent's permanent address (e.g., Cincinnati).

**Employer Name**

The name of the parent's employer.

**ID**

The number used to identify the parent in the CX database (e.g., 5039846). Use **Table Lookup** to perform an ID Query to find this information. If the referral does not have an ID number (e.g., it is not in the database), leave this field blank.

**Name**

The parent's name in the CX database in first, middle, last format (e.g., Karen Bartmess).

**Phone**

The phone number at the parent's permanent residence (e.g., 513-596-3894).

**Phone (Employer)**

The phone number of the parent's employer.

**SSN**

The parent's social security number (e.g., 485-93-4059).

**(State)**

This field is located to the right of the (City) field. A code indicating the state of the parent's permanent address (e.g., OH for Ohio). Use **Table Lookup** for a list of valid codes.

**(Zip Code)**

This field is located to the right of the (State) field. The zip code of the parent's permanent address (e.g., 45249 0000).

### Fields on the Student's Information (PLUS Loans Only) Segment

The following fields appear on the Student's Information (PLUS Loans Only) segment of the Parent Loans (PLUS) screen (2 of 2). All fields are optional.

#### **Addr**

The street name and number of the student's permanent address (e.g., 5824 Mountain Jack Road). This field consists of two lines.

#### **Alien Reg No**

If the student is other than a US citizen or US national, the student's nine-digit alien registration number.

#### **Citizenship**

A code indicating the citizenship of the student. Use **Table Lookup** for a list of valid codes.

#### **(City)**

This field is located below the Address field. The city of the student's permanent address (e.g., Sacramento).

#### **Date of Birth**

The student's date (mm/dd/yyyy) of birth.

#### **In Default**

Y (Yes) or N (No) indicating whether the student is in default on any other federal loans.

#### **Name**

The name of the student in first, middle, last format (e.g., Joseph Dominguez).

#### **Signed Loan**

Y (Yes) or N (No) indicating whether the student has signed the financial aid loan application. The date (mm/dd/yyyy) of the signed loan application appears to the right if the response is Y.

#### **SSN**

The student's social security number (e.g., 421-65-8116).

#### **(State)**

This field is located to the right of the (City) field. A code indicating the state of the student's permanent address (e.g., CA for California). Use **Table Lookup** for a list of valid codes.

#### **(Zip Code)**

This field is located to the right of the (State) field. The Zip code of the student's permanent address (e.g., 95814 0000).

### Commands

The following list describes the commands you can execute from the Parent Loans (PLUS) screens.

**Note:** You can use a specific command only when it appears on the current command line, toolbar, menu, or when it is black (not dimmed) on the list that appears when you select **Commands** from the menu bar. Also, you must have the necessary database permission to use that command.

#### **Add**

Adds a row to the active database table.

#### **Cancel**

In Update mode - does one or all of the following without saving any of the field entries you have made:

- Backs out of the current command
- Returns to the previous command
- Exits from the current screen

**Certify**

Enables the financial aid administrator to certify that information on the financial aid loan application is correct.

**Change**

Enables the financial aid administrator to modify loan information after the loan has been exported to the loan service provider. This identifies the Loan record as a change transaction file for export to the loan service provider. (Not currently used.)

**Close**

Enables you to exit from the current screen or window.

**Disbursements**

Accesses the Loan Tracking Entry (Disbursements) window enabling you to update the borrower's awarded aid and the amount of each award that has been disbursed in total and for each session.

**External**

Enables the financial aid administrator to import loans that have been created externally.

**Finish**

In Update mode - saves your field entries when you have completed your data entry or selection and want to continue.

**History**

Accesses the Loan Tracking Entry (History) window enabling you to view the status history of the current loan, the date and time the status was entered, and the name and ID of the individual who entered the information.

**Lookup**

Accesses a Table Lookup window listing valid codes or values from which you can choose.

**Next**

Shows the next record in the current list.

**Previous**

Shows the previous record in the current list.

**Screen**

Enables you to move to another screen of data.

**Update**

Changes a row in the active database table.

# Post Loans To Student Acct Screen

## Purpose

The Post Loans to Student Acct screen is a parameters screen that enables you to automatically post financial aid loan disbursements, received via EFT, to student accounts.

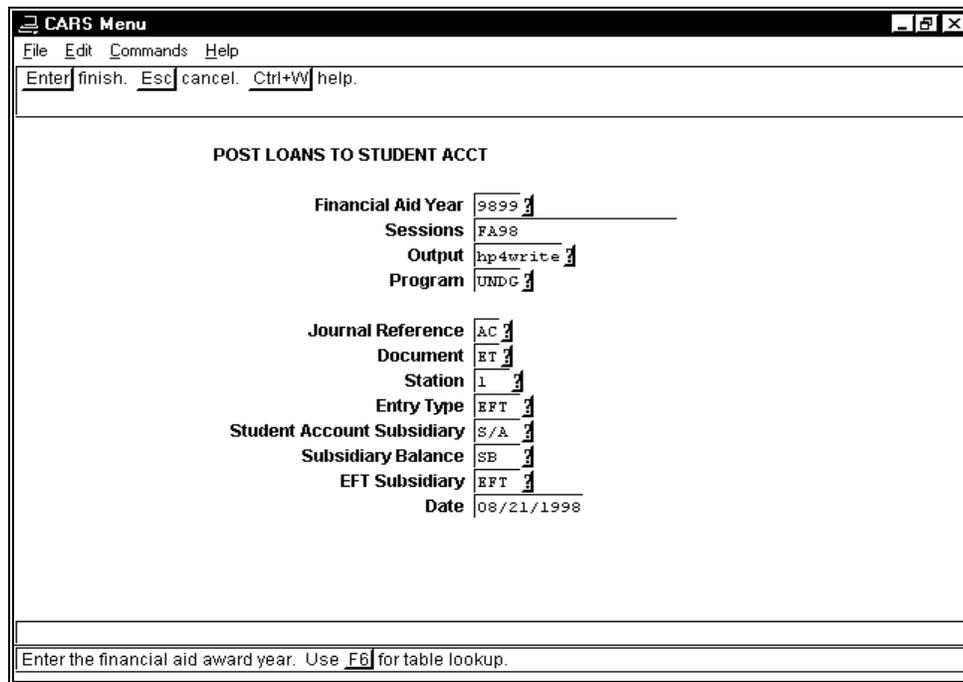
## Access

Access the Post Loans to Student Acct screen by selecting the following, beginning at the Student Management: Financial Aid Main menu:

1. Loan Tracking.
2. Post Loans to Student Acct

## Example

Following is an example of the Post Loans to Student Acct screen.



CARS Menu

File Edit Commands Help

Enter finish. Esc cancel. Ctrl+W help.

**POST LOANS TO STUDENT ACCT**

Financial Aid Year	9899
Sessions	FA98
Output	hp4write
Program	UNDC
Journal Reference	A/C
Document	ET
Station	1
Entry Type	EFT
Student Account Subsidiary	S/A
Subsidiary Balance	SB
EFT Subsidiary	EFT
Date	08/21/1998

Enter the financial aid award year. Use F6 for table lookup.

## Fields on the Post Loans To Student Acct Screen

The following fields appear on the Post Loans To Student Acct screen.

### Date

Optional - the effective date (mm/dd/yyyy) of the journal to be posted. The system defaults to the current date.

### Document

Optional - the EFT Document code (e.g., ET for Loan Tracking EFT wire). Use **Table Lookup** for a list of valid codes.

### EFT Subsidiary

Optional - a code indicating the subsidiary in which EFT rosters are posted (e.g., EFT for Loan Tracking EFT wire). Use **Table Lookup** for a list of valid codes.

#### **Entry Type**

Optional - a code indicating the entry type to post EFT disbursements (e.g., EFT for Loan Tracking EFT wire). Use **Table Lookup** for a list of valid codes.

#### **Financial Aid Year**

Required - the financial aid award year for which you wish to post financial aid loans to student accounts (e.g., 9899 for 1998-1999). Use **Table Lookup** for a list of valid codes.

#### **Journal Reference**

Optional - a code indicating the journal type to post EFT disbursements (e.g., AC for Accounting Journal). Use **Table Lookup** for a list of valid codes.

#### **Output**

Required - the printer or file location for compliance output (e.g., hp4write). Use **Table Lookup** for a list of valid codes.

#### **Program**

Optional - a code identifying the academic program for which you wish to post financial aid loans to student accounts (e.g., UNDG for Undergraduate). Use **Table Lookup** for a list of valid codes.

#### **Sessions**

Required - a code indicating the session(s) for which you wish to post financial aid loans to student accounts (e.g., FA98 for Fall 1998). Use **Table Lookup** for a list of valid codes.

**Note:** You can enter up to four Session codes to be processed. Use commas to separate each code.

#### **Station**

Required - the EFT station number (e.g., 1). Use **Table Lookup** for a list of valid codes.

#### **Student Account Subsidiary**

Optional - the code indicating in which student account subsidiary you wish to post financial aid loans (e.g., S/A for Student Accounts). Use **Table Lookup** for a list of valid codes.

#### **Subsidiary Balance**

Required - the code indicating in which subsidiary balance column you wish to post financial aid loans (e.g., SB for Session Billing). Use **Table Lookup** for a list of valid codes.

**Note:** The Subsidiary Balance codes that are available depend upon the selected Student Account Subsidiary code.

### **Commands**

The following list describes the commands you can execute from the Post Loans to Student Acct screen.

**Note:** You can use a specific command only when it appears on the current command line, toolbar, menu, or when it is black (not dimmed) on the list that appears when you select **Commands** from the menu bar. Also, you must have the necessary database permission to use that command.

#### **Cancel**

Does one or all of the following without saving any of the field entries you have made:

- Backs out of the current command
- Returns to the previous command
- Exits from the current screen

#### **Finish**

Saves your field entries when you have completed your data entry or selection and want to continue.

**Help**

Displays a brief description of the screen.



- The header segment provides ID information about the selected student.
- The upper segment provides Stafford Loan information about the selected student.
- The lower segment provides specific information about the student borrower and the loan status.

### Fields on the Header Segment (1 of 2)

The following fields appear on the header segment of the Stafford Loans screen (1 of 2).

**Note:** The system maintains all fields, which are display-only.

#### ACST

A code identifying the student's current academic status. Valid codes are:

- Blank (No academic status yet)
- ACPT (Full acceptance)
- ALOA (Academic leave of absence)
- CANC (Student cancelled registration)
- CD (Conditional acceptance)
- FULL (Fully admitted/enrolled)
- GRAD (Graduate student)
- PB (Academic probation)
- VW (Voluntary withdrawal)

#### Cur

The current loan being viewed (e.g., 1 for first).

#### Grad

The session and year the student plans to graduate.

#### ID

The number used to identify the student in the CX database (e.g., 5039617). The student's name appears to the right in last, first, middle format (e.g., Travis, Kyle W.).

#### Major

A code identifying the student's intended major (e.g., UNDE for Undecided).

#### Num

The total number of loans listed for this student (e.g., 3).

#### Prog

A code identifying the academic program for which you want to process loan information (e.g., UNDG for Undergraduate).

#### SSN

The student's social security number (e.g., 333-45-9999).

#### Start

The beginning session and year for which the student is enrolled (e.g., FALL 1997).

### Fields on the Upper Segment (1 of 2)

The following fields appear on the upper segment of the Stafford Loans screen (1 of 2).

#### Aid Year

Required - the financial aid award year in which the loan period begins (e.g., 9899 for 1998-1999). Use **Table Lookup** for list of valid values.

#### BegEnd

Required - the financial aid loan period beginning date and ending date (e.g., 09/02/1998-06/15/1999).

#### Grade Level

Required - a code indicating the student's grade level (e.g., 01 for first year, never attended college). A description of the grade level appears to the right. Use **Table Lookup** for a list of valid values.

#### **Loan Type**

Required - a code indicating the type of loan requested (e.g., S for Direct Lending Stafford Loan). A description of the loan type appears to the right. Use **Table Lookup** for a list of valid values.

#### **Originator**

Required - a code indicating whether the loan service provider is CommonLine (COMMON) or Direct Lending (DIRECT). The description of the service provider appears to the right. Use **Table Lookup** for a list of valid values.

#### **Period**

Required - a code indicating the beginning and ending session of the loan period (e.g., FS for Fall 1998 to Spring 1999). Use **Table Lookup** for a list of valid values.

#### **Requested Service**

Optional - a code identifying the type of request to process (e.g., CR for certified). Use **Table Lookup** for a list of valid codes.

**Note:** The Requested Service field is only used for CommonLine loans.

#### **UniqID**

Display only - a unique number, created by CX, to send to the service provider for the loan (e.g., 333459999S99999999001).

### **Fields on the Lower Segment (1 of 2)**

The following fields appear on the lower segment of the Stafford Loans screen (1 of 2).

#### **Alien Reg No**

Optional - if the student borrower is other than a US citizen or US national, the student's nine-digit alien registration number.

#### **Allow EFT**

Optional - Y (Yes) or N (No) indicating whether the student wishes to allow loan proceeds to be transferred electronically.

**Note:** The Allow EFT field is only used for CommonLine loans.

#### **Antic Grad**

Optional - the anticipated date (mm/dd/yyyy) of the student's graduation.

#### **Approved Amt**

Optional - this field displays if the current loan is a Direct Lending Loan (either Stafford or Unsubsidized). The gross amount approved for the Direct Lending Loan currently displayed (e.g., 2625.00).

#### **Approved STAF**

Optional - this field displays if the current loan is a CommonLine STAF (Stafford) or CommonLine STAF/UNSB (one Stafford and one Unsubsidized) Loan. The gross amount approved for the CommonLine Stafford Loan currently displayed.

#### **Approved UNSB**

Optional - this field displays if the current loan is a CommonLine UNSB (Unsubsidized) or CommonLine STAF/UNSB (one Stafford and one Unsubsidized) Loan. The gross amount approved for the CommonLine Unsubsidized Loan currently displayed.

#### **Attend Cost**

Optional - the student's cost of attendance (e.g., 17000).

**Borrower ID**

Display only - the number assigned to the student borrower (e.g., 5039617).

**Certified**

Display only - the date (mm/dd/yyyy) the loan was certified.

**Citizenship**

Optional - a code indicating the citizenship of the borrower (e.g., 1 for U.S. citizen). A list of valid codes appears in the Comment line.

**Date of Birth**

Optional - the birth date (mm/dd/yyyy) of the student borrower.

**Defer Pmt**

Optional - Y (Yes) or N (No) indicating whether the student requests that loan payments be deferred while he or she is in school.

**Note:** The Defer Pmt field is only used for CommonLine loans.

**Dependent**

Optional - a code indicating the student's dependency status (e.g., D for Dependent). Use **Table Lookup** for a list of valid codes.

**Driver Lic St**

Optional - a code indicating the state in which the student borrower has a drivers' license (e.g., OH for Ohio). Use **Table Lookup** for a list of valid codes.

**Enroll Stat**

Optional - a code indicating the student's enrollment status. A list of valid codes appears in the Comment line.

**Est Aid**

Optional - the estimated amount of financial aid for which the student is eligible (e.g., 5000).

**Exported**

Display only - the date (mm/dd/yyyy) the loan was exported.

**Family Contr**

Optional - the amount of the student's Expected Family Contribution (EFC) (e.g., 200).

**Guarantor**

Optional - a code indicating the service provider of the financial aid loan. Use **Table Lookup** for a list of valid options.

**Note:** The Guarantor field is only used for CommonLine loans.

**In Default**

Optional - Y (Yes) or N (No) indicating whether the student borrower is in default on any other federal loans.

**Note:** The In Default field is only used for CommonLine loans.

**Lender ID/EFT**

Optional - the identification number of the bank making the CommonLine Loan. Y or N indicating whether or not the bank offers EFT (Electronic Funds Transfer) appears to the right of the field.

**Lic#**

Optional - the student borrower's driver's license number (e.g., OJ9485875).

**Orig Fee Pct**



## Segments (2 of 2)

The Stafford Loans screen (2 of 2) is divided into three segments:

- The header segment provides ID information about the selected student.
- The upper segment provides Stafford Loan information about the selected student.
- The Additional Borrower (Student) Information segment provides address and identification information about the selected student for the current financial aid Stafford Loan record.

## Fields on the Header Segment (2 of 2)

The following fields appear on the header segment of the Stafford Loans screen (2 of 2).

**Note:** The system maintains all fields, which are display-only.

### ACST

A code identifying the student's current academic status. Valid codes are:

- Blank (No academic status yet)
- ACPT (Full acceptance)
- ALOA (Academic leave of absence)
- CANC (Student cancelled registration)
- CD (Conditional acceptance)
- FULL (Fully admitted/enrolled)
- GRAD (Graduate student)
- PB (Academic probation)
- VW (Voluntary withdrawal)

### Cur

The current loan being viewed (e.g., 1 for first).

### Grad

The session and year the student plans to graduate.

### ID

The number used to identify the student in the CX database (e.g., 5039617). The student's name appears to the right in last, first, middle format (e.g., Travis, Kyle W.).

### Major

A code identifying the student's intended major (e.g., UNDE for Undecided).

### Num

The total number of loans listed for this student (e.g., 3).

### Prog

A code identifying the academic program for which you want to process loan information (e.g., UNDG for Undergraduate).

### SSN

The student's social security number (e.g., 333-45-9999).

### Start

The beginning session and year for which the student is enrolled (e.g., FALL 1997).

## Fields on the Upper Segment (2 of 2)

The following fields appear on the upper segment of the Stafford Loans screen (2 of 2).

### Aid Year

Required - the financial aid award year in which the loan period begins (e.g., 9899 for 1998-1999). Use **Table Lookup** for list of valid values.

### BegEnd

Required - the financial aid loan period beginning date and ending date (e.g., 09/02/1998-06/15/1999).

**Grade Level**

Required - a code indicating the student's grade level (e.g., 01 for 1st year, never attended college). A description of the grade level appears to the right. Use **Table Lookup** for a list of valid values.

**Loan Type**

Required - a code indicating the type of loan requested (e.g., S for Direct Lending Stafford Loan). A description of the loan type appears to the right. Use **Table Lookup** for a list of valid values.

**Originator**

Required - a code indicating whether the loan service provider is CommonLine (COMMON) or Direct Lending (DIRECT). The description of the service provider appears to the right.

**Period**

Required - a code indicating the beginning and ending session of the loan period (e.g., FS for Fall 1998 to Spring 1999). Use **Table Lookup** for a list of valid values.

**Requested Service**

Optional - a code identifying the type of request to process (e.g., CR for certified). Use **Table Lookup** for a list of valid codes.

**Note:** The Requested Service field is only used for CommonLine loans.

**UniqID**

Display only - a unique number, created by CX, to send to the service provider for the loan (e.g., 333459999S99999999001).

**Fields on the Additional Borrower (Student) Information Segment**

The following fields appear on Additional Borrower (Student) Information segment of the Stafford Loans screen (2 of 2). All fields are optional.

**Addr**

The street name and number of the student's permanent address (e.g., 958 Rose Dr.). This field consists of two lines.

**(City)**

This field is located below the Address field. The city of the student's permanent address (e.g., Cincinnati).

**ID**

The number used to identify the student in the CX database (e.g., 5039617).

**Name**

The name of the student in first, middle, last format (e.g., Kyle Travis).

**Phone**

The phone number at the student's permanent residence (e.g., 513-533-8577).

**SSN**

The student's social security number (e.g., 333-45-9999).

**(State)**

This field is located to the right of the (City) field. A code indicating the state of the student's permanent address (e.g., OH for Ohio). Use **Table Lookup** for a list of valid codes.

**(Zip Code)**

This field is located to the right of the (State) field. The zip code of the student's permanent address (e.g., 45208 0000).

## Commands

The following list describes the commands you can execute from the Stafford Loans screen.

**Note:** You can use a specific command only when it appears on the current command line, toolbar, menu, or when it is black (not dimmed) on the list that appears when you select **Commands** from the menu bar. Also, you must have the necessary database permission to use that command.

### Add

Adds a row to the active database table.

**Note:** To create Stafford loans for the 2000-2001 financial aid award year and beyond, use the MPN (Master Promissory Note) process. For more information on the MPN process see *Adding/Updating Stafford Loan Information Using MPN (Master Promissory Note)* in this manual.

### Cancel

In Update mode - does one or all of the following without saving any of the field entries you have made:

- Backs out of the current command
- Returns to the previous command
- Exits from the current screen

### Certify

Enables the financial aid administrator to certify that information on the financial aid loan application is correct.

### Change

Enables the financial aid administrator to modify loan information after the loan has been exported to the loan service provider. This identifies the Loan record as a change transaction file for export to the loan service provider. (Not currently used.)

### Close

Enables you to exit from the current screen or window.

### Disbursements

Accesses the Loan Tracking Entry (Disbursements) window enabling you to update the borrower's awarded aid and the amount of each award that has been disbursed in total and for each session.

### External

Enables the financial aid administrator to import loans that have been created externally.

### Finish

In Update mode - saves your field entries when you have completed your data entry or selection and want to continue.

### History

Accesses the Loan Tracking Entry (History) window enabling you to view the status history of the current loan, the date and time the status was entered, and the name and ID of the individual who entered the information.

### Lookup

Accesses a Table Lookup window listing valid codes or values from which you can choose.

### Next

Shows the next record in the current list.

**Previous**

Shows the previous record in the current list.

**Screen**

Enables you to move to another screen of data.

**Update**

Changes a row in the active database table.

## Loan Status Codes

### Introduction

The Loan Status field appears on each of the Loan screens (e.g., MPN, PLUS, Alternate, and Stafford) and uses loan status codes to track the current status of the Loan record. The values for the loan status codes are defined in the Loan Status table (*loanstat\_table*). For more information on the Loan Status table, see the *Financial Aid Tables and Records* section in the *Financial Aid Technical Manual*.

Jenzabar recommends that you allow the *loans* program to automatically assign the loan status to prevent errors in loan processing. However, you can manually assign this status if a specific Loan record requires special attention.

**CAUTION:** Jenzabar maintains the Loan Status table and strongly recommends that your institution *not* make any modifications to this table. Loan processing errors can occur.

### Loan Status Code Chart

The following chart shows a detailed description of each loan status code.

Sequence	Loan Status * = most commonly assigned statuses	Loan Status Type	Disbursement Status
10	E - Entered on CX*	a - active	E - Generated disbursements
15	T - Terminated record*	i - inactive	T - Terminated
20	F - Certified on CX*	a - active	
30	X - Exported from CX*	a - active	
35	S - Reprint request pre-guarantee	a - active	
35	U - Terminate request pre-guarantee*	a - active	
40	A - Initially processed*	a - active	
40	C - School certification requested	a - active	
40	D - Denied/reject/incomplete	i - inactive	G - Cancel by guarantor
40	I - Pending further approval	p - pending	
40	N - Response to reprint	a - active	
40	P - Pending processing	p - pending	R - Pending reissue
45	W - Modified, pre-guarantee*	a - active	
50	B - Guaranteed, disbursable*	a - active	A - Approve for disbursement
50	G - Guaranteed*	a - active	A - Approve for disbursement
60	M - Provider modified after guaranteed*	a - active	
65	J - Cancel request, pre-disbursement*	a - active	C - Cancelled, pre-disbursement
67	K - Reinstatement, pre-disbursement	a - active	A - Approve for disbursement
70	Y - Disbursed*	a - active	D - Disbursed
80	V - Released to student*	a - active	V - Released to student
100	Z - Completed*	a - active	

### Loan Status Code Description

The loan status codes are maintained by Jenzabar and are assigned according to the following conditions:

- Sequential order

- Status type
- Relationship between the loan status and the disbursement status

## Sequence

Each loan status code is assigned a sequence number in order to identify the forward progression of each Loan record. For instance, when you create a Loan record, CX automatically assigns the loan a status code of E (Entered on CX), which is associated with the lowest loan status sequence number of 10. Loan status codes must always be assigned in a forward progression based on the status sequence number. However, not all codes need to be assigned. For example, it is common for a Loan record to automatically move from a sequence number of 10 (loan status of E - Entered on CX) to a sequence number of 20 (loan status of F - Certified on CX). However, you cannot reverse the order and assign a Loan record a status code that has a lower sequence number. For example, if a Loan record has a current status of B (Guaranteed, disbursable), which has a status sequence number of 50, you cannot modify the Loan record to a status of A (Initially processed), which has a status sequence number of 40.

## Status Type

Each loan status code is also assigned one of the following three status types:

- a (active) - the loan is active. You may modify, certify, export, guarantee, etc. this Loan record.
- p (pending) - the loan is on hold. You cannot process this Loan record any further until certain actions are taken.
- i (inactive) - the loan is either cancelled or denied. You cannot continue to process this Loan record. Once a Loan record is assigned an inactive status code, it cannot be re-assigned a status code that is active. For example, if a Loan record has been given a status of (T)erminated, which is an inactive status type, you cannot update the loan status to F (Certified on CX), which is an active status type.

## Loan Status and Disbursement Status Relationships

You must verify whether the loan status code on the Loan record has a corresponding disbursement status code on the Disbursement record. For example, when the service provider assigns the selected Loan record a loan status code of B (Guaranteed, disbursable), the Disbursement record automatically receives a disbursement status code of A (Approve for disbursement).

**CAUTION:** CX strongly recommends that you do not modify either the Loan Status code or the Disbursement Status code that is automatically assigned to the Loan record. For instance, if the Loan record is assigned a loan status of E (Entered on CX) and you attempt to assign the Disbursement record a disbursement status of A (Approve for disbursement), loan processing errors can occur because there is no relationship between these two status codes.

**Note:** For more information on how loan status codes are assigned throughout the Financial Aid Loan process, see the *Financial Aid Loan* section in the *Financial Aid Technical Manual*.

## Rules for the Assignment of Loan Status Codes

Each loan status code is assigned a sequence number to ensure the proper assignment of statuses to Loan records. The sequence numbers cause the enforcement of the following rules:

- Loan statuses must always progress forward.
- A particular Loan record can skip certain statuses.
- A Loan record with a Pending loan status cannot assume a different loan status until further processing occurs.
- A Loan record that is inactive cannot be made active

### **Example of a Loan Status Code Usage**

When you create a new Loan record, CX automatically assigns it a loan status code of E (the code for newly entered records) which is associated with the sequence number 10. If this Loan record remains active and continues through the normal processes, the loan status will change to F (the code for certified records) which is associated with the sequence number of 20 and then to X (the code for exported records) which is associated with the sequence number of 30. After that, the loan status cannot be changed to T (the code for a record that is terminated), since the T status has a sequence number of 15; it can, however be changed to any status associated with a sequence number greater than or equal to 35. If this Loan record is assigned a status of P (the code for pending processing) which is a pending status type, no change can be made to the loan status code until further processing occurs. If this Loan record is assigned a status of D (the code for denied/rejected/incompl) which is an inactive status type, the status of the loan cannot change again.

## Disbursement Status Code

### Introduction

The Disbursement Status field appears on the Loan Tracking Entry (Disbursements) window and is used to track the current status of the Disbursement record. The values for the disbursement status codes are defined in the Disbursement Status table (*disbstat\_table*). For more information on the Disbursement Status table, see the *Financial Aid Tables and Records* section in the *Financial Aid Technical Manual*.

Jenzabar recommends that you allow the *loans* program to automatically assign the disbursement status to prevent errors in loan processing. However, you can manually assign this status if a specific Disbursement record requires special attention.

**CAUTION:** Jenzabar maintains the Disbursement Status table and strongly recommends that your institution *not* make any modifications to this table. Loan processing errors can occur.

### Disbursement Status Code Chart

The following chart shows a detailed description of each disbursement status code.

Sequence	Disbursement Status * = most commonly assigned statuses	Disbursement Status Type	Aid Status
5	E - Generated disbursements*	p - pending	I - Estimate
10	T - Terminated*	i - inactive	N - Nullify
20	A - Approve for disbursement	a - active	A - Actual
30	B - Cancel by borrower	i - inactive	R - Reject
30	G - Cancel by guarantor	i - inactive	N - Nullify
30	S - Cancel by school	i - inactive	N - Nullify
35	C - Cancelled, pre-disbursement	i - inactive	N - Nullify
50	D - Disbursed*	a - active	A - Actual
70	F - Full return, post-disbursement	i - inactive	R - Reject
70	P - Partial cancel post-disbursement	i - inactive	-----
80	R - Pending reissue	p - pending	P - Pending
90	V - Released to student*	a - active	A - Actual

### Disbursement Status Code Description

The disbursement status codes are maintained by Jenzabar and are assigned according to the following conditions:

- Sequential order
- Status type
- Relationship between the disbursement status and the aid status

### Sequence

Each disbursement status code is assigned a sequence number in order to identify the forward progression of each Disbursement record. For instance, when you create an initial Disbursement record using the Loan Tracking Entry (Disbursements) window, CX automatically assigns the disbursement a status code of E (Generated disbursements). The disbursement status code E (Generated disbursements) is associated with the lowest disbursement status sequence number of 5. Disbursement status codes must always be assigned in a forward progression based on the

status sequence number. However not all codes need to be assigned. For example, it is common for a Disbursement record to automatically move from a sequence number of 5, which is a disbursement status of E (Generated Disbursements), to a sequence number of 20, which is a disbursement status of A (Approve for Disbursement). However, you cannot reverse the order and assign a Disbursement record a status code that has a lower sequence number. For example, if a Disbursement record has a current status of D (Disbursed), which has a status sequence number of 50, you cannot modify the Loan record to a status of C (Cancelled, pre-disbursement), which has a status sequence number of 35.

## Status Type

Each disbursement status code is also assigned one of the following three status types:

- a (active) - the Disbursement record is active and will be processed along with its associated Loan record.
- p (pending) - the Disbursement record is on hold. You cannot process this Disbursement record any further until certain actions are taken.
- i (inactive) - the Disbursement record is either cancelled or denied. You cannot continue to process this Disbursement record. Once a Disbursement record is assigned an inactive status code, it cannot be re-assigned a status code that is active. For example, if a Disbursement record has been given a status of T (Terminated), which is an inactive status type, you cannot update the disbursement status to A (Approve for disbursement), which is an active status type.

## Disbursement Status and Aid Status Relationships

You must verify whether the disbursement status code on the Disbursement record (*loandisb\_rec*) has a corresponding aid status code on the Aid record (*aid\_rec*). For example, when CX assigns the selected Disbursement record a disbursement status code of E (Generated disbursements), the Aid record automatically receives an aid status code of I (estimate).

**CAUTION:** Jenzabar strongly recommends that you do not modify either the Disbursement Status code on the Loan Tracking Entry (Disbursements) window nor the Aid Status code that is automatically assigned to the Aid record. For instance, if the Disbursement record is assigned a disbursement status of E (Generated disbursements) on CX and you attempt to assign the corresponding Aid record an aid status of N (Nullify), loan processing errors can occur because there is no relationship between these two status codes.

## Rules for the Assignment of Disbursement Status Codes

Each disbursement status code is assigned a sequence number to ensure the proper assignment of statuses to Disbursement records. The sequence numbers cause the enforcement of the following rules:

- Disbursement statuses must always progress forward.
- A particular Disbursement record can skip certain statuses.
- A Disbursement record with a Pending disbursement status cannot assume a different disbursement status until further processing occurs.
- A Disbursement record that is inactive cannot be made active

## Example of a Disbursement Status Code Usage

When you create a new Disbursement record, CX automatically assigns it a disbursement status code of E (the code for newly generated disbursement records) which is associated with the sequence number 5. If this Disbursement record remains active and continues through the normal processes, the disbursement status will change to A (the code for approved records) which is associated with the sequence number of 20 and then to D (the code for disbursed records) which is associated with the sequence number 50. After that, the loan status cannot be

changed to T (the code for a record that is terminated), since the T status has a sequence number of 10; it can, however be changed to any status associated with a sequence number greater than or equal to 70. If this Disbursement record is assigned a status of R (the code for pending reissue) which is a pending status type, no change can be made to the disbursement status code until further processing occurs. If this Disbursement record is assigned a status of T (the code for a record that is terminated) which is an inactive status type, the status of the disbursement cannot change again.

# SECTION 3 - ADDING OR UPDATING FINANCIAL AID LOAN INFORMATION

## Overview

### Introduction

This section provides procedures to:

- Display a summary of all financial aid loans awarded to a particular student
- Select a loan type to display aid year, originator, service provider, need amounts, Expected Family Contribution (EFC), and approved loan amount information for a specific student
- Add or update a student's financial aid award(s) and status(es)

### Before You Begin

Before you begin to use the following procedures for adding and updating Financial Aid Loan, remember:

- An ID record for the student must already exist on the system.
- The student has to complete the admission process, resulting in the creation of a Program Enrollment record for the student.
- A Need Analysis Form record for the student must already exist on the system. For more information, see the *Financial Aid Need Analysis User Guide* manual.
- Use the field descriptions in the *Using the Financial Aid Loan Screens* section of this guide when you complete the fields on the screens discussed in this section.

### Process

This list shows the general phases that take place before, during, and after adding and updating Financial Aid Loan information.

1. Access Financial Aid Loan and enter appropriate parameters for processing financial aid summary information.
2. Query to locate a student for whom you are creating or updating a Financial Aid Loan record.
3. Select the type of loan you wish to enter or update for a particular student.
4. Complete and save all field entries.

# Accessing Financial Aid Loan Information

## How to Access Financial Aid Loan Information

Follow these steps to access Financial Aid Loan information.

1. From the Student Management: Financial Aid Main menu, select the following:
  - **Loan Tracking**. The Financial Aid: Loan Tracking Main menu appears.
  - **Loan Tracking Entry**. The Loan Tracking Entry Parameters screen appears.
2. At the Loan Tracking Entry Parameters screen, enter the appropriate values as follows:
  - The Program code for which you want to access loans (e.g., UNDG for undergraduate). Use **Table Lookup** for a list of valid codes.
  - The Site code for your institution.
3. Select **Finish**. The Loan Tracking ID Query screen appears.
4. Do you know the student's ID or social security number?
  - If yes, enter the number in the ID field and select **Finish**.
  - If no, select **Query** to perform a query. For more information about how to perform queries, see *Locating and Entering Data in CX* in the *Getting Started User Guide* manual.

The Loan Summary screen appears for the selected student.

## Adding/Updating Stafford Loan Information

### How to Add Stafford Loan Information

Follow these steps to add Stafford Loan information.

**Note:** This process is not available after the 1999-2000 financial aid award year. To create Stafford loans for the 2000-2001 financial aid award year and beyond, use the MPN (Master Promissory Note) process. For more information on the MPN process see *Adding/Updating Stafford Loan Information Using MPN (Master Promissory Note)* in this section.

1. Access the Loan Summary screen for the desired student. For information on how to access the Financial Aid Loan Summary screen, see *Accessing Financial Aid Loan Information* in this section.
2. At the Loan Summary screen, select **Stafford** from the Commands menu.
  - A message window appears when CX does not locate an existing Stafford Loan record for the student. Select **Add** from the Message window. A new Stafford Loans screen (1 of 2) appears.
  - If the student already has an existing Stafford Loan record, the first Staf/Unsb Loans screen (1 of 2) appears. Select **Add** from the Commands menu. A new Stafford Loans screen (1 of 2) appears.

**Note:** If you wish to create a Stafford loan for the financial aid year 2000-2001 and beyond, a Message window appears when you select **Add** from the Commands menu indicating that your institution is configured to use Master Promissory Note (MPN). For more information on the MPN process see *Adding/Updating Stafford Loan Information Using MPN (Master Promissory Note)* in this section.

3. Enter the necessary information into the appropriate fields on the selected Staf/Unsb Loans screen (1 of 2). You must enter information in the following fields to create a Financial Aid Loan record for this student:
  - Originator
  - Aid Year
  - Loan Type
  - Period
  - Grade Level
  - BegEnd

**Note:** Once you complete the Period field, CX populates the BegEnd field automatically.

4. Select **Finish**. A new Stafford Loan record is created for the selected student.
5. Do you wish to update information on the current Stafford Loans screen (2 of 2)?
  - If yes, select **Screen** from the Commands menu. the Stafford Loans screen (2 of 2) appears. Select **Update** from the Commands menu and make the desired changes then select **Finish**. Go to step 6.
  - If no, go to step 6.
6. Do you wish to add another Stafford Loan record for this student?
  - If yes, select **Add** from the Commands menu and go back to step 3.
  - If no, select **Close** from the Commands menu. You are returned to the Loan Summary screen. CX displays the added loan on the student's Loan Summary screen.
7. Do you wish to continue to add Stafford Loan records for other students?

- If yes, go back to step 1.
- If no, select **Exit** from the Commands menu. A message appears asking if you are sure that you wish to exit.
  - If yes, select **Yes**. You are returned to the Financial Aid: Loan Tracking Main menu.
  - If no, select **No**. You are returned to the Loan Summary screen. Go back to step 1.

## How to Update Stafford Loan Information

Follow these steps to update Stafford Loan information.

**Note:** Use this process only for Stafford loans created prior to the 2000-2001 financial aid award year. To update Stafford loans for the 2000-2001 financial aid award year and beyond, use the MPN (Master Promissory Note) process. For more information on the MPN process see *Adding/Updating Stafford Loan Information Using MPN (Master Promissory Note)* in this section.

1. Access the Loan Summary screen for the desired student. For information on how to access the Financial Aid Loan Summary screen, see Accessing Financial Aid Loan Information in this section.
2. At the Loan Summary screen, select **Stafford** from the Commands menu.
3. Does the student already have an existing Stafford Loan record?
  - If yes, the first Staf/Unsb Loans screen (1 of 2) appears. Go to step 4.
  - If no, a message window appears indicating that your school is configured to use the Master Promissory Note process. Select **OK** to return to the Loan Summary screen. You will need to use the Master Promissory Note process to create a new Stafford loan for the student. For more information on adding a Stafford loan using the MPN process see *Adding/Updating Stafford Loan Information Using-MPN (Master Promissory Note)* in this section.
4. Do you wish to update the Loan record that is currently displayed?
  - If yes, go to step 5.
  - If no, select **Next** from the Commands menu until the desired Loan record is displayed. Go to step 5.
5. Select **Update** from the Commands menu and make the desired changes in the fields.
6. Do you wish to update information on the Stafford Loans screen (2 of 2) for this student?
  - If yes, select **Screen** from the Commands menu, make the desired changes in the fields, and select **Finish**. The changes you have made to the Stafford Loan record are saved.
  - If no, select **Finish**. The changes you have made to the selected Stafford Loan record are saved.
7. Do you wish to update another Stafford Loan record for this student?
  - If yes, select **Next** or **Previous** from the Commands menu until the desired Loan record is displayed. Go back to step 5.
  - If no, select **Close** from the Commands menu. You are returned to the Loan Summary screen. CX displays the added loan on the student's Loan Summary screen.
8. Do you wish to continue to update Stafford Loan records for other students?
  - If yes, go back to step 1.
  - If no, select **Exit** from the Commands menu. A message appears asking if you are sure that you wish to exit.
    - If yes, select **Yes**. You are returned to the Financial Aid: Loan Tracking Main menu.

- If no, select **No**. You are returned to the Loan Summary screen. Go back to step 1.

## Adding/Updating Stafford Loan Information Using MPN (Master-Promissory-Note)

### How to Add Stafford Loan Information Using MPN

Follow these steps to add Stafford Loan information using Master-promissory-note.

**Note:** Once your institution is configured to use Master-promissory-note, you must create all Stafford Loan records through the Master-promissory-note option. Use this process only for Stafford loans created for the 2000-2001 financial aid award year and beyond. To update Stafford loans created prior to the 2000-2001 financial aid award year, use the Stafford Loan process. For more information on the Stafford Loan process see *Updating Stafford Loan Information* in this section.

1. Access the Loan Summary screen for the desired student. For information on how to access the Financial Aid Loan Summary screen, see *Accessing Financial Aid Loan Information* in this section.
2. At the Loan Summary screen, select **Master-prom-note** from the Commands menu.
3. Does the student already have an existing Master-prom-note Loan record?
  - If yes, the first MPN Loans screen (1 of 2) appears. Select **Add** from the Commands menu. A new MPN Loans screen (1 of 2) appears.
  - If no, a message window appears indicating that the student does not have an MPN Loan record. Select **Add** from the Message window. A new MPN Loans screen (1 of 2) appears in Add mode.
4. Enter the necessary information into the appropriate fields on the MPN Loans screen (1 of 2). You must enter information in the following fields to create an MPN Financial Aid Loan record for this student:
  - Originator
  - Aid Year
  - Loan Type
  - Grade Level
  - Period
  - BegEnd
  - Requested Service
  - Serial Code
  - Delivery

**Note:** Once you complete the Period field, CX populates the BegEnd field automatically.
5. Select **Finish**. A new Financial Aid MPN Loan record is created for the selected student.
6. Do you wish to update information on the current MPN Loans screen (2 of 2)?
  - If yes, select **Screen** from the Commands menu. The MPN Loans screen (2 of 2) appears. Select **Update** from the Commands menu and make the desired changes then select **Finish**. Go to step 7.
  - If no, go to step 7.
7. Do you wish to add another Financial Aid MPN Loan record for this student?
  - If yes, select **Add** from the Commands menu and go back to step 4.
  - If no, select **Close** from the Commands menu. You are returned to the Loan Summary screen. CX displays the added loan on the student's Loan Summary screen.
8. Do you wish to continue to add Financial Aid MPN Loan records for other students?

- If yes, go back to step 1.
- If no, select **Exit** from the Commands menu. A message appears asking if you are sure that you wish to exit.
  - If yes, select **Yes**. You are returned to the Financial Aid: Loan Tracking Main menu.
  - If no, select **No**. You are returned to the Loan Summary screen. Go back to step 1.

## How to Update Stafford Loan Information Using MPN

Follow these steps to update existing MPN Loan record information.

**Note:** Use this process only for Stafford loans created for the 2000-2001 financial aid award year and beyond. To update Stafford loans created prior to the 2000-2001 financial aid award year, use the Stafford Loan process. For more information on the Stafford Loan process see *Updating Stafford Loan Information* in this section.

1. Access the Loan Summary screen for the desired student. For information on how to access the Financial Aid Loan Summary screen, see *Accessing Financial Aid Loan Information* in this section.
2. At the Loan Summary screen, select **Master-prom-note** from the Commands menu.
3. Does the student already have an existing MPN Loan record?
  - If yes, the first MPN Loans screen (1 of 2) appears. Go to step 4.
  - If no, a message window appears indicating that the student does not have an MPN Loan record. You will need to use the Master-promissory-note process to create a new Stafford loan for the student. Select **Add** from the Message window. A new MPN Loans screen (1 of 2) appears. For more information on adding a Stafford loan using the MPN process see *How to Add Stafford Loan Information Using MPN* in this section.
4. Do you wish to update the MPN Loan record that is currently displayed?
  - If yes, go to step 5.
  - If no, select **Next** from the Commands menu until the desired MPN Loan record is displayed. Go to step 5.
5. Select **Update** from the Commands menu and make the desired changes in the fields.
6. Do you wish to update information on the MPN Loans screen (2 of 2) for this student?
  - If yes, select **Screen** from the Commands menu, make the desired changes in the fields and select **Finish**. The changes you have made to the MPN Loan record are saved.
  - If no, select **Finish**. The changes you have made to the selected MPN Loan record are saved.
7. Do you wish to update another MPN Loan record for this student?
  - If yes, select **Next** or **Previous** from the Commands menu until the desired MPN Loan record is displayed. Go back to step 5.
  - If no, select **Close** from the Commands menu. You are returned to the Loan Summary screen. CX displays the added loan on the student's Loan Summary screen.
8. Do you wish to continue to update MPN Loan records for other students?
  - If yes, go back to step 1.
  - If no, select **Exit** from the Commands menu. A message appears asking if you are sure that you wish to exit.
    - If yes, select **Yes**. You are returned to the Financial Aid: Loan Tracking Main menu.

- If no, select **No**. You are returned to the Loan Summary screen. Go back to step 1.

# Adding/Updating PLUS Loan Information

## How to Add PLUS Loan Information

Follow these steps to add PLUS Loan information.

1. Access the Loan Summary screen for the desired student. For information on how to access the Financial Aid Loan Summary screen, see Accessing Financial Aid Loan Information in this section.
2. At the Loan Summary screen, select **Plus** from the Commands menu.
3. Does the student already have an existing PLUS Loan record?
  - If yes, the first PLUS Loans screen (1 of 2) appears. Select **Add** from the Commands menu. A new PLUS Loans screen (1 of 2) appears in Add mode.
  - If no, a message window appears indicating that the student does not have a PLUS Loan record. Select **Add** from the Message window. A new PLUS Loans screen (1 of 2) appears in Add mode.
4. Enter the necessary information into the appropriate fields on the PLUS Loans screen (1 of 2). You must enter information in the following fields to create a PLUS Financial Aid Loan record for this student:
  - Originator
  - Aid Year
  - Loan Type
  - Period
  - BegEnd
  - Requested Service

**Note:** Once you complete the Period field, CX populates the BegEnd field automatically.
5. Select **Finish**. A new PLUS Loan record is created for the selected student.
6. Do you wish to update information on the PLUS Loans screen (2 of 2) for this student?
  - If yes, select **Screen** from the Commands menu. The PLUS Loans screen (2 of 2) appears. Select **Update** from the Commands menu and make the desired changes then select **Finish**. Go to step 7.
  - If no, go to step 7.
7. Do you wish to add another PLUS Loan record for this student?
  - If yes, select **Add** from the Commands menu and go back to step 4.
  - If no, select **Close** from the Commands menu. You are returned to the Loan Summary screen. CX displays the added loan on the student's Loan Summary screen.
8. Do you wish to continue to add PLUS Loan records for other students?
  - If yes, go back to step 1.
  - If no, select **Exit** from the Commands menu. A message appears asking if you are sure that you wish to exit.
    - If yes, select **Yes**. You are returned to the Financial Aid: Loan Tracking Main menu.
    - If no, select **No**. You are returned to the Loan Summary screen. Go back to step 1.

## How to Update PLUS Loan Information

Follow these steps to update existing PLUS Loan record information.

1. Access the Loan Summary screen for the desired student. For information on how to access the Financial Aid Loan Summary screen, see Accessing Financial Aid Loan Information in this section.
2. At the Loan Summary screen, select **Plus** from the Commands menu.
3. Does the student already have an existing PLUS Loan record?
  - If yes, the first PLUS Loans screen (1 of 2) appears. Go to step 4.
  - If no, a message window appears indicating that the student does not have an existing PLUS Loan record. You will need to create a PLUS Loan record for the student. Select **Add** from the Message window. A new PLUS Loans screen (1 of 2) appears in Add mode. For more information on adding a PLUS Loan record see *How to Add PLUS Loan Information* in this section.
4. Do you wish to update the PLUS Loan record that is currently displayed?
  - If yes, go to step 5.
  - If no, select **Next** from the Commands menu until the desired PLUS Loan record is displayed. Go to step 5.
5. Select **Update** from the Commands menu and make the desired changes in the fields.
6. Do you wish to update information on the PLUS Loans screen (2 of 2) for this student?
  - If yes, select **Screen** from the commands menu, make the desired changes in the fields, and select **Finish**. the changes you have made to the PLUS Loan record are saved.
  - If no, select **Finish**. the changes you have made to the PLUS Loan record are saved.
7. Do you wish to update another PLUS Loan record for this student?
  - If yes, select **Next** or **Previous** from the Commands menu until the desired PLUS Loan record is displayed. Go back to step 5.
  - If no, select **Close** from the Commands menu. You are returned to the Loan Summary screen. CX displays the added loan on the student's Loan Summary screen.
8. Do you wish to continue to update PLUS Loan records for other students?
  - If yes, go back to step 1.
  - If no, select **Exit** from the Commands menu. A message appears asking if you are sure that you wish to exit.
    - If yes, select **Yes**. You are returned to the Financial Aid: Loan Tracking Main menu.
    - If no, select **No**. You are returned to the Loan Summary screen. Go back to step 1.

## Adding/Updating Alternate Loan Information

### How to Add Alternate Loan Information

Follow these steps to add Alternate Loan information.

1. Access the Loan Summary screen for the desired student. For information on how to access the Financial Aid Loan Summary screen, see *Accessing Financial Aid Loan Information* in this section.
2. At the Loan Summary screen, select **Alternate** from the Commands menu.
3. Does the student already have an existing Alternate Loan record?
  - If yes, the first Alternate Loans screen (1 of 2) appears. Select **Add** from the Commands menu. A new Alternate Loans screen (1 of 2) appears in Add mode.
  - If no, a message window appears indicating that the student does not have an existing Alternate Loan record. Select **Add** from the Message window. A new Alternate Loans screen (1 of 2) appears in Add mode.
4. Enter the necessary information into the appropriate fields on the Alternate Loans screen (1 of 2). You must enter information in the following fields to create an Alternate Financial Aid Loan record for this student:
  - Originator
  - Aid Year
  - Loan Type
  - Grade Level
  - Period
  - BegEnd

**Note:** Once you complete the Period field, CX populates the BegEnd field automatically.
5. Select **Finish**. A new Alternate Loan record is created for the selected student.
6. Do you wish to update information on the current Alternate Loans screen (2 of 2)?
  - If yes, select **Screen** from the Commands menu. The Alternate Loans screen (2 of 2) appears. Select **Update** from the Commands menu and make the desired changes then select **Finish**. Go to step 7.
  - If no, go to step 7.
7. Do you wish to add another Alternate Loan record for this student?
  - If yes, select **Add** from the Commands menu and go back to step 4.
  - If no, select **Close** from the Commands menu. You are returned to the Loan Summary screen. CX displays the added loan on the student's Loan Summary screen.
8. Do you wish to continue to add Alternate Loan records for other students?
  - If yes, go back to step 1.
  - If no, select **Exit** from the Commands menu. A message appears asking if you are sure that you wish to exit.
    - If yes, select **Yes**. You are returned to the Financial Aid: Loan Tracking Main menu.
    - If no, select **No**. You are returned to the Loan Summary screen. Go back to step 1.

### How to Update Alternate Loan Information

Follow these steps to update existing Alternate Loan record information.

1. Access the Loan Summary screen for the desired student. For information on how to access the Financial Aid Loan Summary screen, see Accessing Financial Aid Loan Information in this section.
2. At the Loan Summary screen, select **Alternate** from the Commands menu.
3. Does the student already have an existing Alternate Loan record?
  - If yes, the first Alternate Loans screen (1 of 2) appears. Go to step 4.
  - If no, a message window appears indicating that the student does not have an existing Alternate Loan record. You will need to create an Alternate Loan record for the student. Select **Add** from the Message window. A new Alternate Loans screen (1 of 2) appears in Add mode. For more information on adding an Alternate Loan record see *How to Add Alternate Loan Information* in this section.
4. Do you wish to update the Alternate Loan record that is currently displayed?
  - If yes, go to step 5.
  - If no, select **Next** from the Commands menu until the desired Alternate Loan record is displayed. Go to step 5.
5. Select **Update** from the Commands menu and make the desired changes in the fields.
6. Do you wish to update information on the Alternate Loans screen (2 of 2) for this student?
  - If yes, select **Screen** from the Commands menu, make the desired changes in the fields, and select **Finish**. The changes you have made to the Alternate Loan record are saved.
  - If no, select **Finish**. The changes you have made to the Alternate Loan record are saved.
7. Do you wish to update another Alternate Loan record for this student?
  - If yes, select **Next** or **Previous** from the Commands menu until the desired Alternate Loan record is displayed. Go back to step 5.
  - If no, select **Close** from the Commands menu. You are returned to the Loan Summary screen. CX displays the added loan on the student's Loan Summary screen.
8. Do you wish to continue to update Alternate Loan records for other students?
  - If yes, go back to step 1.
  - If no, select **Exit** from the Commands menu. A message appears asking if you are sure that you wish to exit.
    - If yes, select **Yes**. You are returned to the Financial Aid: Loan Tracking Main menu.
    - If no, select **No**. You are returned to the Loan Summary screen. Go back to step 1.

# SECTION 4 - CREATING AND UPDATING FINANCIAL AID LOAN DISBURSEMENT SCHEDULES

## Overview

### Introduction

This section provides procedures to:

- Automatically create financial aid loan disbursement schedules
- Manually create financial aid loan disbursement schedules

### Before You Begin

Before you begin to use the following procedures for creating financial aid loan disbursement schedules, remember:

- An ID record for the student must already exist on the system.
- The student has to complete the admission process, resulting in the creation of a Program Enrollment record for the student.
- A Need Analysis Form record for the student must already exist on the system. For more information, see the *Financial Aid Need Analysis User Guide* manual.
- Use the field descriptions in the *Using the Financial Aid Loan Screens* section of this guide when you complete the fields on the screens discussed in this section.
- A completed Financial Aid Loan record for the student must already exist on the system.
- You cannot create a disbursement schedule until you have completed these fields on the selected Loan record:
  - a Period code indicating the beginning and ending session of the loan period
  - an Approved Gross Loan Amount

### Process

This list shows the general phases that take place before, during, and after creating disbursement schedules for Financial Aid Loan information.

1. Access Financial Aid Loan and enter appropriate parameters for processing financial aid summary information.
2. Query a student's financial aid record(s) to appear on the Financial Aid Loan Summary screen.
3. Select the loan for which you wish to create a disbursement schedule.
4. Create a disbursement schedule.
5. Enter and complete any required fields.

# Adding Financial Aid Loan Disbursements Schedules

## How to Create Financial Aid Loan Disbursements Schedules

Follow these steps to create financial aid loan disbursements schedules.

1. Access the Loan Summary screen for the desired student. For information on how to access the Financial Aid Loan Summary screen, see the *Adding or Updating Financial Aid Loan Information* section in this manual.
2. At the Loan Summary screen, select either **Stafford**, **Plus**, **Master-prom-note**, or **Alternate** from the Commands menu. The first Loan screen for the type of selected financial aid loan appears.

### Notes:

- A message window appears when CX does not locate an existing record for the type of Financial Aid loan that you specified. For PLUS, Master-promissory-note, or Alternate loans, select **Add** from the Message window and complete the necessary fields. For more information, see the *Adding or Updating Financial Aid Loan Information* section in this manual.
  - You cannot use the Stafford menu option to create a new Stafford loan for the 2000-2001 financial aid award year and beyond. If you wish to create a new Stafford loan beginning with the 2000-2001 financial aid award year, select **Master-prom-note** from the Commands menu. For more information, see the *Adding or Updating Financial Aid Loan Information* section in this manual.
3. Does the student have more than one of the selected types of Financial Aid Loan records?
    - If yes, select **Next** or **Previous** until the desired Financial Aid Loans screen is displayed. Go to step 4.
    - If no, go to step 4.
  4. At the selected Financial Aid Loans screen select **Disbursements** from the Commands menu. A message window appears telling you that disbursements can be generated automatically. Select one of the following options:
    - To allow CX to automatically create a disbursements schedule, select **Automatic** from the Message window. CX automatically generates and displays a disbursements schedule on the Loan Tracking Entry (Disbursements) window. Go to step 5.
    - To manually create a loan disbursements schedule, select **Manual** from the Message window. The Loan Tracking Entry (Disbursements) window appears. Enter the necessary information into the appropriate fields on the Loan Disbursements window. You must enter information in the following fields to create a loan disbursements schedule for this loan:
      - Loan Disbursement Number
      - Financial Aid Code
      - Session Code
      - Academic Year
      - Financial Aid Award Year Code
      - Gross Amount of Disbursement
      - Expected Date of Disbursement
      - Expected Net Amount of Disbursement
      - Status of Disbursement

Go to step 5.

**Note:** Jenzabar recommends that you allow the loan disbursements schedule to be created automatically.

5. The Hold/Release field is an optional field that enables your institution to manage transfer of funds more accurately. Instead of requesting funds for students who are not eligible to receive the monies on his/her student account, your institution can request that funds be "held" until such time as you request the funds be "released". Do you wish to release funds to this student's account?
    - If yes, select **R** for Release. Go to step 6.
    - If no, select **H** for Hold. Go to step 6.
    - If you do not wish to use the Hold/Release feature at this time, leave this field blank. Go to step 6.
  6. The Disbursement Method field is an optional field that enables your institution to select the method you wish to use to disburse the financial aid loan amount to the borrower's account. You can select one of the following options:
    - Blank (if you do not wish to use the Disbursement Method field at this time.)
    - E (EFT)
    - I (Individual Check)
    - M (Master Check)
    - N (Netting) - this is a disbursement method in which funds that have been sent to your institution electronically are reallocated for disbursement to another eligible borrower, or borrowers, instead of being returned to the disbursing agent. The disbursing agent then offsets (deducts) the adjusted amounts from the total dollar amounts on the next transmission of funds to the school. Netting is applicable only to EFT and Master Check disbursements.
  7. Do you wish to accept the current field entries?
    - If yes, go to step 6.
    - If no, change the desired fields and go to step 6.
  8. Do you wish to divide the current loan into additional disbursements?
    - If yes, select **Add-line** from the Commands menu. CX inserts a new line in the current Loan Tracking Entry (Disbursements) window with the cursor in the # field. Complete the appropriate fields and go to step 7.
    - If no, go to step 7.
  9. Do you wish to accept the loan disbursements schedule?
    - If Yes, select **Finish** from the Commands menu. You have successfully created the loan disbursements schedule for this loan. You are returned to the current Financial Aid Loans screen.

**Note:** The amount of each disbursement must equal the total loan amount. If the disbursements total does not equal the loan amount, you will receive a message informing you of the discrepancy. Return to the Loan Tracking Entry (Disbursements) window and adjust the disbursement amounts.
    - If no, select **Cancel** from the Commands menu. You have not created a loan disbursements schedule for this loan. You are returned to the current Financial Aid Loans screen.
  10. Do you wish to create a loan disbursements schedule for another Financial Aid Loan record for this student?
    - If yes, perform one of the following:
      - If you wish to create a loan disbursements schedule for the same type of loan, go back to step 3.
      - If you wish to create a loan disbursements schedule for a different type of loan, select **Close** from the Commands menu. You are returned to the Loan Summary screen. Go back to step 2.
    - If no, select **Close** from the Commands menu. You are returned to the Loan Summary screen.
-

11. Do you wish to continue to create financial aid loan disbursements schedules?
- If yes, go back to step 1.
  - If no, select **Exit** from the Commands menu. A message appears asking if you are sure that you wish to exit.
    - If yes, select **Yes**. You are returned to the Financial Aid: Loan Tracking Main menu.
    - If no, select **No**. You are returned to the Loan Summary screen. Go back to step 1.

# Updating Financial Aid Loan Disbursements Schedules

## How to Update Financial Aid Loan Disbursements Schedules

Follow these steps to update financial aid loan disbursements schedules.

1. Access the Loan Summary screen for the desired student. For information on how to access the Financial Aid Loan Summary screen, see the *Adding or Updating Financial Aid Loan Information* section in this manual.
2. At the Loan Summary screen, select either **Stafford**, **Plus**, **Master-prom-note**, or **Alternate** from the Commands menu. The first Loan screen for the type of selected financial aid loan appears.

### Notes:

- A message window appears when CX does not locate an existing record for the type of Financial Aid loan that you specified. For PLUS, Master-promissory-note, or Alternate loans, select **Add** from the Message window and complete the necessary fields. For more information, see the *Adding or Updating Financial Aid Loan Information* section in this manual.
  - You cannot use the Stafford menu option to create a new Stafford loan for the 2000-2001 financial aid award year and beyond. If you wish to create a new Stafford loan beginning with the 2000-2001 financial aid award year, select **Master-prom-note** from the Commands menu. For more information, see the *Adding or Updating Financial Aid Loan Information* section in this manual.
3. Does the student have more than one of the selected types of Financial Aid Loan records?
    - If yes, select **Next** or **Previous** until the desired Financial Aid Loans screen is displayed. Go to step 4.
    - If no, go to step 4.
  4. At the desired Loans screen select **Disbursements** from the Commands menu. The Loan Disbursements window appears.

**Note:** A message window appears asking you what type of disbursements schedule you wish to create when no previous disbursements schedule exists for this loan. For information on how to create a disbursements schedule, see *Adding Financial Aid Loan Disbursements Schedules* in this section.

5. Make the desired changes in the fields and go to step 6.
6. Do you wish to divide the current loan into additional disbursements?
  - If yes, select **Add-line** from the Commands menu. CX inserts a new line in the current Loan Tracking Entry (Disbursements) window with the cursor in the # field. Complete the appropriate fields and go to step 7.
  - If no, go to step 7.
7. Do you wish to accept the loan disbursements schedule?
  - If Yes, select **Finish** from the Commands menu. You have successfully updated the loan disbursements schedule for this loan. You are returned to the current Financial Aid Loans screen.

**Note:** The amount of each disbursement must equal the total loan amount. If the disbursements total does not equal the loan amount, you will receive a message informing you of the discrepancy. Return to the Loan Tracking Entry (Disbursements) window and adjust the disbursement amounts.

- If **no**, select **Cancel** from the Commands menu. You have not updated the loan disbursements schedule for this loan. You are returned to the current Financial Aid Loans screen.
8. Do you wish to update a loan disbursements schedule for another Financial Aid Loan record for this student?
- If **yes**, perform one of the following:
    - If you wish to update a loan disbursements schedule for the same type of loan, go back to step 3.
    - If you wish to update a loan disbursements schedule for a different type of loan, select **Close** from the Commands menu. You are returned to the Loan Summary screen. Go back to step 2.
  - If **no**, select **Close** from the Commands menu. You are returned to the Loan Summary screen.
9. Do you wish to continue to update financial aid loan disbursements schedules?
- If **yes**, go back to step 1.
  - If **no**, select **Exit** from the Commands menu. A message appears asking if you are sure that you wish to exit.
    - If **yes**, select **Yes**. You are returned to the Financial Aid: Loan Tracking Main menu.
    - If **no**, select **No**. You are returned to the Loan Summary screen. Go back to step 1.

# SECTION 5 - CERTIFYING FINANCIAL AID LOAN APPLICATIONS

## Overview

### Introduction

This section provides procedures to certify that the loan information on the loan applications is correct and ready to send to the service provider for approval.

### Before You Begin

Before you begin to use the following procedures for certifying financial aid loan applications, remember:

- An ID record for the student must already exist on the system.
- The student has to complete the admission process, resulting in the creation of a Program Enrollment record for the student.
- A Need Analysis Form record for the student must already exist on the system. For more information, see the *Financial Aid Need Analysis User Guide* manual.
- Use the field descriptions in the *Using the Financial Aid Loan Screens* section of this guide when you complete the fields on the screens discussed in this section.
- A Completed Financial Aid Loan record for the student must already exist on the system.
- A Loan Disbursements schedule must exist on the system.

### Process

This list shows the general phases that take place before, during, and after certifying Financial Aid Loan information.

1. Access Financial Aid Loan and enter appropriate parameters for processing financial aid summary information.
2. Query the student's financial aid record(s).
3. Select the type of loan you wish to certify for a particular student.
4. Verify that there is a disbursements schedule for the desired loan.
5. Certify the loan.
6. Enter and complete any required fields.

# Certifying Financial Aid CommonLine Parent (PLUS) Loan Applications

## How to Certify Financial Aid CommonLine Parent (PLUS) Loan Applications

Follow these steps to certify financial aid CommonLine Parent (PLUS) loan applications to the service provider.

1. Access the Loan Summary screen for the desired student. For information on how to access the Financial Aid Loan Summary screen, see the *Adding or Updating Financial Aid Loan Information* section in this manual.
2. At the Loan Summary screen, select **Plus** from the Commands menu. The first Parent Loans (PLUS) screen (1 of 2) appears.

**Note:** A message window appears when CX does not locate an existing record for the type of Financial Aid loan that you specify. Select **Add** from the Message window and complete the necessary fields. For more information, see the *Adding or Updating Financial Aid Loan Information* section in this manual.

3. Does the student have more than one Parent Loan (PLUS) record?
  - If yes, select **Next** or **Previous** until the desired Parent Loans (PLUS) screen (1 of 2) is displayed. Go to step 4.
  - If no, go to step 4.

**Note:** Make sure the entry in the Originator field on the PLUS Loan is CommonLine. For information on how to certify a PLUS Loan for which the entry in the Originator field is Direct Lending, see *Certifying Financial Aid Direct Lending Parent (PLUS) Loan Applications* in this section.

4. Select **Certify** from the Commands menu.
  - If you have not created a disbursements schedule, a message window appears telling you that the loan must have disbursements to be properly certified. To create a Disbursements schedule, see the *Creating and Updating Financial Aid Loan Disbursements Schedules* section in this manual.
  - If you have already created a disbursements schedule, CX puts you in Update mode. Enter the necessary information into the appropriate fields on the Parent Loans (PLUS) screen (1 of 2). You must enter information in the following fields to certify the CommonLine PLUS loan:
    - Guarantor
    - Antic Grad
    - Enroll Stat
    - Attend Cost
    - Estimated Aid
    - Citizenship
    - Driver Lic. St.
    - Lic #
    - Date of Birth
    - Signed
    - References
    - Req. Amt.
5. Select **Finish** from the Commands menu. The Parent Loans (PLUS) screen (2 of 2) appears. Enter the necessary information into the appropriate fields on the Parent Loans (PLUS) screen (2 of 2). You must enter information in the following fields to continue to certify the CommonLine PLUS loan:

- Additional Borrower (Parent) SSN
  - Additional Borrower (Parent) Phone
  - Additional Borrower (Parent) Name
  - Additional Borrower (Parent) Address
  - Student's Information (PLUS Loans Only) Citizenship
  - Student's Information (PLUS Loans Only) Date of Birth
  - Student's Information (PLUS Loans Only) In Default
  - Student's Information (PLUS Loans Only) SSN
  - Student's Information (PLUS Loans Only) Name
6. Select **Finish** from the Commands menu. You are returned to the Parent Loans (PLUS) screen (1 of 2). A message in the comment line appears telling you that the loan is certified.
  7. Do you want to certify another CommonLine PLUS Loan record for this student?
    - If yes, go back to step 3.
    - If no, select **Close** from the Commands menu. You are returned to the Loan Summary screen. The certified status of the loan is displayed on the student's Loan Summary screen.
  8. Do you want to certify more financial aid loans for other students?
    - If yes, go back to step 1.
    - If no, select **Exit** from the Commands menu. A message appears asking if you are sure that you wish to exit.
      - If yes, select **Yes**. You are returned to the Financial Aid: Loan Tracking Main menu.
      - If no, select **No**. You are returned to the Loan Summary screen. Go back to step 1.

# Certifying Financial Aid Direct Lending Parent (PLUS) Loan Applications

## How to Certify Financial Aid Direct Lending Parent (PLUS) Loan Applications

Follow these steps to certify financial aid Direct Lending Parent (PLUS) loan applications to the service provider.

1. Access the Loan Summary screen for the desired student. For information on how to access the Financial Aid Loan Summary screen, see the *Adding or Updating Financial Aid Loan Information* section in this manual.
2. At the Loan Summary screen, select **Plus** from the Commands menu. The first Parent Loans (PLUS) screen (1 of 2) appears.

**Note:** A message window appears when CX does not locate an existing record for the type of Financial Aid loan that you specified. Select **Add** from the Message window and complete the necessary fields. For more information, see *Adding Financial Aid Loan Information* in this manual.

3. Is there more than one Parent (PLUS) Loan record for this student?
  - If yes, select **Next** or **Previous** until the desired Parent Loans (PLUS) screen (1 of 2) is displayed. Go to step 4.
  - If no, go to step 4.

**Note:** Make sure the entry in the Originator field on the PLUS Loan is Direct Lending. For information on how to certify a PLUS Loan for which the entry in the Originator field is CommonLine, see *Certifying Financial Aid CommonLine Parent (PLUS) Loan Applications* in this section.

4. Select **Certify** from the Commands menu.
  - If you have not created a disbursements schedule, a message window appears telling you that the loan must have disbursements to be properly certified. To create a Disbursements schedule, select **Disbursements** from the message window. For more information see the *Creating and Updating Financial Aid Loan Disbursements Schedules* section in this manual.
  - If you have already created a disbursements schedule, CX puts you in Update mode. Enter the necessary information into the appropriate fields on the Parent Loans (PLUS) screen (1 of 2). You must enter information in the following fields to certify the Direct Lending PLUS loan:
    - Citizenship
    - In Default
    - Request Amount
5. Select **Finish** from the Commands menu. The Parent Loans (PLUS) screen (2 of 2) appears. Enter the necessary information into the appropriate fields on the Parent Loans (PLUS) screen (2 of 2). You must enter information in the following fields to continue to certify the Direct Lending PLUS loan:
  - Additional Borrower (Parent) SSN
  - Additional Borrower (Parent) Phone
  - Additional Borrower (Parent) Name
  - Additional Borrower (Parent) Address
  - Student's Information (PLUS Loans Only) Citizenship
  - Student's Information (PLUS Loans Only) Date of Birth
  - Student's Information (PLUS Loans Only) In Default
  - Student's Information (PLUS Loans Only) SSN

– Student's Information (PLUS Loans Only) Name

6. Select **Finish** from the Commands menu. You are returned to the Parent Loans (PLUS) screen (1 of 2). A message in the comment line appears telling you that the loan is certified.
7. Do you want to certify another Direct Lending Parent (PLUS) Loan record for this student?
  - If yes, go back to step 3.
  - If no, select **Close** from the Commands menu. You are returned to the Loan Summary screen. The certified status of the loan is displayed on the student's Loan Summary screen.
8. Do you wish to certify more financial aid loans?
  - If yes, go back to step 1.
  - If no, select **Exit** from the Commands menu. A message appears asking if you are sure that you wish to exit.
    - If yes, select **Yes**. You are returned to the Financial Aid: Loan Tracking Main menu.
    - If no, select **No**. You are returned to the Loan Summary screen. Go back to step 1.

# Certifying Financial Aid CommonLine Stafford Loan Applications

## How to Certify Financial Aid CommonLine Stafford Loan Applications

Follow these steps to certify financial aid CommonLine Stafford loan applications to the service provider.

1. Access the Loan Summary screen for the desired student. For information on how to access the Financial Aid Loan Summary screen, see the *Adding or Updating Financial Aid Loan Information* section in this manual.
2. At the Loan Summary screen, select **Stafford** from the Commands menu. The first Stafford Loans screen (1 of 2) appears.

**Note:** A message window appears when CX does not locate an existing record for the type of Financial Aid loan that you specified. Select **Add** from the Message window and complete the necessary fields. For more information, see *Adding Financial Aid Loan Information* in this section.

3. Does the student have more than one Stafford Loan record?
  - If yes, select **Next** or **Previous** until the desired Stafford Loans screen (1 of 2) is displayed. Go to step 4.
  - If no, go to step 4.

**Note:** Make sure the entry in the Originator field on the Stafford Loan is CommonLine. For information on how to certify a Stafford Loan for which the entry in the Originator field is Direct Lending, see *Certifying Financial Aid Direct Lending Stafford Loan Applications* in this section.

4. Select **Certify** from the Commands menu.
  - If you have not created a disbursements schedule, a message window appears telling you that the loan must have disbursements to be properly certified. To create a disbursements schedule, see the *Creating and Updating Financial Aid Loan Disbursements Schedules* section in this manual.
  - If you have already created a disbursements schedule, CX puts you in Update mode. Enter the necessary information into the appropriate fields on the Stafford Loans screen (1 of 2). You must enter information in the following fields to certify the CommonLine Stafford loan:
    - Guarantor
    - Enroll Stat
    - Attend Cost
    - Estimated Aid
    - Driver Lic. St.
    - Lic #
    - Date of Birth
    - Signed
    - References
    - Req. Amt.
5. Select **Finish** from the Commands menu. The Stafford Loans screen (2 of 2) appears. Enter the necessary information into the appropriate fields on the Stafford Loans screen (2 of 2). You must enter information in the following fields to continue to certify the CommonLine Stafford loan:
  - Additional Borrower (Student) SSN
  - Additional Borrower (Student) Phone
  - Additional Borrower (Student) Name

– Additional Borrower (Student) Address

6. Select **Finish** from the Commands menu. You are returned to the Stafford Loans screen (1 of 2). A message in the comment line appears telling you that the loan is certified.
7. Do you want to certify another CommonLine Stafford Loan record for this student?
  - If yes, go back to step 3.
  - If no, select **Close** from the Commands menu. You are returned to the Loan Summary screen. The certified status of the loan is displayed on the student's Loan Summary screen.
8. Do you want to certify more financial aid loans for other students?
  - If yes, go back to step 1.
  - If no, select **Exit** from the Commands menu. A message appears asking if you are sure that you wish to exit.
    - If yes, select **Yes**. You are returned to the Financial Aid: Loan Tracking Main menu.
    - If no, select **No**. You are returned to the Loan Summary screen. Go back to step 1.

# Certifying Financial Aid Direct Lending Stafford Loan Applications

## How to Certify Financial Aid Direct Lending Stafford Loan Applications

Follow these steps to certify financial aid Direct Lending Stafford loan applications to the service provider.

1. Access the Loan Summary screen for the desired student. For information on how to access the Financial Aid Loan Summary screen, see the *Adding or Updating Financial Aid Loan Information* section in this manual.
2. At the Loan Summary screen, select **Stafford** from the Commands menu. The first Stafford Loans screen (1 of 2) appears.

**Note:** If the student does not have an existing Stafford Loan record, a window appears telling you that the student does not have any existing Stafford Loan records. Select **Add** from the Message window and complete the necessary fields. For more information, see the *Adding or Updating Financial Aid Loan Information* section in this manual.

3. Does the student have more than one Stafford Loan record?
  - If yes, select **Next** or **Previous** until the desired Stafford Loans screen (1 of 2) is displayed. Go to step 4.
  - If no, go to step 4.

**Note:** Make sure the entry in the Originator field on the Stafford Loan is Direct Lending. For information on how to certify a Stafford Loan for which the entry in the Originator field is CommonLine, see *Certifying Financial Aid CommonLine Stafford Loan Applications* in this section.

4. Select **Certify** from the Commands menu.
  - If you have not created a disbursements schedule, a message window appears telling you that the loan must have disbursements to be properly certified. To create a disbursements schedule, see the *Creating and Updating Financial Aid Loan Disbursements Schedules* section in this manual.
  - If you have already created a disbursements schedule, CX puts you in Update mode. Enter the necessary information into the appropriate fields on the Stafford Loans screen (1 of 2). You must enter information in the following fields to certify the Direct Lending Stafford loan:
    - Dependent
    - Date of Birth
    - In Default
    - Request Amt.
5. Select **Finish** from the Commands menu. The Stafford Loans screen (2 of 2) appears. Enter the necessary information into the appropriate fields on the Stafford Loans screen (2 of 2). You must enter information in the following fields to continue to certify the Direct Lending Stafford loan:
  - Additional Borrower (Student) SSN
  - Additional Borrower (Student) Phone
  - Additional Borrower (Student) Name
  - Additional Borrower (Student) Address
6. Select **Finish** from the Commands menu. You are returned to the Stafford Loans screen (1 of 2). A message in the comment line appears telling you that the loan is certified.
7. Do you want to certify another Direct Lending Stafford Loan record for this student?
  - If yes, go back to step 3.

- If no, select **Close** from the Commands menu. You are returned to the Loan Summary screen. The certified status of the loan is displayed on the student's Loan Summary screen.
8. Do you want to certify more financial aid loans for other students?
- If yes, go back to step 1.
  - If no, select **Exit** from the Commands menu. A message appears asking if you are sure that you wish to exit.
    - If yes, select **Yes**. You are returned to the Financial Aid: Loan Tracking Main menu.
    - If no, select **No**. You are returned to the Loan Summary screen. Go back to step 1.

# Certifying Financial Aid CommonLine Stafford Loan Applications Using MPN

## How to Certify Financial Aid CommonLine Stafford Loan Applications Using MPN

Follow these steps to certify financial aid CommonLine Stafford loan applications to the service provider using Master Promissory Note.

**Note:** Once your institution is configured to use Master-promissory-note, you must certify all Stafford Loan records through the Master-promissory-note option. Use this process only for Stafford loans created for the 2000-2001 financial aid award year and beyond. To certify Stafford loans created prior to the 2000-2001 financial aid award year, use the Stafford Loan process. For more information on the Stafford Loan process see *How to Certify Financial Aid CommonLine Stafford Loan Applications* in this section.

1. Access the Loan Summary screen for the desired student. For information on how to access the Financial Aid Loan Summary screen, see the *Adding or Updating Financial Aid Loan Information* section in this manual.
2. At the Loan Summary screen, select **Master-prom-note** from the Commands menu. The first MPN Loans screen (1 of 2) appears.

**Note:** A message window appears when CX does not locate an existing record for the type of Financial Aid loan that you specified. Select **Add** from the Message window and complete the necessary fields. For more information, see *Adding Financial Aid Loan Information* in this section.

3. Does the student have more than one MPN (Stafford) Loan record?
  - If **yes**, select **Next** or **Previous** until the desired MPN (Stafford) Loans screen is displayed. Go to step 4.
  - If **no**, go to step 4.

**Note:** Make sure the entry in the Originator field on the Stafford Loan is CommonLine. For information on how to certify a Stafford Loan for which the entry in the Originator field is Direct Lending, see *Certifying Financial Aid CommonLine Stafford Loan Applications Using MPN* in this section.

4. Select **Certify** from the Commands menu.
  - If you have not created a disbursements schedule, a message window appears telling you that the loan must have disbursements to be properly certified. To create a disbursements schedule, see the *Creating and Updating Financial Aid Loan Disbursements Schedules* section in this manual.
  - If you have already created a disbursements schedule, CX puts you in Update mode. Enter the necessary information into the appropriate fields on the Stafford Loans screen. You must enter information in the following fields to certify the CommonLine Stafford loan:
    - Guarantor
    - Enroll Stat
    - Attend Cost
    - Estimated Aid
    - Driver Lic. St.
    - Lic #
    - Date of Birth
    - Signed
    - References
    - Req. Amt.

- Serial Code (MPN)
  - Delivery (MPN)
5. Select **Finish** from the Commands menu. The MPN Loans screen (2 of 2) appears. Enter the necessary information into the appropriate fields on the MPN Loans screen (2 of 2). You must enter information in the following fields to continue to certify the CommonLine Stafford loan:
    - Additional Borrower (Student) SSN
    - Additional Borrower (Student) Phone
    - Additional Borrower (Student) Name
    - Additional Borrower (Student) Address
  6. Select **Finish** from the Commands menu. You are returned to the MPN Loans screen (1 of 2). A message in the comment line appears telling you that the loan is certified.
  7. Do you want to certify another CommonLine Stafford Loan record for this student?
    - If yes, go back to step 3.
    - If no, select **Close** from the Commands menu. You are returned to the Loan Summary screen. The certified status of the loan is displayed on the student's Loan Summary screen.
  8. Do you want to certify more financial aid loans for other students?
    - If yes, go back to step 1.
    - If no, select **Exit** from the Commands menu. A message appears asking if you are sure that you wish to exit.
      - If yes, select **Yes**. You are returned to the Financial Aid: Loan Tracking Main menu.
      - If no, select **No**. You are returned to the Loan Summary screen. Go back to step 1.

# Certifying Financial Aid Direct Lending Stafford Loan Applications Using MPN

## How to Certify Financial Aid Direct Lending Stafford Loan Applications Using MPN

Follow these steps to certify financial aid Direct Lending Stafford loan applications to the service provider using Master Promissory Note.

**Note:** Once your institution is configured to use Master-promissory-note, you must certify all Stafford Loan records through the Master-promissory-note option. Use this process only for Stafford loans created for the 2000-2001 financial aid award year and beyond. To certify Stafford loans created prior to the 2000-2001 financial aid award year, use the Stafford Loan process. For more information on the Stafford Loan process see *How to Certify Financial Aid CommonLine Stafford Loan Applications* in this section.

1. Access the Loan Summary screen for the desired student. For information on how to access the Financial Aid Loan Summary screen, see the *Adding or Updating Financial Aid Loan Information* section in this manual.
2. At the Loan Summary screen, select **Master-prom-note** from the Commands menu. The first MPN Loans screen (1 of 2) appears.

**Note:** If the student does not have an existing MPN (Stafford) Loan record, a window appears telling you that the student does not have any existing MPN (Stafford) Loan records. Select **Add** from the Message window and complete the necessary fields. For more information, see the *Adding or Updating Financial Aid Loan Information* section in this manual.

3. Does the student have more than one MPN (Stafford) Loan record?
  - If **yes**, select **Next** or **Previous** until the desired MPN Loans screen (1 of 2) is displayed. Go to step 4.
  - If **no**, go to step 4.

**Note:** Make sure the entry in the Originator field on the MPN (Stafford) Loan is Direct Lending. For information on how to certify an MPN (Stafford) Loan for which the entry in the Originator field is CommonLine, see *Certifying Financial Aid CommonLine Stafford Loan Applications* in this section.

4. Select **Certify** from the Commands menu.
  - If you have not created a disbursements schedule, a message window appears telling you that the loan must have disbursements to be properly certified. To create a disbursements schedule, see the *Creating and Updating Financial Aid Loan Disbursements Schedules* section in this manual.
  - If you have already created a disbursements schedule, CX puts you in Update mode. Enter the necessary information into the appropriate fields on the MPN Loans screen (1 of 2). You must enter information in the following fields to certify the Direct Lending Stafford loan:
    - Dependent
    - Date of Birth
    - In Default
    - Request Amt.
    - Serial Code (MPN)
    - Delivery (MPN)

5. Select **Finish** from the Commands menu. The MPN Loans screen (2 of 2) appears. Enter the necessary information into the appropriate fields on the MPN Loans screen (2 of 2). You

must enter information in the following fields to continue to certify the Direct Lending Stafford loan:

- Additional Borrower (Student) SSN
- Additional Borrower (Student) Phone
- Additional Borrower (Student) Name
- Additional Borrower (Student) Address

6. Select **Finish** from the Commands menu. You are returned to the MPN Loans screen (1 of 2). A message in the comment line appears telling you that the loan is certified.
7. Do you want to certify another Direct Lending MPN (Stafford) Loan record for this student?
  - If yes, go back to step 3.
  - If no, select **Close** from the Commands menu. You are returned to the Loan Summary screen. The certified status of the loan is displayed on the student's Loan Summary screen.
8. Do you want to certify more financial aid loans for other students?
  - If yes, go back to step 1.
  - If no, select **Exit** from the Commands menu. A message appears asking if you are sure that you wish to exit.
    - If yes, select **Yes**. You are returned to the Financial Aid: Loan Tracking Main menu.
    - If no, select **No**. You are returned to the Loan Summary screen. Go back to step 1.

# Certifying Financial Aid Alternate Loan Applications

## How to Certify Financial Aid Alternate Loan Applications Using

Follow these steps to certify financial aid Alternate loan applications to the service provider.

1. Access the Loan Summary screen for the desired student. For information on how to access the Financial Aid Loan Summary screen, see the *Adding or Updating Financial Aid Loan Information* section in this manual.
2. At the Loan Summary screen, select **Alternate** from the Commands menu. The first Alternate Loans screen (1 of 2) appears.  
**Note:** If the student does not have an existing Alternate Loan record, a window appears telling you that the student does not have any existing Alternate Loan records. Select **Add** from the Message window and complete the necessary fields. For more information, see the *Adding or Updating Financial Aid Loan Information* section in this manual.
3. Does the student have more than one Alternate Loan record?
  - If yes, select **Next** or **Previous** until the desired Alternate Loans screen (1 of 2) is displayed. Go to step 4.
  - If no, go to step 4.
4. Select **Certify** from the Commands menu.
  - If you have not created a disbursements schedule, a message window appears telling you that the loan must have disbursements to be properly certified. To create a disbursements schedule, see the *Creating and Updating Financial Aid Loan Disbursements Schedules* section in this manual.
  - If you have already created a disbursements schedule, CX puts you in Update mode. Enter the necessary information into the appropriate fields on the Alternate Loans screen (1 of 2). You must enter information in the following fields to certify the Alternate loan:
    - DOB
    - Loan Amount Requested
5. Select **Finish** from the Commands menu. The Alternate Loans screen (2 of 2) appears. Enter the necessary information into the appropriate fields on the Alternate Loans screen (2 of 2). You must enter information in the following fields to continue to certify the Alternate loan:
  - Cosigner SSN
  - Cosigner Phone
  - Cosigner Name
  - Cosigner Address
6. Select **Finish** from the Commands menu. You are returned to the Alternate Loans screen (1 of 2). A message in the comment line appears telling you that the loan is certified.
7. Do you want to certify another Alternate Loan record for this student?
  - If yes, go back to step 3.
  - If no, select **Close** from the Commands menu. You are returned to the Loan Summary screen. The certified status of the loan is displayed on the student's Loan Summary screen.
8. Do you want to certify more financial aid loans for other students?
  - If yes, go back to step 1.

- If no, select **Exit** from the Commands menu. A message appears asking if you are sure that you wish to exit.
  - If yes, select **Yes**. You are returned to the Financial Aid: Loan Tracking Main menu.
  - If no, select **No**. You are returned to the Loan Summary screen. Go back to step 1.



# SECTION 6 - EXTERNAL LOAN APPLICATIONS

## Overview

### Introduction

If your institution uses an external service provider to create a Student Loan record, you will need to create and re-import each External Loan record into CX individually. This section provides procedures to:

- Create an External Loan record
- Re-Import the External Loan record as an Exception file

### Before You Begin

Before you begin to use the following procedures for creating and re-importing external financial aid loan applications, remember:

- If your institution is using the loan tracking module to send and receive loan tracking disbursement via electronic fund transfer (EFT), you must load the financial table entries to support the posting of EFT roster files.
- An ID record for the student must already exist on the system.
- The student has to complete the admission process, resulting in the creation of a Program Enrollment record for the student.
- Use the field descriptions in the *Using the Financial Aid Loan Screens* section of this guide when you complete the fields on the screens discussed in this section.
- You must certify the loan before you can export it to the service provider. For information on how to certify a financial aid loan, see the *Certifying Financial Aid Loan Applications* section in this manual.

### Process

This list shows the general phases that take place before, during, and after creating and re-importing external Financial Aid Loan information.

1. Access Financial Aid: Loan Tracking Main menu.
2. Query the student's financial aid record(s).
3. Select the type of external loan you wish to create for a particular student.
4. Complete and save all field entries.
5. Identify this loan as an External loan.
6. Complete the UniqID field and save the Loan record.
7. Select **Re-Import Loans** and enter appropriate parameters for processing external financial aid applications.
8. Enter and complete Output parameters.

# Creating An External Financial Aid Loan Application Record

## How to Create An External Financial Aid Loan Application

Follow these steps to create an External Financial Aid Loan record.

1. Access the Loan Summary screen for the desired student. For information on how to access the Financial Aid Loan Summary screen, see *Accessing Financial Aid Loan Information* in this section.
2. At the Loan Summary screen, select the type of Loan record you wish to create for the student (e.g., MPN, PLUS, or Alternate). Does this student have an existing Loan record for the selected type of loan?
  - If yes, the first Loan record for the selected type of Loan appears. Select **Add** from the Commands menu. A new Loan screen (1 of 2) appears in Add mode. Go to step 3.
  - If no, a message window appears informing you that this student does not have any existing Loan records for the selected type of loan. Select **Add** from the Message window. A new Loan screen (1 of 2) appears in Add mode. Go to step 3.
3. Use the data you received from the external service provider to enter the necessary information into the appropriate fields on the Loans screen (1 of 2) and select **Finish** from the Commands menu.
4. Do you wish to add information to the selected Loan screen (2 of 2)?
  - If yes, select **Screen** from the Commands menu. The selected Loan screen (2 of 2) appears. Select **Update** from the Commands menu and make the desired changes then select **Finish**. Go to step 5.
  - If no, go to step 5.
5. Do you wish to create Disbursement records for the selected Loan?
  - If yes, select **Disbursements** from the Commands menu, complete the desired fields and select **Finish** from the Commands menu. For more information, see the *Creating And Updating Financial Aid Loan Disbursement Schedules* section in this manual. Go to step 6.
  - If no, go to step 6.
6. Select **External** from the Commands menu. The UniqueID field appears in Update mode.
7. In the UniqueID field enter the ID number that appears on the external Loan application and select **Finish** from the Commands menu. This identifies the current Loan record as an Exception file.
8. Do you wish to create another external Loan record for this student?
  - If you wish to create the same type of loan (e.g., MPN, PLUS, or Alternate), select **Add** from the Commands menu and go back to step 3.
  - If you wish to create a different type of loan (e.g., MPN, PLUS, or Alternate), select **Close** from the Commands menu. You are returned to the Loan Summary screen. Go back to step 2.
  - If you do not wish to update another Loan record for this student, select **Close** from the Commands menu. You are returned to the Loan Summary screen.
9. Do you wish to create an external Loan record for another student?
  - If yes, go back to step 1.
  - If no, at the Loan Summary screen, select **Exit** from the Commands menu. A message window appears asking you if you are sure you wish to exit the Loan Tracking program.

- If yes, select **Yes** from the message window. You are returned to the Financial Aid: Loan Tracking menu.
- If no, select **No** from the message window. You are returned to the current Loan Summary screen.

# Re-Importing Exception Files

## How to Re-Import Loan Exception Files

Follow these steps to re-import Loan Exception files into CX. You must re-import each Loan Exception file individually.

1. From the Financial Aid: Loan Tracking Main menu, select **Re-Import Loans**. The Re-Import Loans Parameters screen appears.
2. At the Re-Import Loans Parameters screen, enter the appropriate values as follows:
  - The Unique ID Number of the External Loan record. This is the number the user entered in the UniqID field on the External Loan record in CX. For more information on creating External Loan records, see *Creating An External Financial Aid Loan Application* in this section.
  - The Financial Aid Year code for which you wish to re-import the external Financial Aid Loan record (e.g., 0001 for 2000-2001). Use **Table Lookup** for a list of valid codes.
  - In order to re-import an external Loan Application Response file, you must first create the External Loan Application record using the Loan Tracking module in CX. For more information see *Creating An External Financial Aid Loan Application Record* in this section. Do you wish to re-import an original External Loan Application Response file?
    - If yes, select **Y** in the Application Response field.
    - If no, select **N** in the Application Response field.
  - In order to re-import an external Loan Disbursement Roster file, you must first create the External Loan Disbursement record using the Loan Tracking module in CX. For more information see *Creating An External Financial Aid Loan Application Record* in this section. Do you wish to re-import an external Disbursement Roster file?
    - If yes, select **Y** in the Disbursement Rosters field. Go to step 3.
    - If no, select **N** in the Disbursement Rosters field. Go to step 4.
3. To import an External Disbursement Roster record, enter the appropriate values as follows:
  - The code for the type of journal you wish to post EFT disbursements (e.g., AC for Accounting Journal). Use **Table Lookup** for a list of valid codes.
  - The code for the type of document the agency uses for disbursements (e.g., ET for Loan Tracking EFT Wire). Use **Table Lookup** for a list of valid codes.
  - The EFT Station number.
  - The code for the entry type to post EFT disbursements (e.g., AID for Aid Issued). Use **Table Lookup** for a list of valid codes.
  - The code for the subsidiary to post EFT disbursements (e.g., A/P for Accounts Payable). Use **Table Lookup** for a list of valid codes.
  - The effective date (*mmdyyyy*) of the journal to be posted for the roster file.
4. Select **Finish**. The Output Parameters and Scheduling window appears.
5. At the Output Parameters window, place your cursor on the Time field and specify the time you want this process to execute, or enter **NOW** to execute it now.
6. In the Day field, enter the day you want this process to execute, or leave blank for the current date.
7. If **NOW** was selected for the time, enter **Y** in the Background parameters window to run this process in the background.
8. Select **Finish**. The Financial Aid: Loan Tracking menu appears.

**Note:** If you entered **NOW** in the Time field, "Exist" appears next to the menu option Tasks. Otherwise, "Are Queued" appears next to the menu option Sched Procs. For more

information regarding the Output Parameters and Scheduling window, see the *Getting Started User Guide*

9. The Re-Import Exceptions program executes at the time you specify and sends e-mail informing you the process is complete.



# SECTION 7 - CHANGE TRANSACTION SEND FILES

## Overview

### Introduction

This section provides procedures to:

- Change guaranteed loan information
- Change guaranteed loan disbursement information
- Export Change Transaction Send files to the guarantor

### Before You Begin

Before you begin to use the following procedures for Change Transaction Send files, remember:

- Use this process for Loans and Disbursements with a minimum status of Guaranteed. This means the Loan record has already been created, exported to the guarantor, guaranteed by the guarantor and imported back to the Jenzabar system.
- If your institution is using the loan tracking module to send and receive loan tracking disbursement via electronic fund transfer (EFT), you must load the financial table entries to support the posting of EFT roster files.
- An ID record for the student must already exist on the system.
- The student has to complete the admission process, resulting in the creation of a Program Enrollment record for the student.
- Use the field descriptions in the *Using the Financial Aid Loan Screens* section of this guide when you complete the fields on the screens discussed in this section.
- You must certify the loan before you can export it to the service provider. For information on how to certify a financial aid loan, see the *Certifying Financial Aid Loan Applications* section in this manual.

### Process

This list shows the general phases that take place before, during, and after creating Change Transaction Send files.

1. Access Financial Aid Loan and enter appropriate parameters for processing financial aid summary information.
2. Query to locate a student for whom you are changing a Loan record that has a minimum status of Guaranteed.
3. Select the type of loan you wish to change for a particular student.
4. Complete and save all field entries.
5. Exit the Loan Summary screen.
6. At the Financial Aid: Loan Tracking Main menu select **Export Loans**.
7. At the Export Loans Parameters screen, select **Change Requests**.
8. Enter and complete Output parameters.

# Changing Guaranteed Financial Aid Loan Information

## How to Change a Guaranteed Loan Record

Follow these steps to change the information on a guaranteed Loan record.

1. Access the Loan Summary screen for the desired student. For information on how to access the Financial Aid Loan Summary screen, see *Accessing Financial Aid Loan Information* in the *Adding Or Updating Financial Aid Loan Information* section of this manual.
2. At the Loan Summary screen, select the type of loan for which you wish to change Loan record information. Valid options are:
  - **S** (Stafford)
  - **P** (PLUS)
  - **M** (Master-Promissory-Note)
  - **A** (Alternate)

**Note:** You cannot use the Stafford menu option for Stafford loans created during the 2000-2001 financial aid award year and beyond. If you wish to access a Stafford loan beginning with the 2000-2001 financial aid award year, select **Master-prom-note** from the Commands menu. For more information, see the *Adding or Updating Financial Aid Loan Information* section in this manual.

3. The first Loan record of this type appears. Does the student have more than one of this type of Loan record?
  - If yes, select **Next** from the Commands menu until the desired Loan record is displayed. Go to step 4.
  - If no, go to step 4.
4. In order to create a Change Transaction Send file, the Loan record must have a minimum status of Guaranteed. This means that this Loan record has already been created, exported to the guarantor, guaranteed by the guarantor, and imported back to the Jenzabar system. Does this Loan record have a minimum status of Guaranteed?
  - If yes, go to step 5.
  - If no, you must use the Update process to change the Loan record information. For more information see the *Adding Or Updating Financial Aid Loan Information* section of this manual.
5. Select **Update** from the Commands menu. A message window appears telling you that this loan has already been exported from CX, is guaranteed, and that the changes you wish to make will be included in the next Change Request file for export. The message window asks you if you wish to continue. Do you wish to continue?
  - If yes, select **Yes**. Another message window appears asking you whether you wish to log your changes. Select one of the following options:
    - Log changes - the Log History feature is activated and you are returned to the current Loans screen in Update mode. Go to step 6.
    - Don't log changes - the Log History feature is not activated and you are returned to the current Loans screen in Update mode. Go to step 6.
    - Cancel - You are returned to the current Loans screen in Display mode with no changes made to the current Loan record. Go to step 7.
  - If no, select **No**. You are returned to the current Loans screen in Display mode with no changes made to the current Loan record. Go to step 7.
6. Make the desired changes to the current Loan record and select **Finish** from the Commands menu. You have successfully updated the current Loan record. You are returned to the current Financial Aid Loans screen.

7. Do you wish to change another Loan record with a minimum status of Guaranteed for this student?
  - If you wish to update the same type of loan (e.g., MPN, PLUS, or Alternate), select **Next** or **Previous** from the Commands menu until the desired Loan record is displayed and go back to step 4.
  - If you wish to update a different type of loan (e.g., MPN, PLUS, or Alternate), select **Close** from the Commands menu. You are returned to the Loan Summary screen. Go back to step 2.
  - If you do not wish to update another Loan record for this student, select **Close** from the Commands menu. You are returned to the Loan Summary screen.
8. Do you wish to continue to update Loan records with a minimum status of Guaranteed for other students?
  - If yes, go back to step 1.
  - If no, select **Exit** from the Commands menu. A message appears asking if you are sure that you wish to exit.
    - If yes, select **Yes**. You are returned to the Financial Aid: Loan Tracking Main menu.
    - If no, select **No**. You are returned to the Loan Summary screen. Go back to step 1.

# Changing Guaranteed Financial Aid Loan Disbursement Information

## How to Change a Guaranteed Loan Disbursement Record

Follow these steps to change the information on a guaranteed Loan Disbursement record.

1. Access the Loan Summary screen for the desired student. For information on how to access the Financial Aid Loan Summary screen, see *Accessing Financial Aid Loan Information* in the *Adding Or Updating Financial Aid Loan Information* section of this manual.
2. At the Loan Summary screen, select the type of loan for which you wish to change Loan Disbursement record information. Valid options are:
  - **S** (Stafford)
  - **P** (PLUS)
  - **M** (Master-Promissory-Note)
  - **A** (Alternate)

**Note:** You cannot use the Stafford menu option for Stafford loans created during the 2000-2001 financial aid award year and beyond. If you wish to access a Stafford loan beginning with the 2000-2001 financial aid award year, select **Master-prom-note** from the Commands menu. For more information, see the *Adding or Updating Financial Aid Loan Information* section in this manual.

3. The first Loan record of this type appears. Does the student have more than one of this type of Loan record?
  - If yes, select **Next** from the Commands menu until the desired Loan record is displayed. Go to step 4.
  - If no, go to step 4.
4. In order to create a Change Transaction Send file, the Loan record must have a minimum status of Guaranteed. This means that this Loan record has already been created, exported to the guarantor, guaranteed by the guarantor, and imported back to the CX system. Does this Loan record have a minimum status of Guaranteed?
  - If yes, go to step 5.
  - If no, you must use the Update process to change the Loan Disbursement record information. For more information see the *Adding Or Updating Financial Aid Loan Information* section of this manual.
5. Select **Disbursements** from the Commands menu. A Message window appears telling you that this loan has already been exported from CX, is guaranteed, and that the changes you wish to make will be included in the next Change Request file for export. The message window asks you if you wish to continue. Do you wish to continue?
  - If yes, select **Yes**. Another message window appears asking you whether you wish to log your changes. Select one of the following options:
    - Log changes - The Loan Tracking Entry (Disbursements) window appears in Update mode. The Log History feature is activated. Go to step 6.
    - Don't log changes - The Loan Tracking Entry (Disbursements) window appears in Update mode. The Log History feature is not activated. Go to step 6.
    - Cancel - You are returned to the current Loans screen in Display mode with no changes made to the current Loan Disbursement record. Go to step 7.
  - If no, select **No**. You are returned to the current Loans screen in Display mode with no changes made to the current Loan Disbursement record. Go to step 7.
6. Make the desired changes to the current Loan Disbursement record and select **Finish** from the Commands menu. For more information, see the *Creating And Updating Financial Aid Loan Disbursement Schedules* section in this manual. You have successfully updated the

current Loan Disbursement record. You are returned to the current Financial Aid Loans screen.

7. Do you wish to change another Loan Disbursement record with a minimum status of Guaranteed for this student?
  - If you wish to update the same type of Loan Disbursement record (e.g., MPN, PLUS, or Alternate), select **Next** or **Previous** from the Commands menu until the desired Loan record is displayed and go back to step 4.
  - If you wish to update a different type of Loan Disbursement record (e.g., MPN, PLUS, or Alternate), select **Close** from the Commands menu. You are returned to the Loan Summary screen. Go back to step 2.
  - If you do not wish to update another Loan Disbursement record for this student, select **Close** from the Commands menu. You are returned to the Loan Summary screen.
8. Do you wish to continue to update Loan records with a minimum status of Guaranteed for other students?
  - If yes, go back to step 1.
  - If no, select **Exit** from the Commands menu. A message appears asking if you are sure that you wish to exit.
    - If yes, select **Yes**. You are returned to the Financial Aid: Loan Tracking Main menu.
    - If no, select **No**. You are returned to the Loan Summary screen. Go back to step 1.

# Exporting Change Transaction Send Files

## How to Export Change Transaction Send Files

Follow these steps to send Change Transaction files to the guarantor.

1. From the Financial Aid: Loan Tracking Main menu, select **Export Loans**. The Export Loans Parameters screen appears.
2. At the Export Loans Parameters screen, enter the appropriate values as follows:
  - The Financial Aid Year code for which you wish to export financial aid loans (e.g., 0001 for 2000-2001). Use **Table Lookup** for a list of valid codes.
  - The Program code for which you wish to process financial aid loans (e.g., UNDG for undergraduate). Use **Table Lookup** for a list of valid codes.
  - The Site code for your institution.
  - Select **N** (No) in the Original Applications field.
  - Select **Y** (Yes) in the Change Requests field.
3. Select **Finish**. The Output Parameters and Scheduling window appears.
4. At the Output Parameters window, place your cursor on the Time field and specify the time you want this process to execute, or enter **NOW** to execute it now.
5. In the Day field, enter the day you want this process to execute, or leave blank for the current date.
6. If **NOW** was selected for the time, enter **Y** in the Background parameters window to run this process in the background.

**Note:** If you entered **NOW** in the Time field, “Exist” appears next to the menu option Tasks. Otherwise, “Are Queued” appears next to the menu option Sched Procs. For more information regarding the Output Parameters and Scheduling window, see the *Getting Started User Guide*.

7. Select **Finish**. The Financial Aid: Loan Tracking Main menu appears.
8. The Export Loans program executes at the time you specify and sends e-mail informing you the process is complete.
9. The export files are placed in the *pcfin* directory and downloaded in the same manner as other EDE files. Once the export files are on the PC, the files are brought into third party software and sent to the service provider. The service provider responds with an acknowledgment, which is uploaded onto the CX system via the *pcfin* process. The files are read and loaded using *tpconvert* to update the Loan record and Loan Disbursement record statuses.

# SECTION 8 - EXPORTING OR IMPORTING FINANCIAL AID LOAN INFORMATION

## Overview

### Introduction

This section provides procedures to:

- Electronically export the following to the service provider:
  - Loan applications
- Electronically import the following from the service provider:
  - response file
  - Disbursement rosters

### Before You Begin

Before you begin to use the following procedures for exporting and importing financial aid loan applications, remember:

- If your institution is using the loan tracking module to send and receive loan tracking disbursement via electronic fund transfer (EFT), you must load the financial table entries to support the posting of EFT roster files.
- An ID record for the student must already exist on the system.
- The student has to complete the admission process, resulting in the creation of a Program Enrollment record for the student.
- Use the field descriptions in the *Using the Financial Aid Loan Screens* section of this guide when you complete the fields on the screens discussed in this section.
- You must certify the loan before you can export it to the service provider. For information on how to certify a financial aid loan, see the *Certifying Financial Aid Loan Applications* section in this manual.

### Process

This list shows the general phases that take place before, during, and after importing and exporting Financial Aid Loan information.

1. Access Financial Aid: Loan Tracking Main menu.
2. Select either Export Loans or Import Loans and enter appropriate parameters for processing financial aid applications.
3. Enter and complete Output parameters.

# Exporting Financial Aid Loan Applications

## How to Export Financial Aid Loan Applications

Follow these steps to export financial aid loan applications to the service provider.

1. From the Financial Aid: Loan Tracking Main menu, select **Export Loans**. The Export Loans Parameters screen appears.
2. At the Export Loans Parameters screen, enter the appropriate values as follows:
  - The Financial Aid Year code for which you wish to export financial aid loans (e.g., 0001 for 2000-2001). Use **Table Lookup** for a list of valid codes.
  - The Program code for which you wish to process financial aid loans (e.g., UNDG for undergraduate). Use **Table Lookup** for a list of valid codes.
  - The Site code for your institution.
  - Do you wish to export original applications?
    - If yes, select **Y** in the Original Applications field, then select **Finish**. The Output Parameters and Scheduling window appears. Go to step 3.
    - If no, select **Cancel** from the Commands menu. You are returned to the Financial Aid : Loan Tracking Main menu.
3. Select **Finish**. The Output Parameters and Scheduling window appears.
4. At the Output Parameters window, place your cursor on the Time field and specify the time you want this process to execute, or enter **NOW** to execute it now.
5. In the Day field, enter the day you want this process to execute, or leave blank for the current date.
6. If **NOW** was selected for the time, enter **Y** in the Background parameters window to run this process in the background.

**Note:** If you entered **NOW** in the Time field, “Exist” appears next to the menu option Tasks. Otherwise, “Are Queued” appears next to the menu option Sched Procs. For more information regarding the Output Parameters and Scheduling window, see the *Getting Started User Guide*.
7. Select **Finish**. The Financial Aid: Loan Tracking Main menu appears.
8. The Export Loans program executes at the time you specify and sends e-mail informing you the process is complete.
9. The export files are placed in the *pcfin* directory and downloaded in the same manner as other EDE files. Once the export files are on the PC, the files are brought into third party software and sent to the service provider. The service provider responds with an acknowledgment, which is uploaded onto the CX system via the *pcfin* process. The files are read and loaded using *tpconvert* to update the Loan record and Loan Disbursement record statuses.

# Importing Financial Aid Loan Applications

## How to Import Financial Aid Loan Applications

Once you have exported the Loan records, the service provider reviews them and returns them to your institution with a status of guaranteed, incomplete, or denied. Follow these steps to import Loan records from the service provider.

1. From the Financial Aid: Loan Tracking Main menu, select **Import Loans**. The Import Loans Parameters screen appears.
2. At the Import Loans Parameters screen, enter the appropriate values as follows:
  - The Financial Aid Year code for which you wish to export financial aid loans (e.g., 0001 for 2000-2001). Use **Table Lookup** for a list of valid codes.
  - Do you wish to import the service provider's responses to the financial aid applications that you previously submitted?
    - If yes, select **Y** in the Application Response field.
    - If no, select **N** in the Application Response field.
  - Do you wish to import disbursement rosters from the service provider?
    - If yes, select **Y** in the Disbursement Rosters field. Go to step 3.
    - If no, select **N** in the Disbursement Rosters field. Go to step 4.
3. To import disbursement rosters, enter the appropriate values as follows:
  - The code for the type of journal you wish to post EFT disbursements (e.g., AC for Accounting Journal). Use **Table Lookup** for a list of valid codes.
  - The code for the type of document the agency uses for disbursements (e.g., ET for Loan Tracking EFT Wire). Use **Table Lookup** for a list of valid codes.
  - The EFT Station number.
  - The code for the entry type to post EFT disbursements (e.g., AID for Aid Issued). Use **Table Lookup** for a list of valid codes.
  - The code for the subsidiary to post EFT disbursements (e.g., A/P for Accounts Payable). Use **Table Lookup** for a list of valid codes.
  - The effective date (*mmdyyy*) of the journal to be posted for the roster file.
4. Select **Finish**. The Output Parameters and Scheduling window appears.
5. At the Output Parameters window, place your cursor on the Time field and specify the time you want this process to execute, or enter **NOW** to execute it now.
6. In the Day field, enter the day you want this process to execute, or leave blank for the current date.
7. If **NOW** was selected for the time, enter **Y** in the Background parameters window to run this process in the background.
8. Select **Finish**. The Financial Aid: Loan Tracking menu appears.

**Note:** If you entered **NOW** in the Time field, "Exist" appears next to the menu option Tasks. Otherwise, "Are Queued" appears next to the menu option Sched Procs. For more information regarding the Output Parameters and Scheduling window, see the *Getting Started User Guide*
9. The Import Loans program executes at the time you specify and sends e-mail informing you the process is complete.



# SECTION 9 - POSTING FINANCIAL AID LOANS TO STUDENT ACCOUNTS

## Overview

### Introduction

This section provides procedures to post loan disbursements received via EFT to student accounts.

### Before You Begin

Before you begin to use the following procedures for posting financial aid loan disbursements to student accounts, remember:

- If your institution is using the loan tracking module to send and receive loan tracking disbursement via electronic fund transfer (EFT), you must load the financial table entries to support the posting of EFT roster files.
- An ID record for the student must already exist on the system.
- The student has to complete the admission process, resulting in the creation of a Program Enrollment record for the student.
- Use the field descriptions in the *Using the Financial Aid Loan Screens* section of this guide when you complete the fields on the screens discussed in this section.

### Process

This list shows the general phases that take place before, during, and after posting financial aid loan disbursements to student accounts.

1. Access Financial Aid: Loan Tracking Main menu.
2. Select Post Loans to Student Acct.
3. Enter and complete Output parameters.
4. Select **Finish**. The Output Parameters and Scheduling window appears.
5. At the Output Parameters window, place your cursor on the Time field and specify the time you want this process to execute, or enter **NOW** to execute it now.
6. In the Day field, enter the day you want this process to execute, or leave blank for the current date.
7. If **NOW** was selected for the time, enter **Y** in the Background parameters window to run this process in the background.
8. Select **Finish**. The Financial Aid: Loan Tracking menu appears.  
**Note:** If you entered **NOW** in the Time field, "Exist" appears next to the menu option Tasks. Otherwise, "Are Queued" appears next to the menu option Sched Procs. For more information regarding the Output Parameters and Scheduling window, see the *Getting Started User Guide*.
9. The Post Loans to Student Accounts program executes at the time you specify and sends e-mail informing you the process is complete.



# SECTION 10 - USING THE FINANCIAL AID LOAN REPORTS

## Overview

### Introduction

This section provides:

- The procedure to generate and print reports
- Information about the standard reports you can produce using Financial Aid Loan

### How to Generate and Print Reports

When you select a report from a CX menu, comments on a parameter screen prompt you to enter the following types of parameters:

- Report (e.g., dates, IDs, or document numbers)
- Output (e.g., filenames, printers, dates, and times)

These parameters control the contents of the report and the time and type of output produced.

Follow these steps to generate any of the standard CX reports.

1. Access the desired Reports menu. Then, select the report you want to generate. A screen containing the processing parameters for the report appears.
2. Enter the required or relevant parameters. Then, select **Finish**. The Output Parameters and Scheduling window appears.
3. Indicate the type of output you want to produce and the time and day you want to generate the report. Select **Finish** either to generate the report or to schedule it for production on the specified date and time.

#### Notes:

- If you route the output to a file and do not define a name for the file, CX places the output in a file called *filename.out*, where *filename* is the technical name of the report. See *Reports for Financial Aid Loan* for the technical name for each report.
- For more information about using the Output Parameters and Scheduling window, see *Performing Background Tasks* and *Scheduling Processes* in the *Getting Started User Guide*.

# Reports for Financial Aid Loan

## Financial Aid Loan Reports

The following reports relate to Financial Aid Loan. You can produce each of these reports from the Loan Tracking: Reports menu:

### Loan Status Comparison Report

*Menu option:* Loan Status Comparison Report

*Technical name:* loanCmpr

*Parameters:*

**Minimum Status:** Required - The code indicating the minimum status the loan has achieved (e.g., A for Initially Processed). Use **Table Lookup** to select the desired code.

**Maximum Status:** Required - The code indicating the maximum status the loan has achieved (e.g., Z for Completed). Use **Table Lookup** to select the desired code.

*Description:* Lists financial aid loans that have achieved the minimum status, but not the maximum status you specify. This report displays each student's name, beginning and ending dates of the school year, and the specifics of the financial aid loan(s) for each student.

### Disbursement Roster Report

*Menu option:* Disbursement Roster Report

*Technical name:* disbRoster

*Parameters:*

**Journal Reference:** Optional - The code indicating the journal reference from which you wish to print disbursement information (e.g., AC for Accounting Journal). Use **Table Lookup** to select the desired code.

**Journal Reference No:** Optional - The Journal number that corresponds to the journal reference code.

*Description:* Lists the financial aid disbursements posted to the student's account. This report displays the student's name, social security number, type of financial aid loan, the date of the disbursement, and the amount of the disbursement.

### Loan Disbursement Exception Report

*Menu option:* Disbursement Exceptions

*Technical name:* loanDisbAmt

*Parameters:*

**Financial Aid Year:** Required - The code indicating the school year for which you wish to print loan format information (e.g., 0001 for the 2000-2001 school year). Use **Table Lookup** to select the desired code.

**Tolerance:** Optional - The tolerance level under which differences in amounts are ignored (e.g., 5.0).

*Description:* Identifies exceptional loan disbursement amounts such as loans that are guaranteed for an amount different than expected or loans disbursed for an amount different than they were guaranteed. Included are loans that disbursed but never guaranteed, or released but never disbursed.

# Loan Tracking Table Maintenance Reports

## Loan Tracking Table Maintenance Reports

The following reports relate to Financial Aid Loan. You can produce each of these reports from the Loan Tracking: Table Maintenance menu: (*This is true for now, it may change to Loan Tracking: Table Maintenance menu and Loan Table Maintenance: Reports menu – Check for release version Bb.*)

### Grade Level Table Report

*Menu option:* Grade Level Report

*Technical name:* tgradelvl

*Parameters:* (none)

*Description:* Lists the grade level, the loan service provider and whether or not the first disbursement of that loan should be held for thirty days. This report displays the contents of the Grade Level table.

### Loan Disbursement Report

*Menu option:* Loan Disbursement Report

*Technical name:* tloandisb

*Parameters:* (none)

*Description:* Lists the session and year, hold 30 date, and distribution date for each session. This report displays the contents of the Loan Disbursement table.

### Loan Format Table Report

*Menu option:* Loan Format Report

*Technical name:* tloanfmt

*Parameters:*

**Financial Aid Year:** Required - The code indicating the school year for which you wish to print loan format information (e.g., 9798 for the 1997-1998 school year). Use **Table Lookup** to select the desired code.

**Loan Origination Agency:** Optional - The code indicating the loan service provider from which you wish to print loan format information (e.g., Common for CommonLine loans).

**Record Type:** Optional - The code indicating the type of Loan record for which you wish to print loan format information (e.g., NEW\_DTL for Original App Send Detail Record).

*Description:* Lists import/export loan tracking format information. This report displays the contents of the Loan Tracking Format table.

### Loan Guarantor Table Report

*Menu option:* Loan Guarantor Report

*Technical name:* tloanguar

*Parameters:* (none)

*Description:* Lists the loan service provider agency, the agency's ID number, and the state from which the loan originates. This report displays the contents of the Loan Guarantor table.

### Loan Maximums Table Report

*Menu option:* Loan Maximums Report

*Technical name:* tloanmax

*Parameters:*

**Financial Aid Year:** Required - The code indicating the school year for which you wish to print loan maximum information (e.g., 9798 for the 1997-1998 school year). Use **Table Lookup** to select the desired code.

*Description:* Lists the maximum amount of financial aid allowed for each type of financial aid loan and for each grade level. This report displays the contents of the Loan Maximums table.

#### **Loan Origination Table Report**

*Menu option:* Loan Origination Report

*Technical name:* tloanorig

*Parameters:* (none)

*Description:* Lists the loan origination agencies that you can track through Financial Aid Loan. This report displays the contents of the Loan Origination table.

#### **Loan Period Table Report**

*Menu option:* Loan Period Report

*Technical name:* tloanprd

*Parameters:* (none)

*Description:* Lists the code for the loan period in which financial aid is disbursed (e.g., 3Q is Fall 1997, Spring 1998, and Summer 1998 with 33% of the loan disbursed each term). This report displays the contents of the Loan Period table.

#### **Loan Status Table Report**

*Menu option:* Loan Status Report

*Technical name:* tloanstat

*Parameters:* (none)

*Description:* Defines valid loan status codes for the loan tracking module (e.g., E is for Entered). This report displays the contents of the Loan Status table.

#### **Loan Type Table Report**

*Menu option:* Loan Type Report

*Technical name:* tloantype

*Parameters:* (none)

*Description:* Defines valid loan types for the loan-tracking module (e.g., 01 for CommonLine Stafford Loan). This report displays the contents of the Loan Type table.

#### **Record Type Table Report**

*Menu option:* Record Type Report

*Technical name:* tloanrec

*Parameters:* (none)

*Description:* Defines loan tracking record type information (e.g., DSB\_DTL for Disbursement Roster Detail record). This report displays the contents of the Record Type table.

# SECTION 11 - RESPONDING TO SYSTEM MESSAGES

## Overview

### Introduction

This section provides the following information:

- Descriptions of the status, warning, field error, and fatal error messages that can appear while you are using Financial Aid Loan
- Information you need to respond to the status, warning, and error messages

### Four Types of Messages

Four types of messages can appear in Financial Aid Loan. The messages appear on the comment line, on the error line, in a dialog box, or in your e-mail. The types of messages are:

- Status message
- Field error message
- Warning message
- Fatal error message

### Descriptions of Message Types

This list describes each of the four types of messages by degree of severity.

#### Status

Assures you that the program is working properly when you select an option involving a long pause.

- Can appear after you select a command or option, type data, or press a key
- Appears on the comment line
- Requires no action by you

**Example:** "Opening files ..."

#### Field error

Tells you of an invalid field value entered, and provides valid field values from which to choose.

- Can appear after you enter an invalid code in a field
- Appears on the error line
- Requires you to select a valid code from those provided in the field error message, a table lookup, or a query, and enter it into the field

**Example:** "Valid values: (A, I)"

#### Warning

Informs you of a condition of which you must be aware in order to continue.

- Can appear after you select a command or option, type data, or press a key to begin or end a process that requires a decision
- Appears in a dialog box
- Requires you to act or make a decision
- Instructional; does not terminate processing

**Example:** "Are you sure you want to exit? (Y/N)"

#### Fatal error

Informs you of a serious problem occurring within the system.

- Can appear when the system is missing information (such as a required table or record) needed to continue processing, or when there is a program error
- Appears in a dialog box, or in your e-mail, and/or in your Jenzabar coordinator's e-mail

- Requires you to contact the Jenzabar coordinator immediately to resolve the problem
- Terminates processing

**Example:** "XXXX An unrecoverable error has occurred. Contact your Jenzabar coordinator."

### **E-mail Messages**

Occasionally, CX programs send status or error messages to your e-mail, as well as to the comment or error line. Programs do not send messages about background processes to the comment or error line, but only to your e-mail. Such messages tell you any of the following information:

#### **A process was completed successfully**

When you see this message, you can delete or save them according to your preferences or established policy.

#### **Errors have occurred while trying to complete a process**

When you see this message, tell your Jenzabar coordinator about the message to resolve the problem.

#### **Information cannot be found**

When you see this message, try the process again with new field values.

# Warning and Error Messages

## Messages You Might Receive

The following list contains examples of some of the field error, warning, and fatal error messages that can appear when you use Financial Aid Loan.

Warning messages do not affect program processing, while field error messages indicate problems you can correct by following the directions in the message. However, fatal error messages stop the processing of a program; if you receive a fatal error, contact your Jenzabar coordinator immediately.

### **ID ##### not found**

The CX database does not contain the student ID number ##### that you entered on the screen.

### **Loan disbursements must match Approval amount to be properly certified. Gross disbursements (\$XXX.XX) do not equal Approved amount (\$XXX.XX).**

You entered gross disbursement amounts that do not equal the approved disbursement amount. Access the Loan Tracking Entry (Disbursements) window and modify the entered gross disbursements to equal the approved loan amount.

### **Loan must have disbursements to be properly certified.**

You did not enter the gross disbursements on the Loan Tracking Entry (Disbursements) window. Access the Loan Tracking Entry (Disbursements) window and complete the Gross Disbursements field(s).

### **No more loans in that direction**

No more Financial Aid Loan records exist for this student in the current direction. Select either Next or Previous to view additional records.

### **Required fields are missing. Supply the required values or select Cancel.**

You did not complete all of the required fields on the current screen.

### **Student has no PARENT loans**

You have not created any Financial Aid (PLUS) Loan records for this student. You can either add a new record or select Cancel from the Commands menu.

### **Student has no STAFFORD loans**

You have not created any Financial Aid (Student) Loan records for this student. You can either add a new record or select Cancel from the Commands menu.

### **This loan is already certified. Do you wish to re-certify it?**

You have already certified the current Financial Aid Loan record. You can either re-certify the loan record or select Cancel from the Commands menu.



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