CHAPTER 1

Setting Up Direct Loans

You set up Direct Loans as mandated by the U.S. Department of Education. This chapter provides an overview of direct lending, lists prerequisites, and discusses how to:

- Set up financial aid item types.
- Set up promissory notes in Campus Community.
- Set up direct lending.
- Set up 150 percent Direct Subsidized Loan Limit (SULA)
- View system administration information.

Overview of Direct Lending

The William D. Ford Federal Direct Loan program was established to provide long-term academic loans to qualified students who are enrolled in facilities of higher education, vocational, technical, business and trade schools. The Federal Government provides the funds for direct loans directly to the student, bypassing an outside lender. Students who receive federal direct loan funds cannot receive FFEL (federal family education loan) funds during the same enrollment period.

The three types of direct loans are:

Direct Loan Type	Loan Characteristics
Direct Subsidized Stafford Loan	A student's eligibility for a Direct Subsidized Stafford loan is determined entirely on the student's ability to demonstrate financial need. The U.S. Department of Education subsidizes the interest; therefore, the borrower is not charged interest while they are enrolled in school at least half time, and during grace and deferment periods.
Direct Unsubsidized Stafford Loan	A student is eligible for a Direct Unsubsidized Stafford loan regardless of their financial situation. Borrowers are responsible for paying the interest on these loans.
Direct PLUS Loan	Direct PLUS loans enable parents to borrow on behalf of their dependent students who are enrolled at least half time. Borrowers are responsible for paying the interest on these loans. Direct Graduate/Professional PLUS loans, or Grad PLUS loans, are intended for graduate or professional students who borrow money for themselves. The award amount equals the COA less any financial aid for FAFSA applicants.

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The direct lending portion of the Financial Aid package is designed to help you process the Subsidized Stafford, Unsubsidized Stafford, and PLUS loans awarded to students attending your institution.

Before You Begin

Before you attempt to process Direct Loans, ensure that the following general Financial Aid items are set up.

- Start and end dates for your academic year on the Aid Year Table page, which are reported to COD (common origination and disbursement) on the origination file.
- Valid terms for your careers on the Valid Terms for Career page.

  The Loan Period Start and End dates must be accurately entered on this page. When the loan origination record is built, the loan period is calculated using the earliest loan period start and latest loan period end dates from the terms contained within the disbursement plan assigned to the loan award.
- Aggregate areas for each type (subsidized and unsubsidized) of direct loan on the Aggregate Aid Limit Table page.
- Disbursement split codes and disbursement split code formulas.

  A specific disbursement split code formula is required to support the disbursement feature that allows up to 20 disbursements for both Stafford and PLUS loans and provides the ability to reserve disbursements for post-disbursement adjustments.

Setting Up Financial Aid Item Types

You use the Financial Aid Item Types component to set up financial aid item types, as described in the chapter on setting up Packaging basics; this section is provided to help you select the correct values for Direct Loan financial aid item types. Only information specific to direct lending setup is provided.

This section discusses how to:

- Define financial aid item types.
- Set up financial aid item type awarding rules.
- Set up financial aid item type award attributes.
- Set up financial aid item type award limits.
- Set up financial aid item type disbursement rules.
- Set up financial aid item type loan fees.

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Pages Used to Set Up Financial Aid Item Types

Page Name	Definition Name	Navigation	Usage
FA Item Type 1	ITEM_TYPE_FA_1	Set Up SACR, Product Related, Financial Aid, Awards, Financial Aid Item Types, FA Item Type 1	Define financial aid item type descriptions, enter effective dates, and enter other basic information for your financial aid item types.
FA Item Type 2	ITEM_TYPE_FA_6	Set Up SACR, Product Related, Financial Aid, Awards, Financial Aid Item Types, FA Item Type 2	Define awarding and rounding rules. Establish how the financial aid item type affects FM or IM need and enter rounding and remainder rules for the financial aid item type.
FA Item Type 3	ITEM_TYPE_FA_3	Set Up SACR, Product Related, Financial Aid, Awards, Financial Aid Item Types, FA Item Type 3	Define disbursement and anticipated aid rules. Update anticipated aid information, authorization for disbursement, and award letter information.
FA Item Type 4	ITEM_TYPE_FA_4	Set Up SACR, Product Related, Financial Aid, Awards, Financial Aid Item Types, FA Item Type 4	Set minimum and maximum award limits by the type of term (term category) as required.
FA Item Type 5	ITEM_TYPE_FA_5	Set Up SACR, Product Related, Financial Aid, Awards, Financial Aid Item Types, FA Item Type 5	Define default disbursement plans and split codes for each academic career, which enables you to enter data quickly on the award entry pages manually as well as for award rules on packaging plans.
FA Item Type 6 page	ITEM_TYP_FA_LN_FEE	Set Up SACR, Product Related, Financial Aid, Awards, Financial Aid Item Types, FA Item Type 6	Attach loan fee codes for loan item types.

Defining Financial Aid Item Types

Access the FA Item Type 1 page (Set Up SACR, Product Related, Financial Aid, Awards, Financial Aid Item Types, FA Item Type 1).

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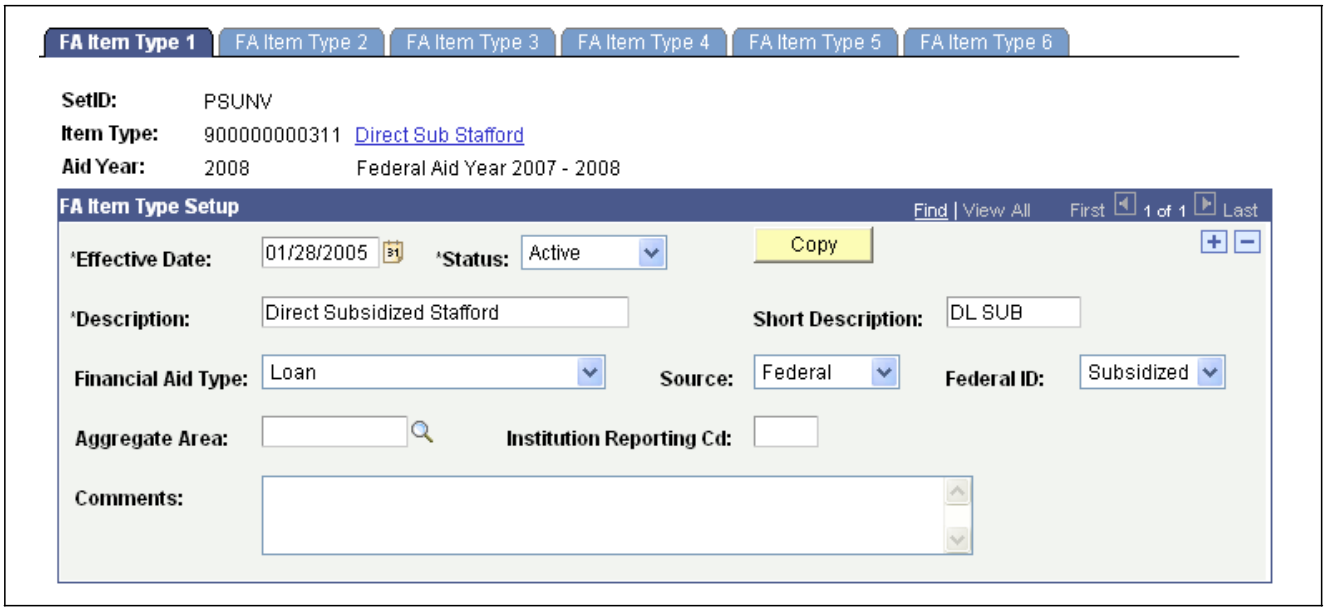

FA Item Type 1 page

This table describes how to enter field information for each type of direct lending loan.

Field	Subsidized Stafford	Unsubsidized Stafford	PLUS	Graduate PLUS
Description	Enter a descriptive statement indicating a Direct Subsidized Stafford loan.	Enter a descriptive statement indicating a Direct Unsubsidized Stafford loan.	Enter a descriptive statement indicating a PLUS loan.	Enter a descriptive statement indicating a Graduate PLUS loan.
Financial Aid Type	*Loan*	*Loan*	*Loan*	*Loan*
Source	*Federal*	*Federal*	*Federal*	*Federal*
Federal ID	*Subsidized*	*Unsubsidized*	*PLUS*	*Grad PLUS*
Aggregate Area	Name of the aggregate area you set up for this type of loan.	Name of the aggregate area you set up for this type of loan.	Leave this field blank.	Leave this field blank.

Setting Up Financial Aid Item Type Awarding Rules

Access the FA Item Type 2 page (Set Up SACR, Product Related, Financial Aid, Awards, Financial Aid Item Types, FA Item Type 2).

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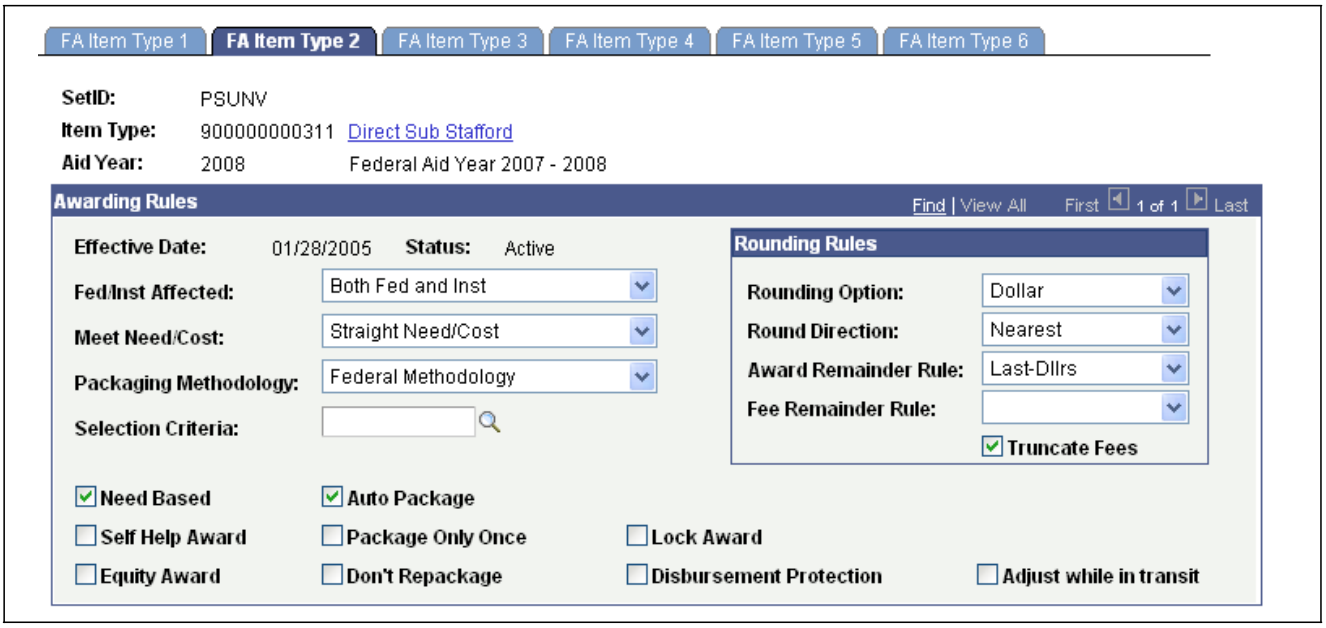

FA Item Type 2 page

The Rounding Rules entered on this page are the same for all Direct Loan types.

Rounding Option	Select *Dollar.*
Round Direction	Select *Nearest.*
Award Remainder Rule	Select *Last-Dllrs* (last dollars).
Fee Remainder Rule	Leave this field blank.
Truncate Fees	Select this check box.

Setting Up Financial Aid Item Type Award Attributes

Access the FA Item Type 3 page (Set Up SACR, Product Related, Financial Aid, Awards, Financial Aid Item Types, FA Item Type 3).

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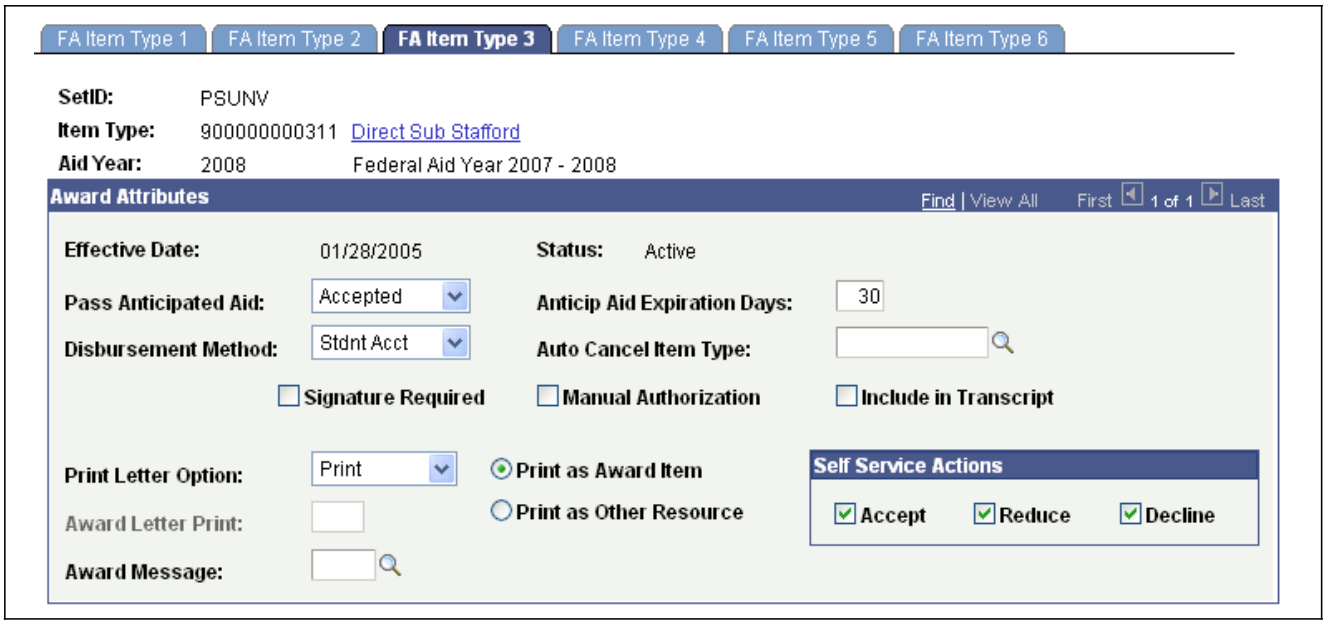
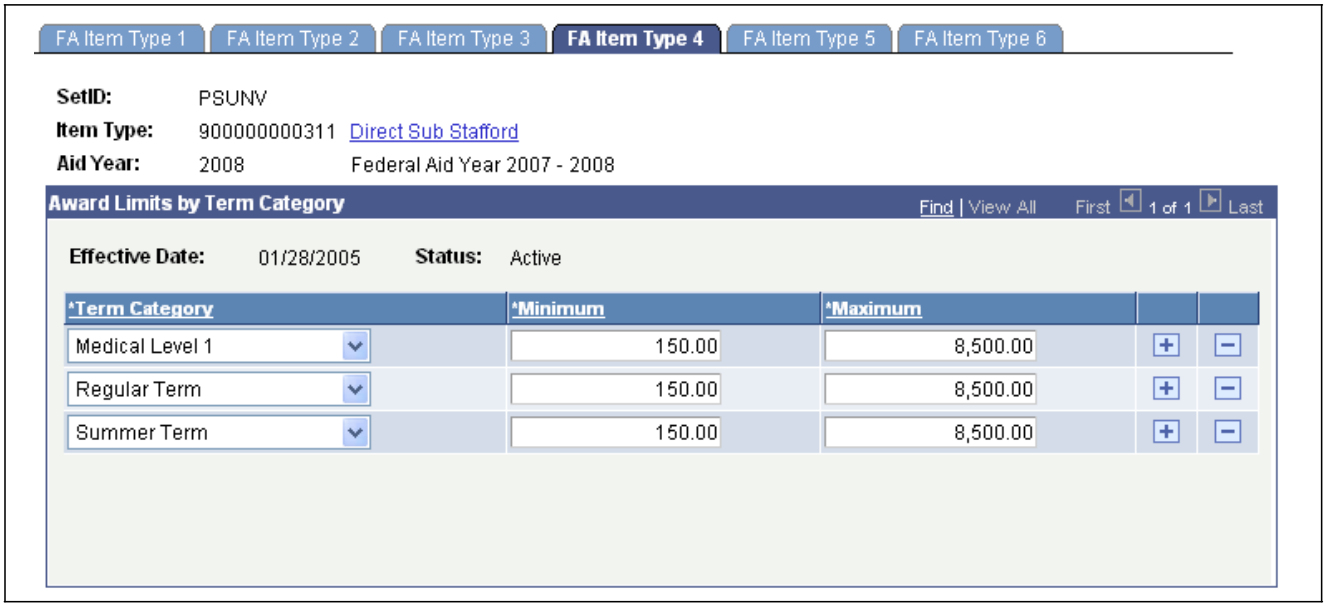


FA Item Type 3 page

The fields on this page are used to set up disbursement information. Set up these fields according to your institution's requirements. No specific Direct Loan requirements exist.

Setting Up Financial Aid Item Type Award Limits

Access the FA Item Type 4 page (Set Up SACR, Product Related, Financial Aid, Awards, Financial Aid Item Types, FA Item Type 4).



FA Item Type 4 page

The fields on this page are used to set up your award limits by term category. Your institution defines the limits. No specific Direct Loan requirements exist.

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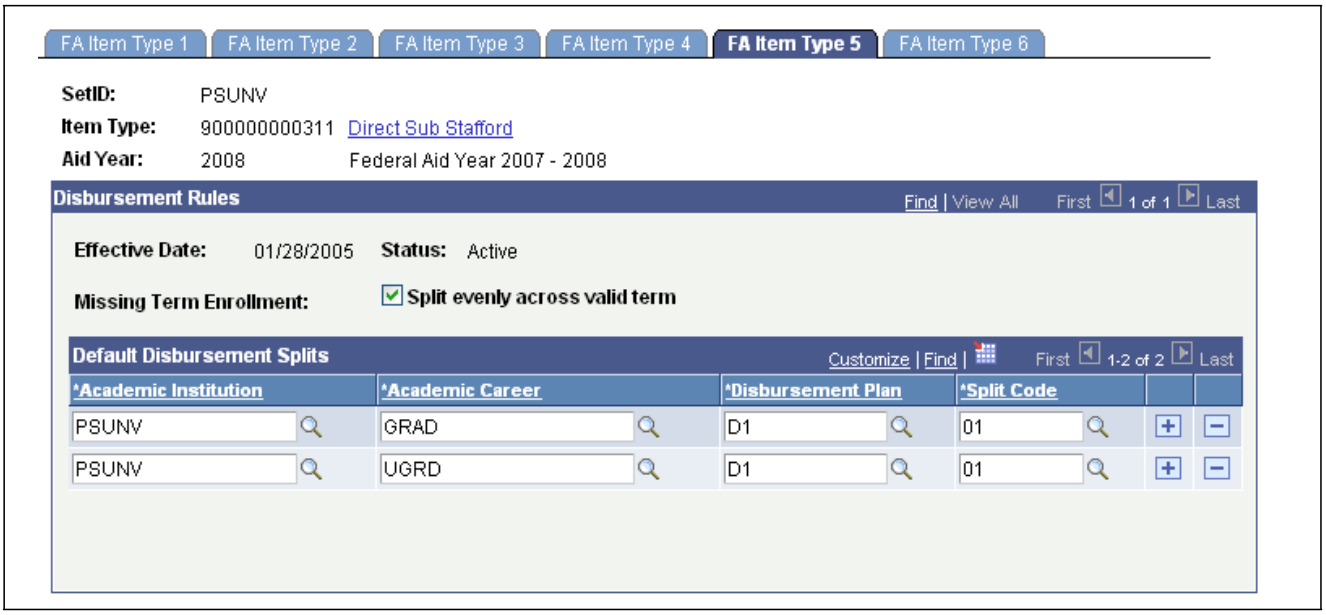
Setting Up Financial Aid Item Type Disbursement Rules

Access the FA Item Type 5 page (Set Up SACR, Product Related, Financial Aid, Awards, Financial Aid Item Types, FA Item Type 5).



FA Item Type 5 page

The field values entered on this page are the same for all Direct Loan types.

Missing Term Enrollment

Select the Split evenly across valid term check box for Direct Loan setup. Disbursement plans determine the disbursements across terms, but students might not attend all terms defined for the disbursement plan. The Missing Term Enrollment rule allows you to specify whether to split disbursements evenly among the remaining terms for which the student is actually enrolled.

For example, if the disbursement plan is for fall, winter, and spring quarters, but the student is only enrolled for fall and spring with the Split evenly across valid term check box selected, the award amount is split evenly between the fall and spring terms.

Setting Up Financial Aid Item Type Loan Fees

Access the FA Item Type 6 page (Set Up SACR, Product Related, Financial Aid, Awards, Financial Aid Item Types, FA Item Type 6).

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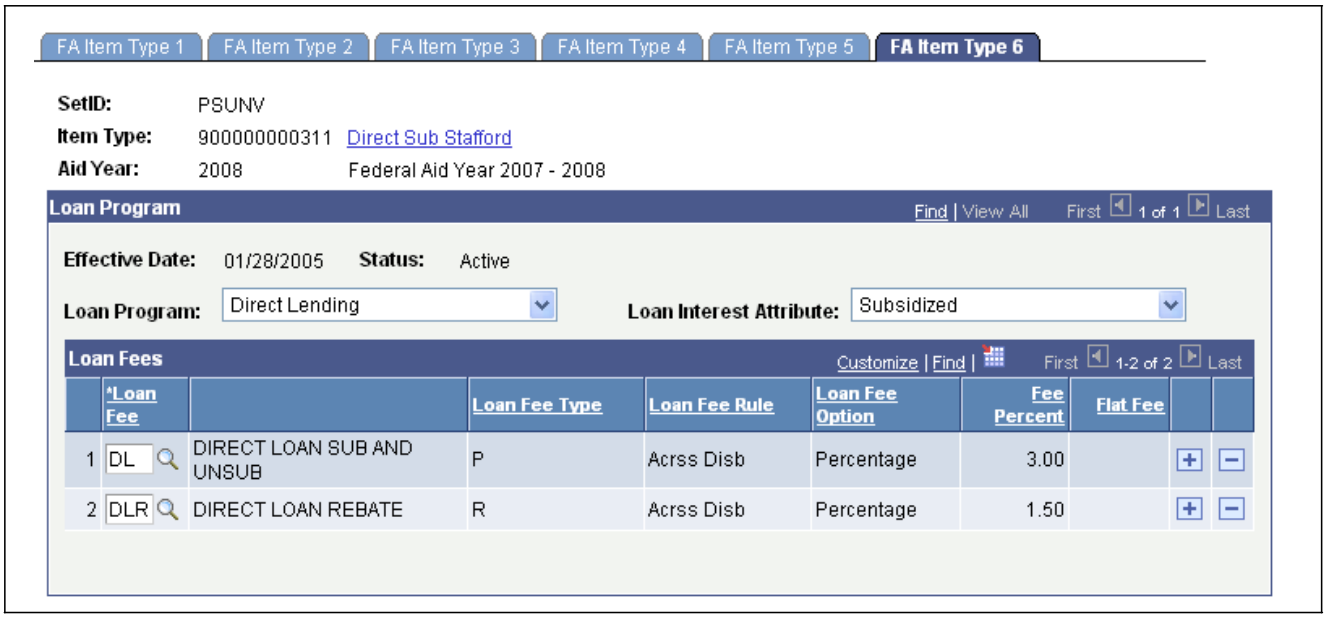

FA Item Type 6 page

Before you set up this page for your direct lending item types, you must create a loan fee type for your Stafford subsidized, Stafford unsubsidized, and PLUS loan types. You must also create a loan fee type for the rebate.

Field	Subsidized Stafford	Unsubsidized Stafford	PLUS or Graduate PLUS
Loan Program	Ensure that this field displays *Direct Lending*. The value comes from the aggregate area that you select on the Financial Aid Item Type 1 page.	*Direct Lending*	*Direct Lending*
Loan Interest Attribute	Ensure that this field displays *Subsidized* for subsidized Stafford loans. The value comes from the aggregate area you select on the Financial Aid Item Type 1 page.	Ensure that this field displays *Unsubsidized* for subsidized Stafford loans.	Ensure that this field displays *Unsubsidized* for PLUS or Graduate PLUS loans.
Loan Fees	Select your direct lending fee ID for subsidized Stafford loans.	Select your direct lending fee ID for unsubsidized Stafford loans.	Select your direct lending fee ID for PLUS or Graduate PLUS loans.

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Field	Subsidized Stafford	Unsubsidized Stafford	PLUS or Graduate PLUS
Loan Fees (interest rebate)	Insert a row to add interest rebate for the loan. Select the direct loan rebate fee that you set up on the Loan Fee Table page. The rebate amount is added after the loan fee percent is subtracted from the gross disbursement amount.	Same as for subsidized Stafford.	Same as for subsidized Stafford.
Fee Percentage	The loan fee values are derived from the Loan Fee Table.	The loan fee values are derived from the Loan Fee Table.	The loan fee values are derived from the Loan Fee Table.

Example of How the Direct Loan Rebate Works

A student receives a Direct Loan of 1,000.00 USD for the fall 2008 term. The net disbursed amount is 985.00 USD because the 3 percent loan fee of 30.00 USD is deducted from the gross amount of the loan, and the 1.5 percent rebate of 15.00 USD is added back.

Note. Refer to the COD Technical Reference guide regarding loan and rebate fees and their criteria when a new fee goes into effect. Separate financial aid item types and associated fees may be required based on the criteria and effective date.

All Direct Loan item types must have a “Loan Fee Type” (interest rebate), even if the fee rebate is equal to 0%. This attribute is necessary to support required COD reporting.

Setting Up Promissory Notes in Campus Community

Before using Master Promissory Notes (MPN) and Promissory Notes, you must complete setup procedures in PeopleSoft Campus Community and Financial Aid. The information in this section is specific to direct lending.

If you use the Create PNote Communication and Print Promissory Note processes, you can link a loan type to a specific document type.

If you have multiple loan types per loan program, you can have one checklist per loan type or you can have one checklist for all the loan types within a particular loan program.

Before setting up PeopleSoft Campus Community items for promissory notes, you should be familiar with and understand the 3Cs (communications, checklists, and comments), specifically checklists.

See [Understanding the 3Cs _mdash_ Communications, Checklists, and Comments]Understanding the 3Cs _mdash_ Communications, Checklists, and Comments .

See lscc, Setting Up Checklists, Understanding Checklist Setup.

This table lists the items that you must create in PeopleSoft Campus Community before you can use Master Promissory Notes (MPN) and Promissory Notes in PeopleSoft Financial Aid.

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Important! Schools can choose whether or not to use the Electronic Master Promissory Note (e-MPN) for their borrowers. If schools use the e-MPN, there is no need to print a paper version. If a borrower requests a paper MPN, the school has the option of having COD print and mail the MPN to the borrower. For more information,

See the U.S. Department of Education's *Common Origination and Disbursement (COD) Technical Reference*

Item	Direct Loan Information	Reference
Checklist Item	Create one checklist item code each for direct Stafford loan and direct PLUS loan type. **Note.** Be sure to use an effective date of 01/01/1900 for any rows you add.	See lscc, Setting Up Checklists, Setting Up Checklist Items, Defining Checklist Items.
Checklist Item Function	For the Administrative Function of *Loan,* insert a row for each of the checklist items that you created.	See lscc, Setting Up Checklists, Setting Up Checklist Items, Defining Checklist Items.
Checklist	Create one checklist each for direct Stafford loan and direct PLUS loans. Graduate PLUS loans can use the same elements as PLUS loans.	See lscc, Setting Up Checklists, Setting Up Checklist Templates, Creating a Checklist Template.
Checklist 3C Groups	Enter values in the Update/Inquiry Group. The Update/Inquiry Group values are user defined.	See lscc, Setting Up Checklists, Setting Up Checklist 3C Groups.
Communication Contexts	Set up a Communication Context for each checklist. Use these values: • Method = *Document* • Direction = *Outgoing* • Letter Code = *Loan Promissory Notes.* **Note.** The letter code is defined on the Standard Letters page in Campus Community.Set Up SACR, Common Definitions, Communications, Standard Letter Table CS.	See lscc, Setting Up Communications, Defining Communication Contexts and Categories.
Communication Categories	Choose the Communication Category designated for promissory note processing. For example, PNT_08 (Pnotes for 2008). Use these values: • Function = *Loan* • Communication Context = Insert rows for each of the communication contexts that you created. **Note.** Be sure to use an effective date of 01/01/1900 for any rows that you add.	See lscc, Setting Up Communications, Defining Communication Contexts and Categories.

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Item	Direct Loan Information	Reference
Communication 3C Groups	Select the Communication Category that you set up for promissory notes. For example, PNT_08. For the 3C Update/Inquiry Group field, select the 3C group to which to give access for the selected communication category. This field is required for promissory note processing ***Warning!*** If you do not set security, users have access to the communication category and administrative function needed to run the promissory notes functionality.	See lscc, Setting Up Communications, Defining 3C Groups.
Communication Speed Keys	Add new Communication Keys for MPN and PLUS loans. When adding the Communication Comm Keys, select *Loan* as the administrative function. Enter or select the values for each of the listed fields. Comm Key. Enter *MPN* for the MPN communication key, *PLUS* for the PLUS communication key. For Health, Perkins, and university/institutional loans, give each a unique communication key. Category. Enter the category you set up for MPN and PLUS loan communication categories. This value should match the name of the communication category that you set up previously. Context. Enter *MPN* for the MPN context field, *PLUS* for the PLUS context field. Method. Select the method to use to deliver the promissory note. This should match the method used when setting up the context. Direction. Select the direction, from your institution's point of view, that the promissory note is going. For example, outgoing refers to something sent out from your institution. This should match the method used when setting up the context. Letter Code. Select the appropriate letter code for the type of promissory note. You can have one letter code type for all loan type, for example, a letter code of LNS (loans).	See lscc, Setting Up Communications, Defining Communication Speed Keys.

Setting Up Direct Lending

To set up direct lending, use these components:

- Maintain EDI Transactions component (FA_ECTRANS).
- Create Loan Destinations component (LN_DEST_PROFILE).
- Direct Loan Change Rules component (LN_DL_INST_PARM).
- Define Loan Institutions component (LOAN_INST_TABLE).
- Loan Attended Routing ID component (SFA_COD_LN_ATTEND)
- Maintain Loan Report Packages component (LOAN_RPT_PKGS02).

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- Define Serial Promissory Notes component (LN_PNOTE_TYPE).
- Define School Servicers component (LOAN_SERVICE_TABLE).
- Maintain Loan Transfer ID component (LN_XFER_FILE_ID).
- Create Loan Types component (LOAN_TYPE).

This section discusses how to:

- View EDI profile defaults.
- Set up loan destination profiles for Direct Lending.
- Set up global Direct Lending change parameters.
- Set up Loan Institution Table for Direct Lending COD.
- Set up destination defaults for Direct Lending.
- Set up Loan Attended Routing ID's
- Set up loan report packages for Direct Lending.
- Set up DL Serial Promissory Note table.
- Set up Loan Servicer table for Direct Lending.
- Set up loan transfer IDs for Direct Lending.
- Set up loan types for Direct Lending.

Pages Used to Set Up Direct Lending

Page Name	Definition Name	Navigation	Usage
Financial Aid EDI Transactions	FA_ECTRANS	Set Up SACR, Product Related, Financial Aid, File Management, Maintain EDI Transactions, Financial Aid EDI Transactions	Define electronic data transactions.
Loan Dest Profile	LOAN_DEST_PROFILE	Set Up SACR, Product Related, Financial Aid, Loans, Commonline 4, Create Loan Destinations, Loan Dest Profile	Define the participants your institution uses to exchange loan application data. You can designate multiple destinations for a given loan program.
Ln Dl Inst Parm (loan direct lending institution parameter)	LN_DL_INST_PARM	Set Up SACR, Product Related, Financial Aid, Loans, Direct Loan Change Rules, Ln Dl Inst Parm	Set up change parameters for your institution. By setting change parameters for specific fields, you can determine how direct lending change processing handles the specified fields.

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Page Name	Definition Name	Navigation	Usage
Ln Pnote Type (loan promissory note type)	LN_PNOTE_TYPE	Set Up SACR, Product Related, Financial Aid, Loans, Define Serial Promissory Notes, Ln Pnote Type	Add the master promissory note (MPN), PLUS note, health, Perkins, and university/institutional loan types to the loan promissory note table. You must do this before using the promissory note functionality.
Loan Institution Table	LOAN_INST_TABLE	Set Up SACR, Product Related, Financial Aid, Loans, Define Loan Institutions, Loan Institution Table	Set up Common Origination and Disbursement (COD) for Direct Lending. Define how your school processes loans for the academic year. You must define your loan processes for each academic career at your institution.
Loan Institution Address Information	LN_INST_ADDR_SEC	Click the Loan Institution Contact link on the Loan Institution Table page.	Enter address information for your department that works with loans.
Loan Institution Contact Information	LN_INST_CNTCT_SEC	Click the Loan Institution Contact link on the Loan Institution Table page.	Enter address information for your loan contact personnel.
Loan Destination Default	LOAN_INST_TABLE2	Set Up SACR, Product Related, Financial Aid, Loans, Define Loan Institutions, Loan Destination Default	Set up your default loan destination parameters.
Loan Attended Routing ID	SFA_COD_LN_ATTEND	Set Up SACR, Product Related, Financial Aid, Loans, Loan Attended Routing ID	Associate Attended School Routing ID's with Reporting School Routing ID's.
Loan Report Packages	LN_RPT_PCKG02	Set UP SACR, Product Related, Financial Aid, Loans, Maintain Loan Report Packages, Loan Report Packages	Define and associate loan document types to loan types.
Loan Servicer Table	LOAN_SERVICE_TABLE	Set Up SACR, Product Related, Financial Aid, Loans, CommonLine4, Define School Servicers, Loan Servicer Table	Identify the servicers that your institution uses for processing loans. You can also use this page to add a new servicer.
Servicer Electronic Address	SERV_ADDR_SEC	Click the Electronic Address link on the Loan Servicer Table page.	Enter an email address for the loan servicer.
Servicer Contact Information	SERV_ADDR_SEC	Click the Contact Address link on the Loan Servicer Table page.	Enter address and email information for the individual contact that you entered on the Loan Servicer Table page.

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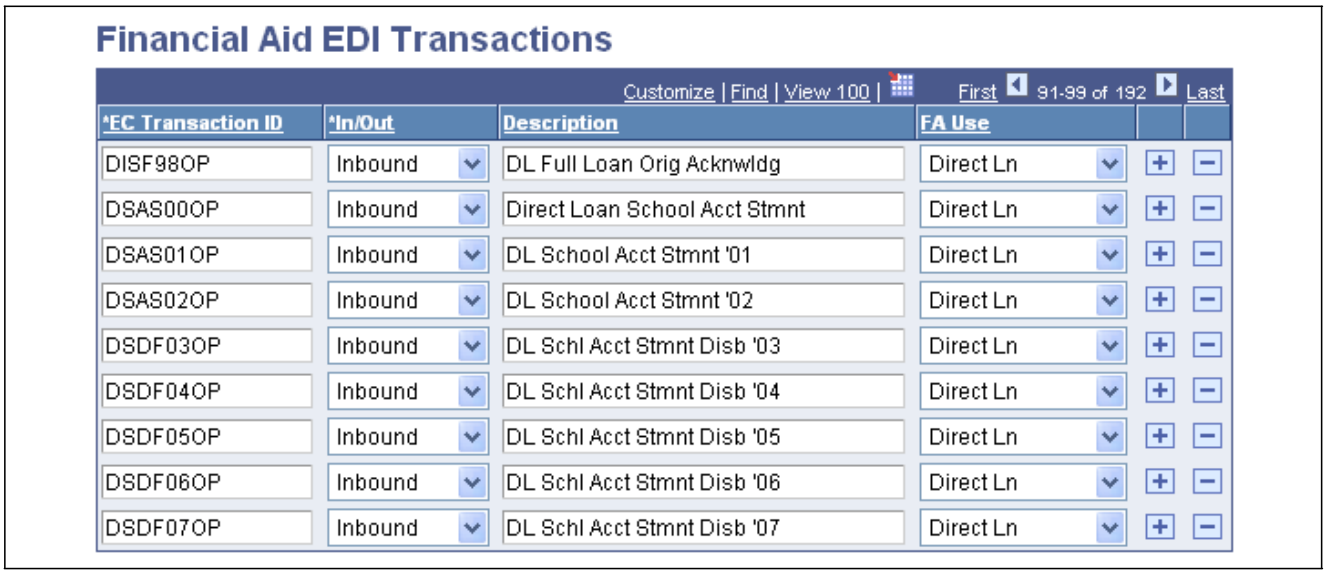
Page Name	Definition Name	Navigation	Usage
Loan Transfer IDs	LN_XFER_ID_UPDT	Set Up SACR, Product Related, Financial Aid, Loans, Maintain Loan Transfer ID, Loan Transfer IDs	Set up your EC transaction ID for all inbound and outbound loan file transactions.
Loan Type Table	LOAN_TYPE_TABLE	Set Up SACR, Product Related, Financial Aid, Loans, Create Loan Types, Loan Type Table	Enter specific processing types and loan requirements for a particular loan type. You can also associate specific loan item types to the loan type.
Direct Loan Options	LOAN_TYPE_TABLE_DL	Set Up SACR, Product Related, Financial Aid, Loans, Create Loan Types, Direct Loan Options	Specify direct lending options for the loan type setup. This page is used to define your disbursement options from Financial Aid to PeopleSoft Student Financials. Additional options define when disbursements are transmitted to the Common Origination and Disbursement (COD).
Checklist Setup	LOAN_TYPE_DOCUMENT	Set Up SACR, Product Related, Financial Aid, Loans, Create Loan Types, Checklist Setup	Define checklist to be associated with loan type.

Viewing EDI Profile Defaults

Access the Financial Aid EDI Transactions page (Set Up SACR, Product Related, Financial Aid, File Management, Maintain EDI Transactions, Financial Aid EDI Transactions).



Financial Aid EDIT Transactions page

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The EDI Profile table defines electronic data transactions both inbound and outbound for COD processing. PeopleSoft Student Administration uses the EDI functionality to exchange data from the COD system to PeopleSoft Student Administration. EDI transactions support data files for Direct Loans and Pell Grant. The system updates and populates the EC Transaction ID on a regulatory basis.

EC Transaction ID The ID is based on the message classes used for direct lending. See the *COD Technical Reference* for further information. Use the Add link to add additional EC transaction IDs for this partner profile. Add all the direct lending message classes that you use at your institution.

In/Out The system indicates whether the file is *Inbound* or *Outbound*.

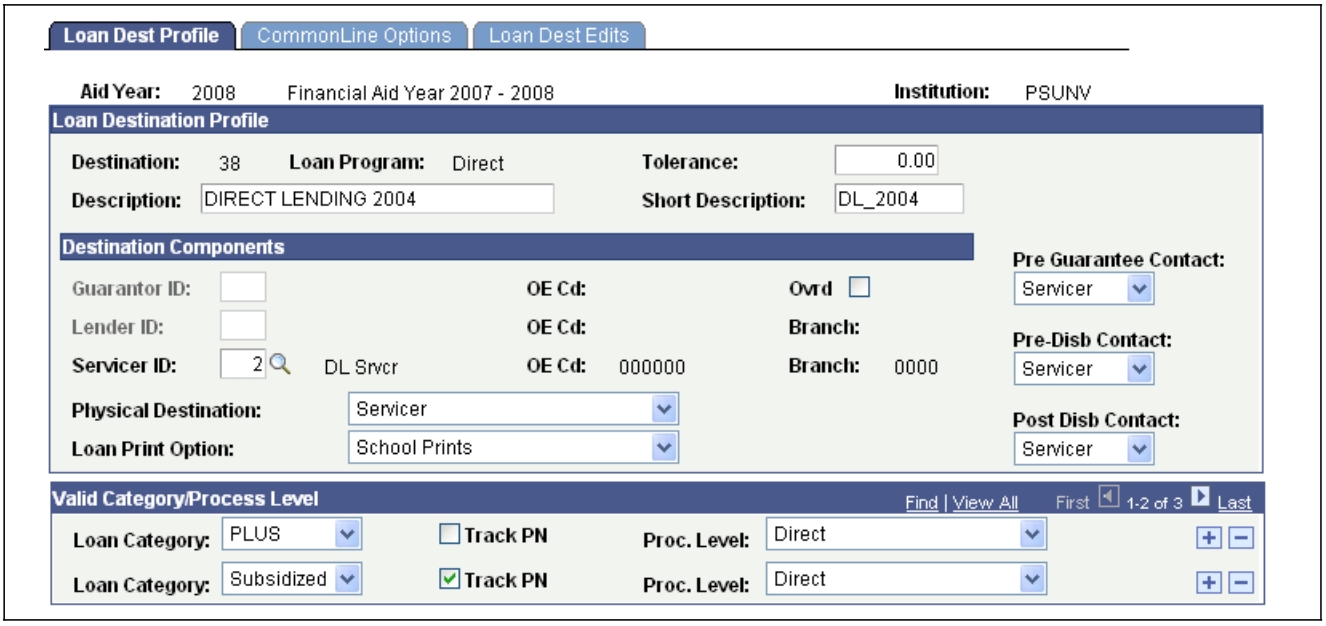
Direct Lending EC Transaction IDs

The following table illustrates the value provided in your system for Direct Lending processing. File types are updated during annual regulatory releases for Direct Lending.

EC Transaction ID	Inbound/Outbound	Data Exchange	File Type Data Definition
DSLFnnOP, where nn is the aid year.	Inbound	Import From COD	School Account Statement (Fixed-Length, Loan Level Loan Detail)
DSDFnnOP, where nn is the aid year.	Inbound	Import from COD	School Account Statement (Fixed-Length, Disbursement Level Loan Detail)

Setting Up Loan Destination Profiles for Direct Lending

Access the Loan Dest Profile page (Set Up SACR, Product Related, Financial Aid, Loans, Commonline 4, Create Loan Destinations, Loan Dest Profile).



Loan Dest Profile (loan destination profile) page

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Loan Destination Profile

Destination The system assigns and displays a unique numeric identifier when you create a destination.

Loan Program This should display *Direct* for direct lending.

Tolerance Enter the tolerance value to determine the amount difference that the system should allow with loans.

Destination Components

Guarantor ID This field does not apply to direct loans.

Lender ID This field does not apply to direct loans.

Servicer ID Select the servicer ID for direct lending. This value is delivered with your system.

OE Cd Branch (Office of Education code branch) The system displays the OE Cd and Branch for the Servicer ID that you select.

Physical Destination Select *Servicer* for direct lending. The physical destination refers to the destination that you intend to receive the loan application.

Loan Print Option Select the default promissory note print code to report to COD on each individual loan award. Value updates the COD Promissory Note Print Code field. Select the appropriate option depending on your institution's arrangement with COD. The Loan Print Option can also be overridden on an individual loan application level.

COD processing recommends leaving the Loan Print Option blank. If left blank, the 'Promissory Note Print Code' tag is not submitted, and the school's Promissory Note Print Indicator is set to 'Y'. When the Promissory Note Print Indicator is set to 'Y', this indicates to COD that the loan promissory note correspondence is eligible to be sent electronically by COD.

See the U.S. Department of Education's *Common Origination and Disbursement (COD) Technical Reference*, Electronic Master Promissory Notes and Submitting a Promissory Note Print Code.

- *Destination Prints (Sends to Borrower)* – COD prints and sends to borrower on paper format.
- *Destination Prints (Returns to School)* – COD prints and sends to school on paper format.
- *School Prints* – School prints on-site and provides to borrower.
- *Destination Reprints* – COD reprints and sends to borrower on paper format.
- *Destination Reprints (Sent to School)* – COD reprints and sends to school on paper format.

Ovrd (override) Select this check box to save the page without having designated a Guarantor ID, Lender ID, and Servicer ID. But, this does not apply to direct lending,

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so you can save the page with only the Servicer ID without selecting this check box.

Contact Order

The fields in this group box determine who to contact depending on the stage of the loan.

Pre-Guarantee Contact	Select *Servicer* for direct lending.
Pre-Disb Contact (pre-disbursement contact)	Select *Servicer* for direct lending.
Post Disb Contact (post disbursement contact)	Select *Servicer* for direct lending.

Valid Category/Process Level

Loan Category	Identify the loan category for the loan destination to process. The loan categories include *PLUS*, *Sub/Unsub*, *Subsidized*, and *Unsub*. The category *Sub/Unsub* does not apply to direct lending. Direct lending institutions should use *Subsidized*, *Unsub*, and *PLUS*. You should add a loan category for all three Direct Lending loan types: subsidized, unsubsidized, and PLUS.
Track PN (track promissory note)	This field does not apply to direct lending.
Proc. Level (process level)	Identify the loan processing level that the loan destination performs for the corresponding loan category. For direct lending, select *Direct* for all of your loan categories.

Note. The other two pages in this component, CommonLine Options and Loan Dest Edits, do not apply to direct lending.

Setting Up Global Direct Lending Change Parameters

Access the Ln Dl Inst Parm page (Set Up SACR, Product Related, Financial Aid, Loans, Direct Loan Change Rules, Ln Dl Inst Parm).

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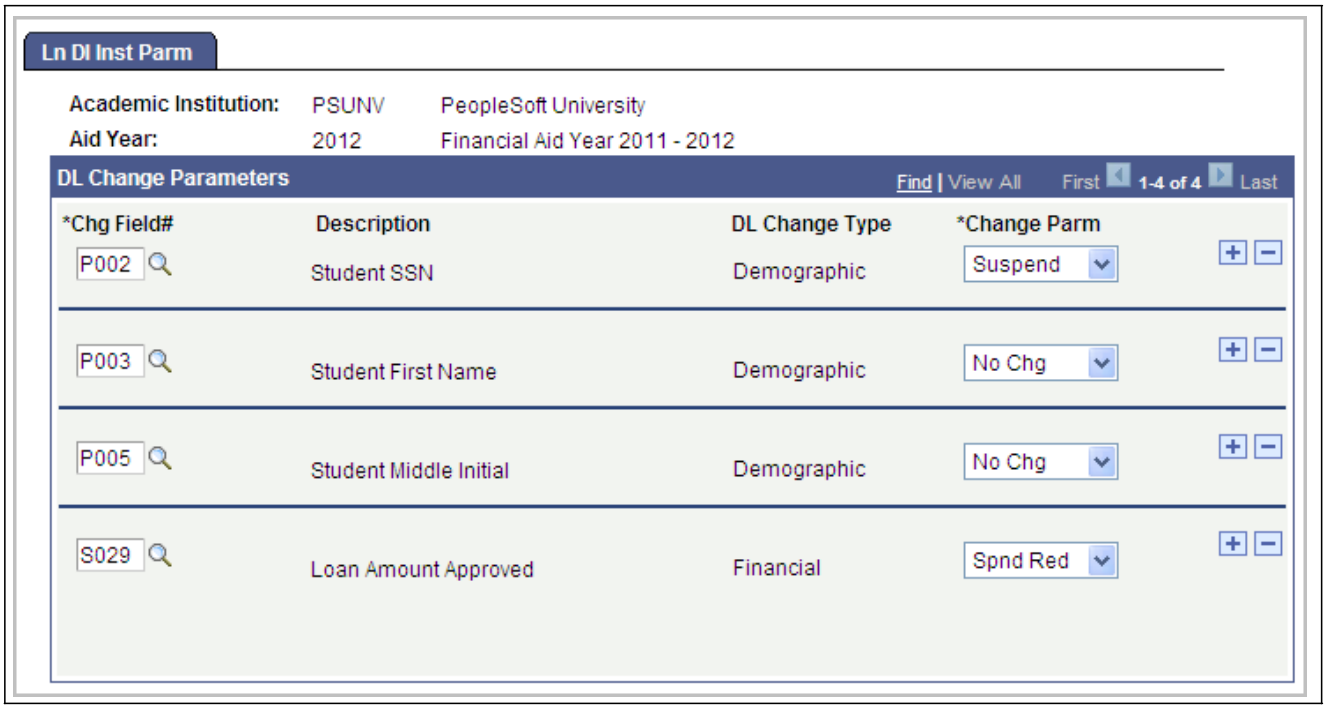

Ln Dl Inst Parm (loan direct lending institutional parameters) page

You can use this setup page to set globally what data changes should be automatically submitted to COD. These data changes can be for a change file, for a record held for institutional review, or for an automatically suspended record because of reductions to financial data. After these global parameters are defined, they are applied to all direct loan records to which changes to data have been made. This global setup assists you in administering what and when multiple data changes should be submitted to COD.

The global setup does not preclude you from holding/suspending change information on a student-by-student level. Individual suspend, change, or hold decisions can be made through the DL Stu Change Hold/Suspense page (Financial Aid, Loans, Direct Lending Management, Hold/Suspend Change Data).

The system displays the Academic Institution and Aid Year.

DL Change Parameters

Chg Field # (change field number)

Select the field to change. The change field numbers correspond to those assigned by COD, as defined in the *COD Technical Reference.*

DL Change Type

Indicates whether the specified change field number represents a demographic or financial change.

Change Parm (change parameter)

Select the parameter for each field.

No Chg (no change). The system does not consider the specified field during change processing. When you make changes to fields to which this change parameter is assigned, the system does not create a change transaction.

Note. Change rule processing analyzes all change fields by default unless a 'No Chg' value is specified.

Spnd Red (suspend reduced). This is used for financial change types only. If the change results in a reduced disbursement amount, the system suspends the loan.

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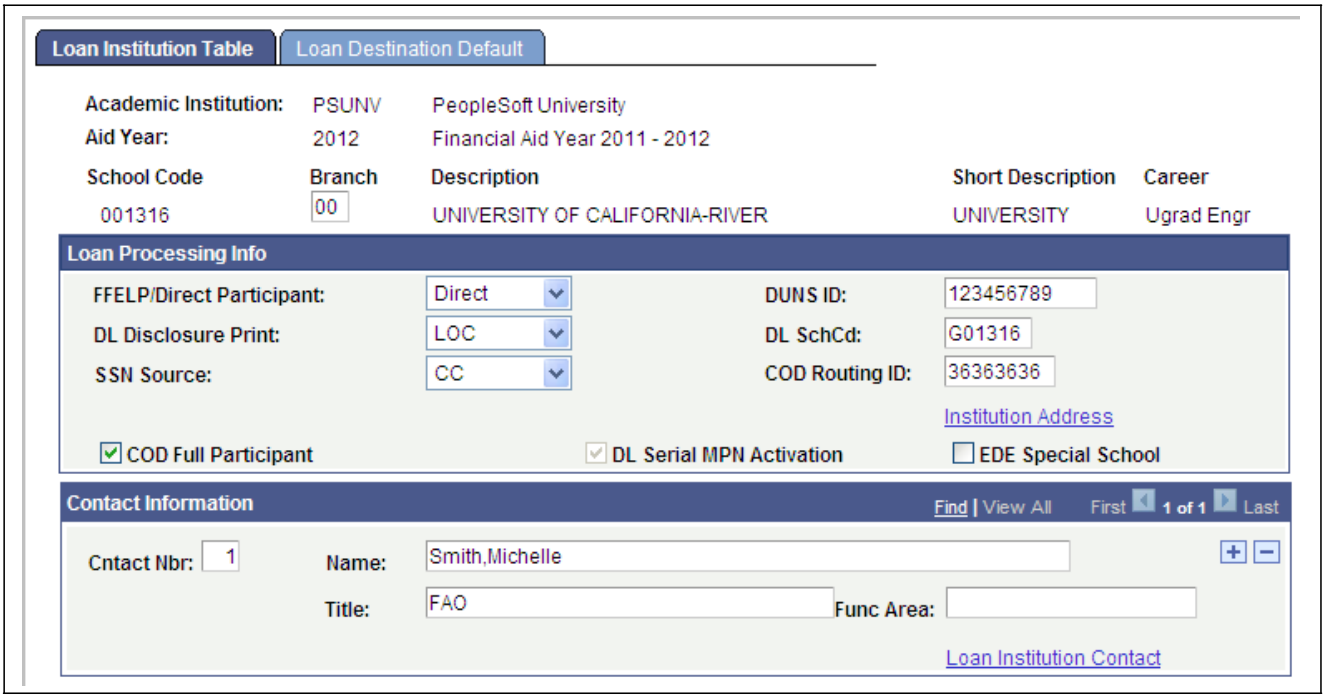
Suspend When you make changes to fields to which this change parameter is assigned, the system creates a change transaction and places the loan on hold. This enables you to review the loan to determine whether the change is appropriate. If the change is fine, you can remove the hold.

Note. The above change parameters affect those loans that have been transmitted to the COD. Prior to submission, you can change the fields on the loan record without generating a change transaction. Change transactions occur when you make changes to loans that you have previously transmitted to COD.

Setting Up Loan Institution Table for Direct Lending COD

Access the Loan Institution Table page (Set Up SACR, Product Related, Financial Aid, Loans, Define Loan Institutions, Loan Institution Table).



Loan Institution Table page

Loan Institution setup defines loan processing attributes and definitions. A student's awarded loans are matched to a Loan Institution option based on their ISIR Owning School Code, Academic Career, and FFELP/Direct Participant level.

Loan Processing Info

FFELP/Direct Participant Indicate whether your loan institution can originate *All Loans* (both FFELP and direct lending) *Direct* (Lending only), or *FFELP* (only). Alternative loans are not affected by this setting.

DL Disclosure Print Indicate where the loan disclosure is printed. Select from *COD*, *Reprint*, and *School*. *Reprint* indicates that the Department of Education has authorized the institution to reprint copies of the Direct Loan Disclosure Statement. In most cases, you should select COD.

SSN Source (social security number source) Indicate the source for the student's Social Security Number, *CC* (Campus Community) or *ISIR*.

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Note. The COD Direct Loan processes always report the SSN from the student's ISIR, regardless of the SSN Source option selected.

DUNS ID (data universal numbering scheme)	Enter your DUNS ID. The Department of Education assigns the DUNS number to the reporting institution.
DL SchCd (direct lending school code)	Enter your school code for direct lending. This field is hidden if your school does not participate in the direct lending program. School code is used to create the loan application ID for COD loan application processing.
COD Routing ID	Enter the Common School ID number that is assigned to your institution by the U.S. Department of Education. This value is used as the COD Routing ID for students associated with the context School Code, Career, and FFELP/Direct Participant level.
COD Full Participant	Select to activate the COD Common ID field.
DL Serial MPN Activation (direct lending serial master promissory note activation)	Displays as "checked" (default value) and is required for Direct Loan processing.
EDE Special School	Select this check box if your institution as been approved as an EDE special school.

Contact Information

In this group box, enter the contact information for each of your financial aid administrators in charge of loan processing.

Cntact Nbr (contact number)	Use this number to prioritize the list of contacts. The person with a contact number of one is considered the primary contact.
Name	Enter the name of the loan officer.
Title	Enter the title of the loan officer.
Func Area (functional area)	Enter information about the functional area that this contact person administrates.

Entering Loan Institution Address Information

Access the Loan Institution Address Information page (click the Loan Institution Contact link on the Loan Institution Table page).

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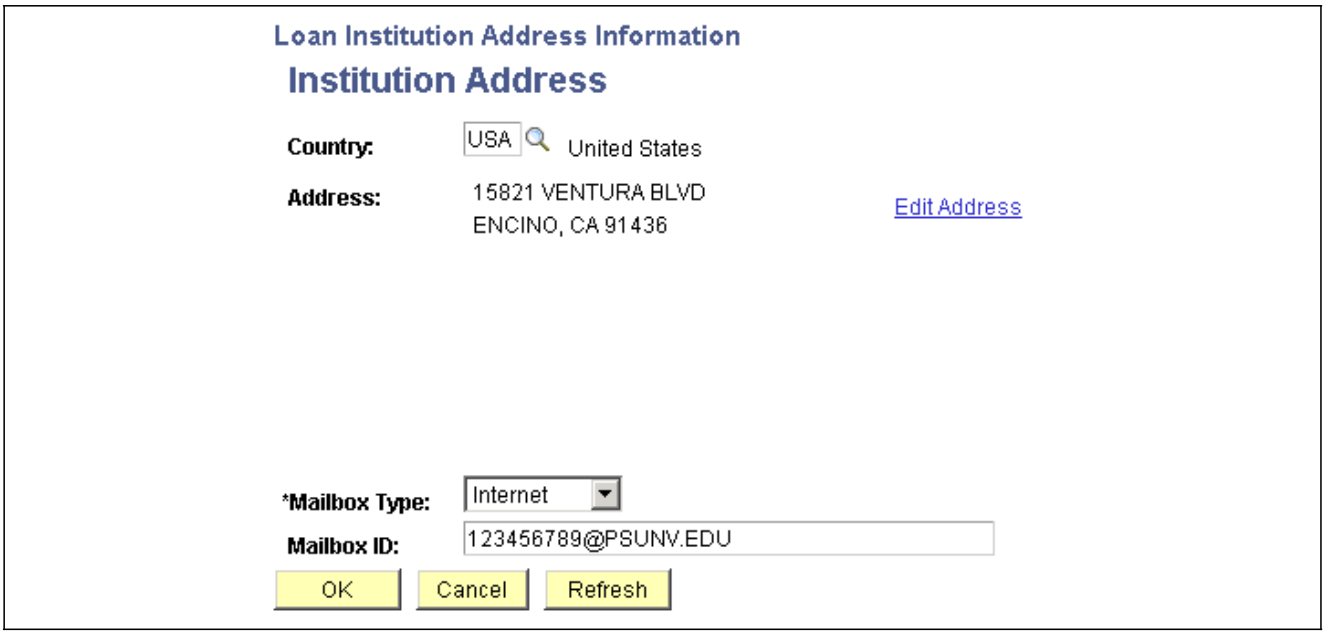

Loan Institution Address Information page

Enter the required address information. Select a Mailbox Type of either *Internet* or *Compuserve*. Enter a Mailbox ID or email address. The Mailbox Type and Mailbox ID are used to determine where data files are sent when the files are transmitted using the internet or a private communication network.

Note. You must enter a Mailbox Type and Mailbox ID to save this page.

Entering Loan Institution Contact Information

Access the Loan Institution Contact Information Loan Institution Contact page (click the Loan Institution Contact link on the Loan Institution Table page).

Loan Institution Contact Information page

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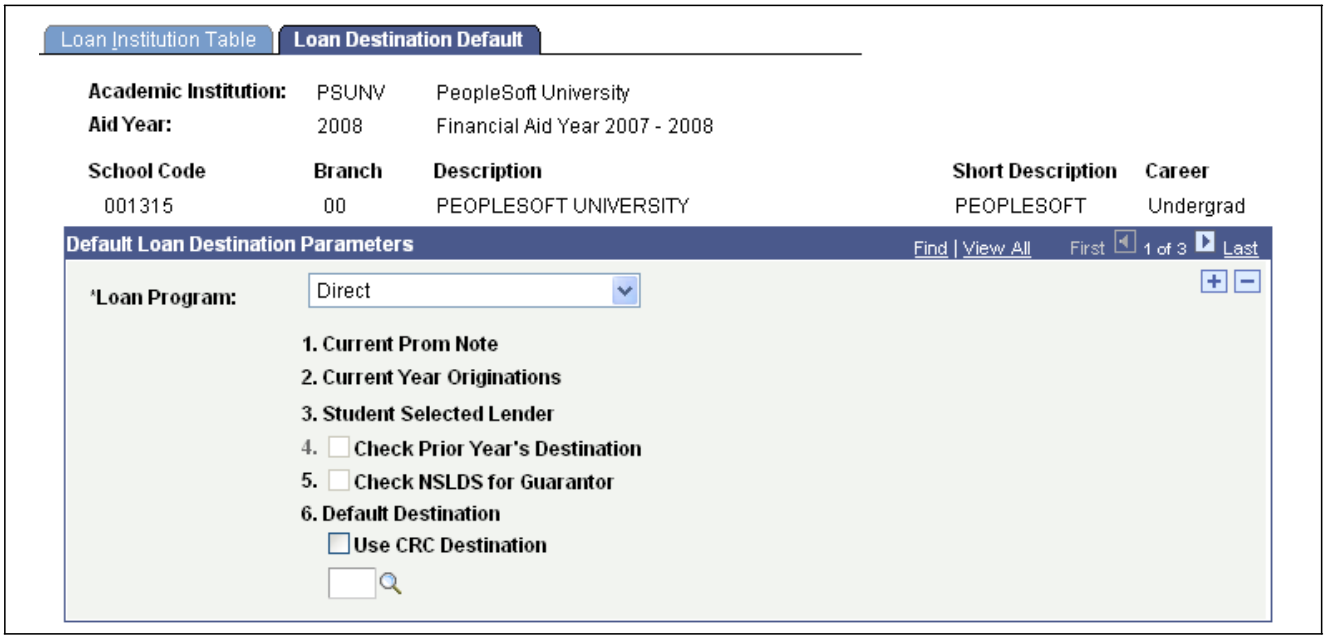
Enter the required address information for the individual loan contact. Select a Mailbox Type of either *Internet* or *Compuserve*. Enter the Mailbox ID or email address.

Setting Up Destination Defaults for Direct Lending

Access the Loan Destination Default page (Set Up SACR, Product Related, Financial Aid, Loans, Define Loan Institutions, Loan Destination Default).



Loan Destination Default page

Default Loan Destination Parameters

Loan Program Select *Direct* for direct lending.

6. Default Destination Indicates the default loan destination. Select the loan destination number that you created for this processing year for direct lending COD. The loan destination number is created on the Loan Dest Profile page.

Note. The 1. Current Prom Note, 2. Current Year Originations, 3. Student Selected Lender, 4. Check Prior Year Originations, and 5. Check NSLDS for Guarantor fields do not apply to direct lending.

Setting Up Attended School Routing ID's

Access the Attended School Routing ID page (Set Up SACR, Product Related, Financial Aid, Loans, Loan Attended Routing ID

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Loan Attended Routing ID page

Use this page to associate one or more COD Attended School Routing ID's to a single COD Reporting School Routing ID. Available Reporting School Routing ID values are based on unique COD Routing IDs established on the Loan Institution setup page.

Attending School Routing ID Enter at least one Attending School Routing ID.

Note. Attending School Routing IDs must be created for each Aid Year requiring COD processing.

Setting Up Loan Report Packages for Direct Lending

Access the Loan Report Packages page (Set UP SACR, Product Related, Financial Aid, Loans, Maintain Loan Report Packages, Loan Report Packages).

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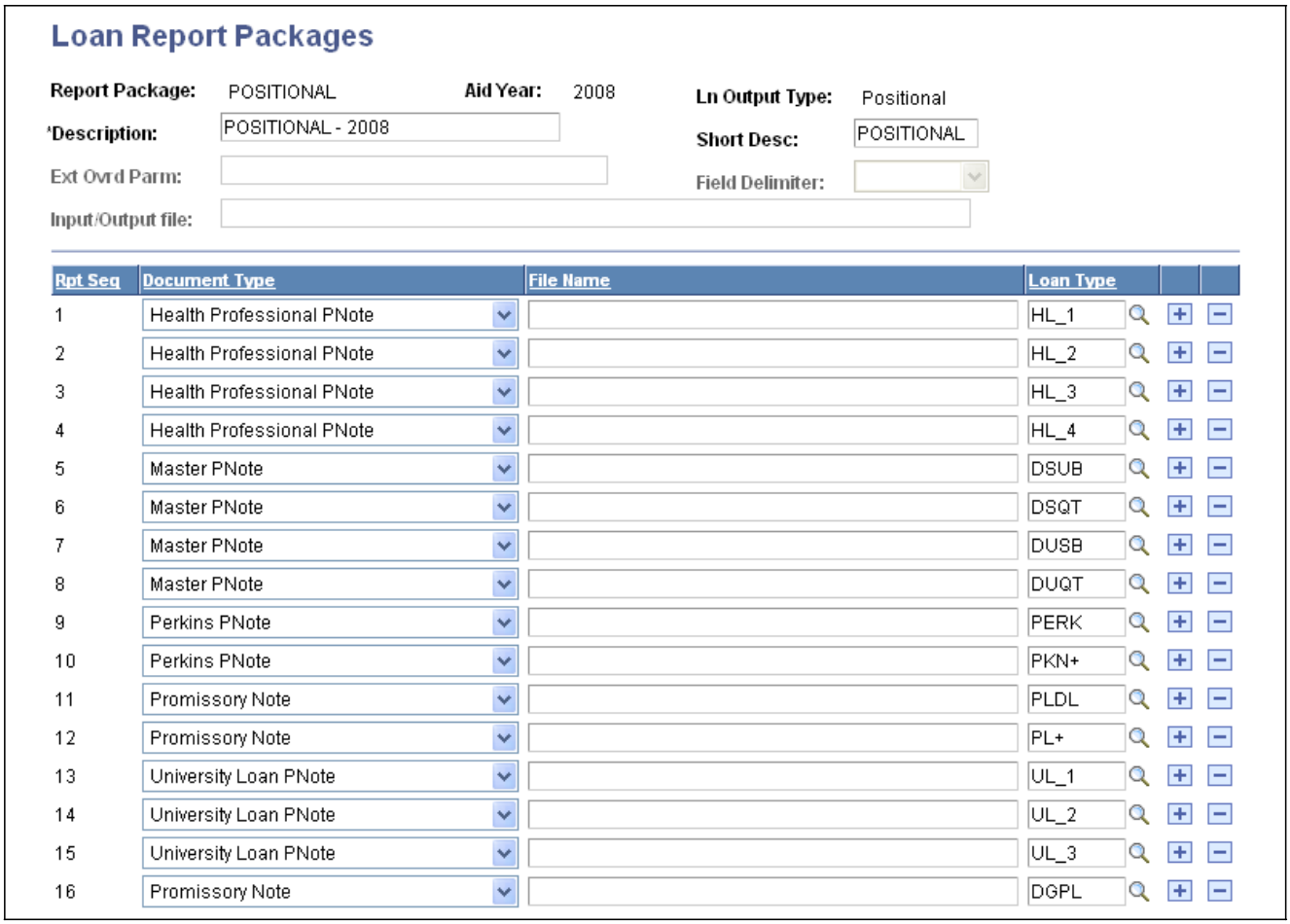

Loan Report Packages page

The Loan Report Packages page associates pre-defined promissory document types to Direct Loan types. You can print Federal Direct Subsidized and Unsubsidized Stafford and PLUS MPNs on preprinted forms approved by the Department of Education, using the positional print option. When the Office of Management and Budget (OMB) revises approved formats, Oracle delivers updated code to all schools.

Note. Direct PLUS Loan (this includes DL Graduate PLUS loans) master promissory notes print based on positional format with data labels.

Direct Subsidized and Direct Unsubsidized Stafford Loan master promissory notes print based on positional format without data labels.

The system displays the Report Package, Aid Year, and Ln Output Type (loan output type) based on your selection when accessing the page.

Ext Ovrd Parm (external override parameter)

If you are using an external product, you can enter values in this field using the guidelines set by the external product. This field appends parameters to the JOB line in the external product extract file. Review your external product user's guide.

Leave this field blank if you do not use an external product.

Field Delimiter

This field is not used for promissory note processing.

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Input/Output file

If you are using an external product, you must enter a file name to export the report package. This specifies where the output goes when you run the print process.

Leave this field blank if do not use an external product.

Rpt Seq (report sequence)

This designates the order in which the system creates the output for each loan document.

Document Type

These are delivered with your system. You must insert a new row for each loan document type to be included in the package:

Master PNote: Stafford MPN document type. Associate Stafford Subsidized and Unsubsidized loan type values with *Master PNote.*

Promissory Note: PLUS MPN document type. Associate PLUS and Graduate PLUS loan type values with *Promissory Note.*

File Name

If you are using an external product, you must enter the file name of the external product form to associate with the document type. For example, if the document type is Master Pnote, enter MPN0400_E. For document type Perkins Pnote, enter PERKNS_E.

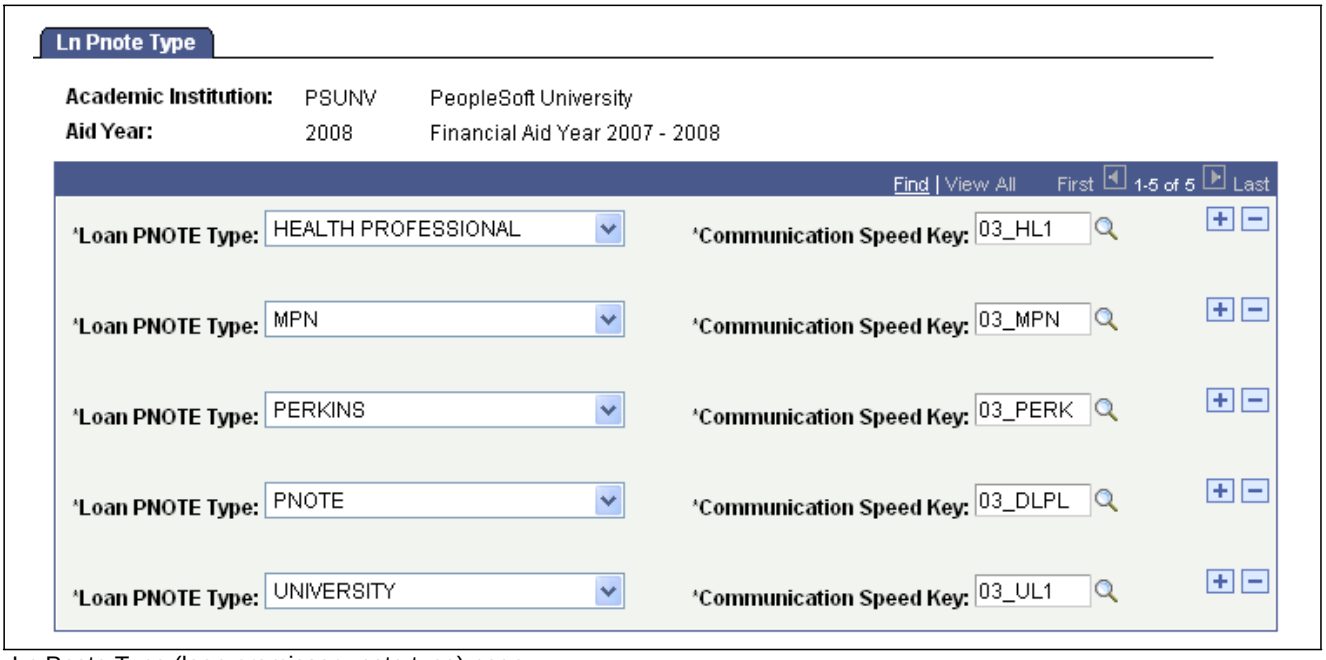
Leave this field blank if you do not use an external product.

Loan Type

Enter the loan types associated with the *Master PNote* or *Promissory Note.*

Setting Up DL Serial Promissory Note Table

Access the Ln Pnote Type page (Set Up SACR, Product Related, Financial Aid, Loans, Define Serial Promissory Notes, Ln Pnote Type).



Ln Pnote Type (loan promissory note type) page

Loan PNOTE Type (loan promissory note type)

Enter a type for *MPN*, the Stafford MPN document type. Associate Stafford Subsidized and Unsubsidized loan type values with *MPN.*

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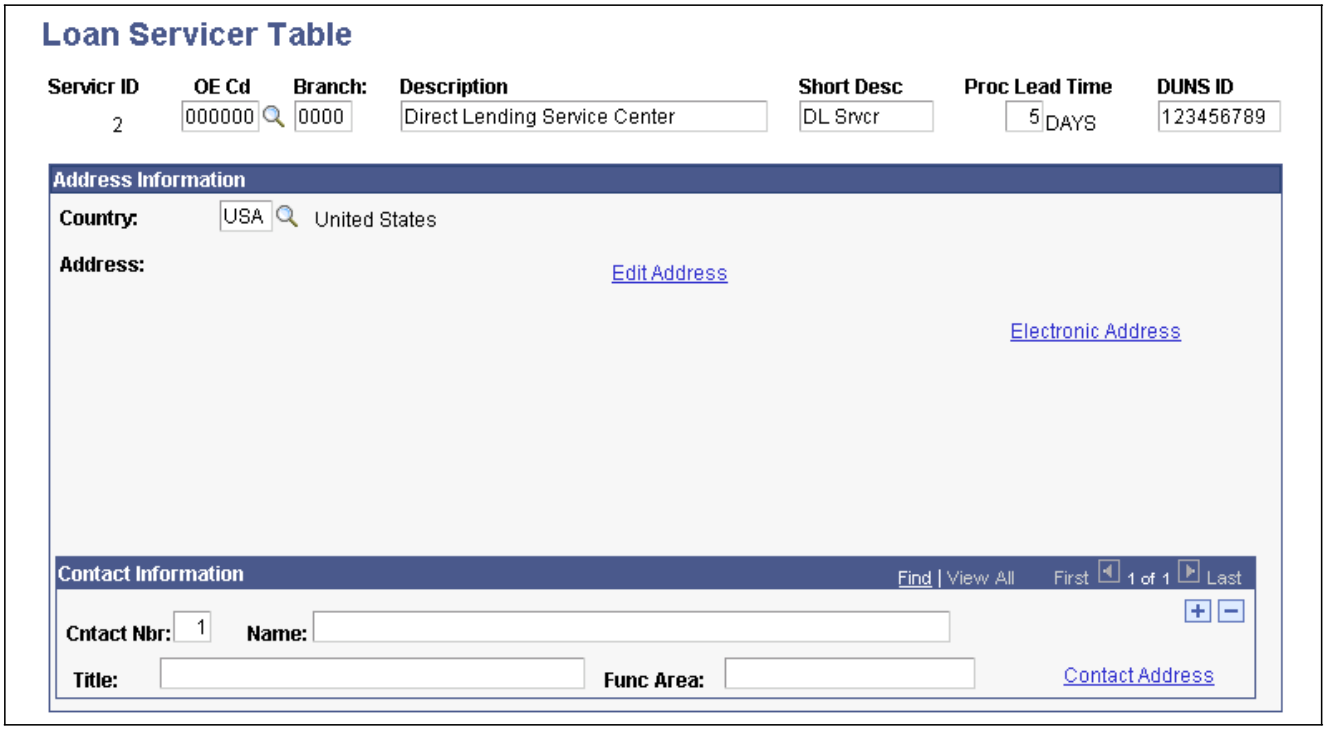
Insert a row to add *PNOTE*, the PLUS MPN document type. Associate PLUS and Graduate PLUS loan type values with *PNOTE*.

You might also need to add health, Perkins, and university/institutional loans to this setup page.

Communication Speed Key On each row, enter the Communication Key to be associated with the loan PNOTE type.

Setting Up Loan Servicer Table for Direct Lending

Access the Loan Servicer Table page (Set Up SACR, Product Related, Financial Aid, Loans, CommonLine4, Define School Servicers, Loan Servicer Table).



Loan Servicer Table page

Servicer ID This number identifies the servicer associated with the requested loan.

OE Cd (Office of Education code) When you select a value, the system uses data from the Servicer Load Maintenance database and automatically populates the rest of the information.

Proc Lead Time (process lead time) Indicates the number of days a loan destination needs to freeze its data to prepare for a transfer to the school. For example, if the lead-time is 5 days, changes can only be made to the student's loan 5 days prior to the first disbursement.

DUNS ID (data universal numbering scheme ID) The system displays this field if your institution is required to report a DUNS ID in the processing of loans. You can also enter your DUNS ID. The Department of Education assigns the DUNS number to the reporting institution.

Address Information

Enter the address of the loan servicer in the fields in this group box.

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Click the Electronic Address link to access the Servicer Electronic Address page, where you can enter an email address for this loan servicer.

Contact Information

Enter the name and title of individual contacts at the loan servicer. You can enter multiple contacts by inserting rows. The Cntact Nbr (contact number) field is used to prioritize the order of your contacts.

Click the Contact Address link to access the Servicer Contact Information page, where you can enter the address and email information for an individual contact at the loan servicer.

Entering Servicer Electronic Addresses

Access the Servicer Electronic Address page (click the Electronic Address link on the Loan Servicer Table page).

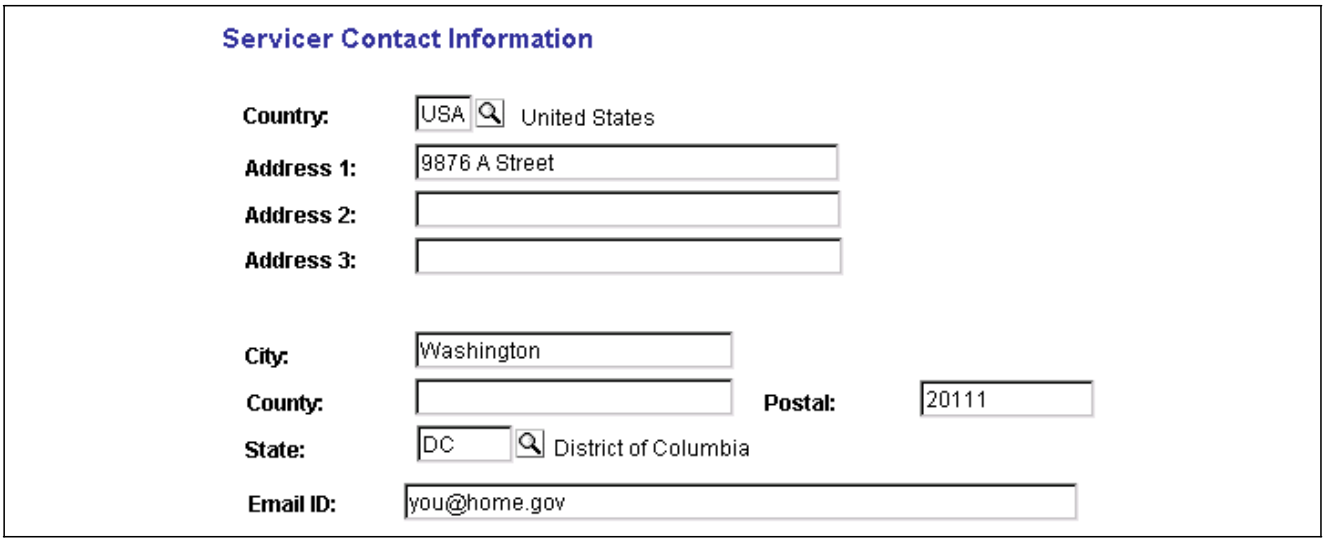
Servicer Electronic Address page

Mailbox Type Select the servicer's mailbox type of *None*, *Internet*, or *Compuserve*.

Mailbox ID Enter the servicer's mailbox identification or address to which data files are sent when the files are transmitted using the internet or a private communication network.

Entering Servicer Contact Information

Access the Servicer Contact Information page (click the Contact Address link on the Loan Servicer Table page).



Servicer Contact Information page

Enter the address and email information in the fields provided.

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Setting Up Loan Transfer IDs for Direct Lending

Access the Loan Transfer IDs page (Set Up SACR, Product Related, Financial Aid, Loans, Maintain Loan Transfer ID, Loan Transfer IDs).

Loan Transfer IDs page

Verify that the Loan Transfer IDs are set for the current aid year. Use the Loan Transfer ID Table page to set up loan transfer IDs and descriptions. This is a system definition table used for COD data file processing. EC Transaction ID correlates to Common Origination Message Classes used by Full Participants for sending and receiving data from the COD system for each processing year.

Oracle supports the following message classes for your Direct Lending process:

- DSDFnnOP School Account Statement Disbursements (Fixed Length).
- DSLFnnOP School Account Statement Loan Level (Fixed Length).

EC Transaction ID (electronic commerce transaction ID)	Select a value. When you tab to the next field, the system displays the Description and Short Desc (descriptions) for the EC Transaction ID. The EC Transaction ID is based on the Message Classes used for Direct Lending.
Loan Action Type	This field does not apply to direct lending.
In/Out	The system indicates whether the file is *Inbound* or *Outbound*.
Batch Yr (batch year)	Enter the last digit of the appropriate aid year. For example, enter *8* for 2008.
Batch ID	Indicates the unique ID for the batch. It is used when transferring data to the loan destination.
FA EDI Source Entity Cd (Financial Aid EDI source entity code)	Select the appropriate value for your institution. For most institutions, you select *FATP*.
FA EDI Source Business Unit	The system populates this field after an FA EDI Source Entity Cd is selected. The default value should be *FABU*. This allows the EDI Manager to retrieve and generate the appropriate file structure.

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FA EDI Destination Entity Cd (Financial Aid EDI destination entity code)

You must update your system annually. You should continue to review and update your setup pages for current year processing.

Note. You must update your system annually. You should continue to review and update your setup pages for current year processing.

Valid Loan Transfer IDs

This table lists Direct Lending Loan Transfer ID information current for this publication. Ensure that these transaction IDs are in your system if you plan to use direct lending.

EC Transactions ID	In/Out	File Type Data Definition	Batch Year	Batch ID	FA EDI Entity Source Code and EDI Destination Source Code	FA Entity Source Business Unit
DSDFnnOP	In	Import COD Statement of Account Summary file-Disbursement Level	Last digit of aid year. For example, Batch Year value of 9 represents 2008-2009 aid year.	AS	FATP	FABU
DSLFnnOP	In	Import COD Statement of Account Summary file-Loan Level	n	AS	FATP	FABU

Setting Up Loan Types for Direct Lending

You set up loan types, such as a direct lending subsidized type, to group processing information together and then associate certain item types to the loan type. This information is kept in the Loan Type Table, which is accessed from the Loan Type Table component. You can associate certain loan item types with the information you enter in the Loan Type Table.

Three of the four pages in this component are used for Direct Lending. The fourth page, the CommonLine NSLDS Xref page, is not shown here.

Entering the Loan Type

Access the Loan Type Table page (Set Up SACR, Product Related, Financial Aid, Loans, Create Loan Types, Loan Type Table).

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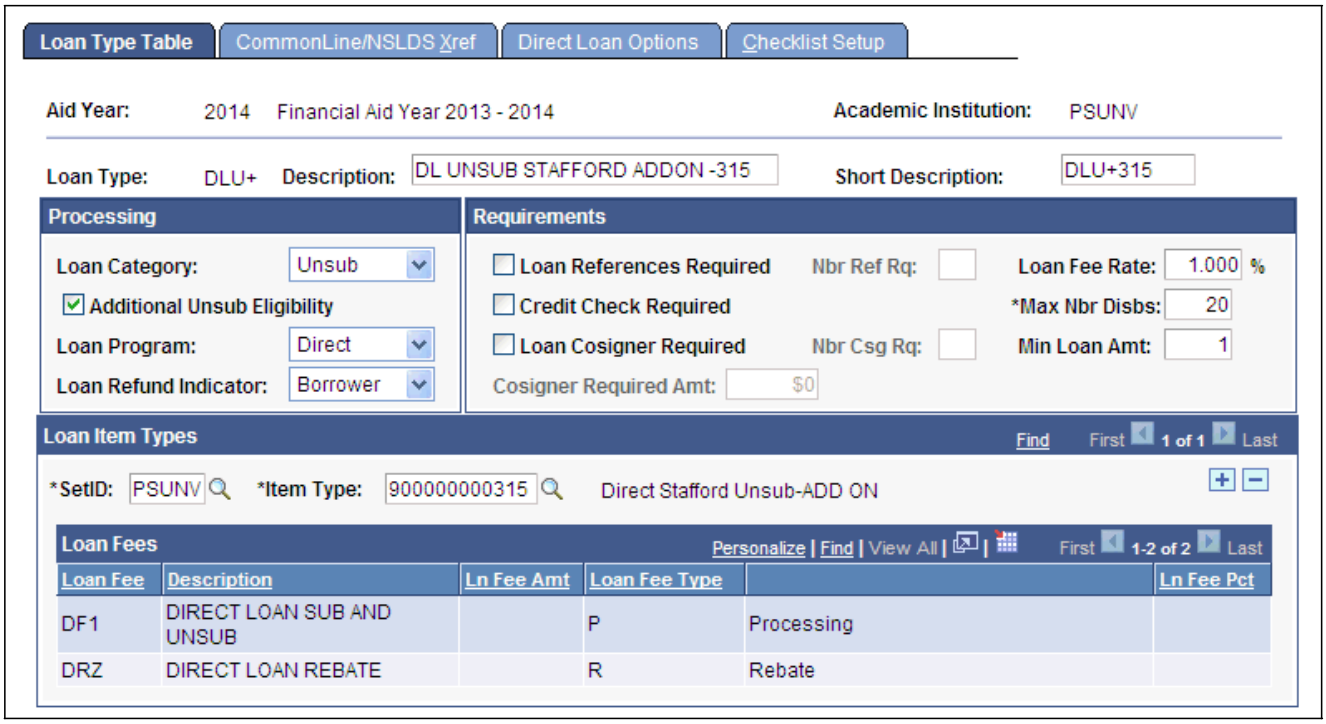

Loan Type Table page

The Loan Type setup allows you to provide further loan processing attributes to a Financial Aid Item Type defined as a loan.

Any Item Type defined as a loan must have a corresponding Loan Type if you want to use the Campus Solutions Loan Processing module.

Below are the specific attributes required to process your Direct Loan financial aid item types.

Processing

Loan Category

Select *Subsidized, Unsubsidized, or PLUS* depending on the type of loan that you are defining. Do not select any option except one of these for direct lending. If you select *PLUS*, a Graduate PLUS Indicator check box appears. Select the check box for Grad PLUS loans.

Additional Unsub Eligibility

Select if loan type is used to identify an additional unsubsidized Stafford loan Financial Aid Item Type awarded specifically for a dependent student with a PLUS Loan denied.

Note. Creating a unique Unsubsidized Stafford Direct Loan Financial Aid Item Type allows awarding and COD loan processing to specifically identify the loan awards as a loan based on PLUS Denied assessment. The loan detail gets communicated and reported to the NSLDS system, resulting in the loan displaying the Additional Unsubsidized Code (P-PLUS loan denial).

Loan Program

Select the *Direct* option for direct lending.

For example, to set up a Subsidized Stafford loan processed through direct lending, the Loan Category is *Subsidized* and the Loan Program is *Direct.*

Loan Refund Indicator

Select one of the following.

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Borrower: The borrower of the loan receives any refunds from the loan. For example, the borrower could be a parent or guardian for a PLUS loan.

Student: The student receives any refunds from the loan, whether they are the borrower or not.

You can override the loan refund indicator at the loan application level.

Requirements

Select the appropriate options for the loan by selecting the check boxes. Only those check boxes used for direct lending are explained.

Note. The Loan References Required, Nbr Ref Rq (number of references required), Loan Cosigner Required, Nbr Csg Rq (number of cosigners required), and Cosigner Required Amount fields are used for CommonLine loans only and are not relevant for direct lending.

Credit Check Required Select if a credit check is required for the type of loan. If selected, direct loan disbursements to the students and transmissions to COD do not occur until the credit check is accepted. Select this check box for PLUS loans.

Loan Fee Rate Enter the rate to print on the promissory note for this type of loan and transmitted on the loan origination record. Ensure that the loan fee rate matches the loan fee setup for the financial aid item type you associate with this loan type.

Max Nbr Disbs (maximum number of disbursements) Enter the maximum number of disbursements that are allowed per loan. The recommended values are *20* for Stafford loans and *4* for PLUS loans.

Min Loan Amt (minimum loan amount) Enter the minimum loan amount that your institution allows. The value should not be less than the COD minimum.

Loan Item Types

SetID The set ID that you select determines the item types that are available for you to select.

Item Type The selection available depends on the set ID that you entered. For direct lending you cannot have multiple financial aid item types associated with the same loan type. You must create a separate loan type for each direct lending item type to process. You cannot share financial aid item types across multiple loan types. If you try to use the same item type with a new or another loan type setup, you receive an error message.

The following field values are associated with the item type that you select.

Loan Fee Displays the type of loan fee associated with the item type selected. When you insert a row, you can use the inner scroll bar to view the new rebate loan fee percentage.

Ln Fee Amt (loan fee amount) Displays the dollar amount of the loan fee for the item type selected.

Loan Fee Type Displays the loan fee type associated with the financial aid item type. For direct lending you should have a row for rebate and a row for loan fees.

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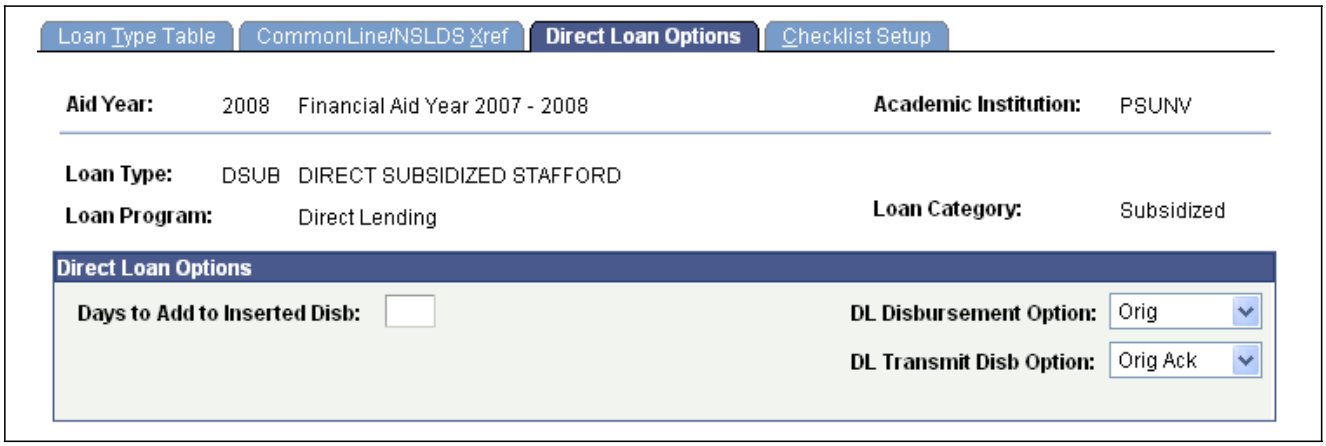
Ln Fee Pct (loan fee percentage)

Displays the loan fee percentage charged for the item type selected. These values are from your item type setup. The system also displays the interest rebate provided on the item type setup.

Note. DL-COD reporting reports the Direct Loan Interest Rebate Percentage based on the associated Loan Type setup.

Entering Direct Lending Loan Options

Access the Direct Loan Options page (Set Up SACR, Product Related, Financial Aid, Loans, Create Loan Types, Direct Loan Options)..



Direct Loan Options page

The system displays the Aid Year, Academic Institution, Loan Type, Loan Program, and Loan Ctgry (loan category).

Direct Loan Options

This group box allows you to specify the conditions for disbursing funds to the students and sending disbursement files to the direct lending Loan Origination Center.

Use Direct Loan Version

Displays the direct lending version you are using.

Days to Add to Inserted Disb (disbursement)

This is used for Stafford loans only. When entering an additional disbursement, the system adds the value specified in this field to the current date. This date becomes the anticipated disbursement date on the Origination Change Record for the added disbursement. Use this field to add days to the anticipated disbursement date so the money is actually disbursed later than the anticipated disbursement date.

For example, you can take a loan that is being processed today and use this field to add days to the anticipated disbursement date that is placed on the Loan Origination record. This makes the date reported to the COD later than the disbursement date. This field is not commonly used because generally institutions disburse sooner, not later.

DL Disbursement Option

Select when the system allows loans to be disbursed to the student's accounts.

Orig Ack: Disburses loans after you receive the Origination Acknowledgment.

Orig: Disburses loans after you originate the loan.

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Orig+PNote: Disburses loans after you receive the origination and promissory note acknowledgments.

PNote Ack: Disburses loans after you receive the promissory note acknowledgment.

DL Transmit Disb Optn (direct lending transmit disbursement option)

Select when the system should allow transmission of disbursement files to COD.

Orig Ack: Transmits direct lending disbursements after you receive the origination acknowledgment.

Orig+PNote: Transmits direct lending disbursements after you receive the origination acknowledgment and COD accepts the promissory note.

Note. If the Credit Check Required check box is selected on the Loan Type Table page, direct loan disbursements to students and transmissions to the COD do not occur until the credit check is accepted. Therefore, the values entered in the DL Disbursement Option and DL Transmit Disb Option fields are subject to the Credit Check Required check box value.

Warning! Changes to either of the DL Disbursement Option or DL Transmit Disb Option parameter settings do not affect loans already originated if the parameter settings are changed after the loans have been originated. Changes to these settings only affect loans originated at the time of the setting. If you have loans originated in error, please contact the Global Support Center.

Selecting DL Disbursement Option Values

Use this table to help determine when you can disburse loans to Student Financials, depending on the field value selected in the DL Disbursement Option field on the Direct Loan Options page.

Process Completed	DL Disbursement Option field on Direct Loan Options page	Authorize and Disburse?	If NO disbursement, what is step before I can disburse the Direct Loan?
Originate Loan	*Orig*	YES	If loan is DLPLUS (parent or graduate and professional) check to ensure record reflects an approved credit check. If loan is DL Stafford, check authorization error message for more information.
Originate Loan	*Orig Ack*	NO	Outbound the Originations file then wait for the Origination Acknowledgment file and import the file.

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Process Completed	DL Disbursement Option field on Direct Loan Options page	Authorize and Disburse?	If NO disbursement, what is step before I can disburse the Direct Loan?
Originate Loan	*Orig + PNote*	NO	Outbound the Originations file. Wait for the Origination Acknowledgment file and import the file. The loan application must be updated with an approved accepted promissory note. Promissory Note information maybe provided on an Origination Acknowledgement or Promissory Note Acknowledgement file.
Originate Loan	*PNote Ack*	NO	The loan application must be updated with an approved accepted promissory note. Promissory Note information maybe provided on an Origination Acknowledgement or Promissory Note Acknowledgement file.

Selecting DL Transmit Disb Option Values

Use this table to help determine when you can send the disbursement file to the COD, depending on the field value selected in the DL Transmit Disb Option field on the Direct Loan Options page.

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DL Transmit Disb Option field on Direct Loan Options page	OK to Process Disbursement Transmission Out?	If NO, what is next step before I can transmit the DL disbursement record?
Orig Ack	Yes, if Origination Acknowledgement has been imported and Loan Origination is accepted.	If Loan Origination Acknowledgement has *not* been imported, wait for the Loan Origination Acknowledgement file, load and import the file.
Orig + PNote	Yes, if Origination Acknowledgement has been imported and Loan Origination is accepted. The loan application must be updated with an approved promissory note. Promissory Note information maybe provided on an Origination Acknowledgement or Promissory Note Acknowledgement file.	If a Loan Origination Acknowledgement file has *not* been imported, wait for the Loan Origination Acknowledgement file, then load and import the file. The loan application must be updated with an approved promissory note. Promissory Note information maybe provided on an Origination Acknowledgement or Promissory Note Acknowledgement file.

Entering Checklists for the Loan Type

Access the Checklist Setup page (Set Up SACR, Product Related, Financial Aid, Loans, Create Loan Types, Checklist Setup).

Checklist Setup page

Checklist

Select a Checklist item to associate with the loan type. You define the checklist items available. The primary use of attaching a checklist requirement is to prevent disbursement of loan funds until the required documents on the checklist are completed. You can also use it to send reminders and for statistical reporting.

Some examples of possible checklist items are *Direct Loan Promissory Note, Direct PLUS Prom Note, FFELP Promissory Note, FFELP PLUS Promissory Note, Perkins Promissory Note, Health Professional Note,* and an *Institutional/University Note.*

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Bundle 32/Bundle 39

Added setup for 150 Percent Direct Subsidized Loan Limit (SULA) requirements. New section.

Setting Up 150 Percent Direct Subsidized Loan Limit (SULA)

NOTE: While the official name of this federal statutory requirement is "150 Percent Direct Subsidized Loan Limit", for ease of reference in the system, the acronym "SULA" is used. It is understood that COD defines SULA as "Subsidized Usage Limit Applies" (a flag indicating whether or not a person is subject to a subsidy limit for a Direct Subsidized Loan); however, “SULA” is being used for most things related to "150 Percent Direct Subsidized Loan Limit".

In order to monitor Direct Lending Subsidized loan limits, schools are required to report Program Classification of Instructional Program (CIP) code, Published Program Length, Program Period Start Date, Weeks Program Academic Year, Enrollment Status, Program Credential Level, and Special Programs Indicator (Non-Credential Teacher Certification Program or Preparatory Coursework) to COD.

This section discusses how to:

- Set up Credential Level Cross References
- Set up SULA Load Rules

Pages Used to Set Up 150 Percent Direct Subsidized Loan Limit (SULA)

Page Name	Definition Name	Navigation	Usage
Credential Level Cross Reference	SFA_COD_CRDLV_XREF	Set Up SACR, Product Related, Financial Aid, Loans, SULA, Credential Cross Reference	Map academic career/academic plan/National Student Clearinghouse (NSC) Classification combinations to COD Credential Levels.
SULA Load Rules	SFA_SULA_LD_TBL	Set Up SACR, Product Related, Financial Aid, Loans, SULA, SULA Load Rules	Set up COD Enrollment Status rules.

Setting Up Credential Level Cross References

Use the Credential Level Cross Reference page to map academic career/academic plan/National Student Clearinghouse (NSC) Classifications combinations to COD Credential Levels.

Access the Credential Level Cross Reference page (Set Up SACR, Product Related, Financial Aid, Loans, SULA, Credential Cross Reference).

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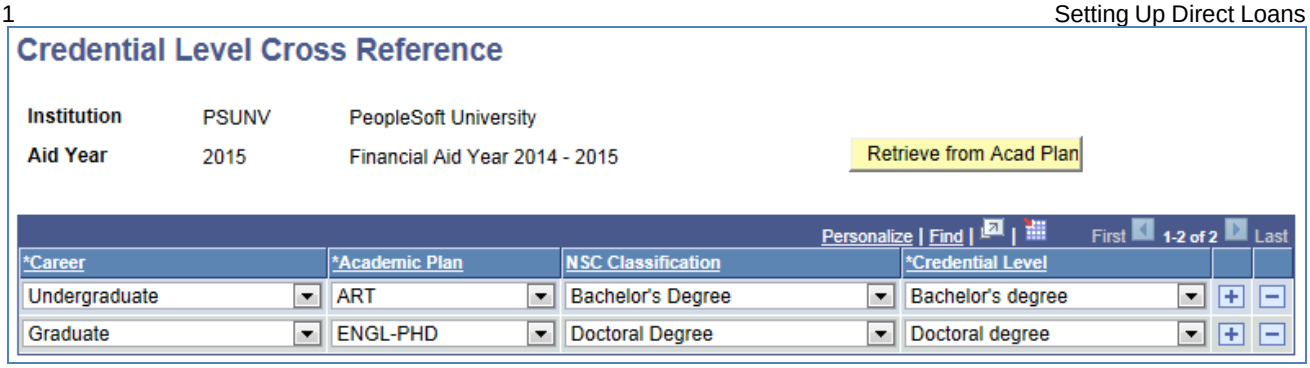

Credential Level Cross Reference page

Retrieve from Acad Plan

Click this button to automatically populate the Career, Academic Plan, and NSC Classification from the Academic Plan table instead of having to manually populate the table. Please note that even though you may click this button to auto-populate the table, you can still override the values here so that they can be different than what's contained on the Academic Plan table.

Note. If the NSC Classification field is blank on the Academic Plan table, it will populate this field as blank – you will need to populate this field in order to save this record.

NSC Classification

Select a NSC Classification value to associate with the Academic Career and Academic Plan. Valid values include**:**

- Associate's Degree
- Bachelor's Degree
- Certificate – Undergraduate
- Doctoral Degree
- Master's Degree
- Post baccalaureate certificate
- Post doctorate
- Professional
- Unspecified-Grad/Professional
- Unspecified-Undergraduate

Credential Level

Select a corresponding COD Credential Level to associate with the selected NSC Classification. Valid values include:

- Associate degree
- Bachelor's degree
- Doctoral degree
- First Professional degree
- Graduate/professional certif
- Master's degree
- Non-credential programs (preparatory coursework/teacher certification)
- Post Baccalaureate certificate
- Undergrad diploma/cert

Related Links

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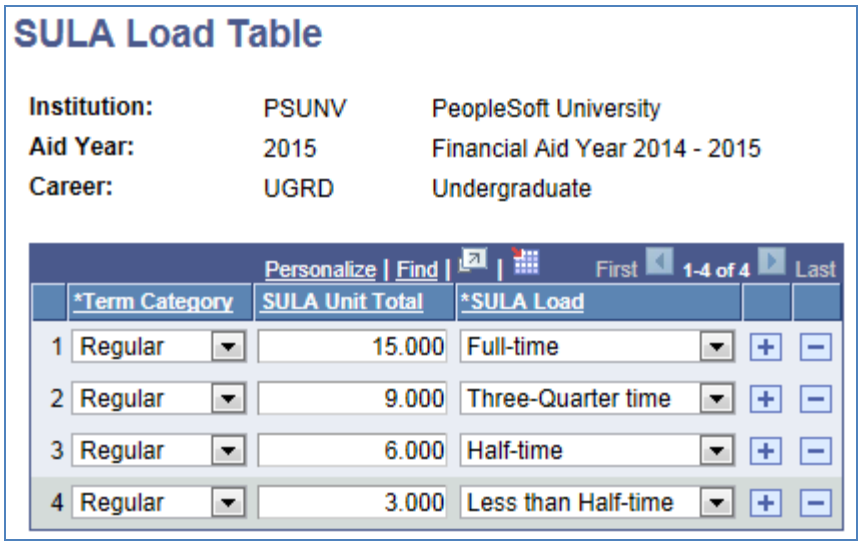
Campus Solutions Application Fundamentals PeopleBook > Defining Programs, Plans, and Subplans > Setting Up Taxonomy.

Setting Up SULA Load Rules

Use the SULA Load Rules page to define COD Enrollment Status (SULA) loads for reporting purposes to COD.

Access the SULA Load Table page (Set Up SACR, Product Related, Financial Aid, Loans, SULA, SULA Load Rules).



SULA Load Table page

This is setup determines the SULA Load value in the Financial Aid Term record and what is reported to COD.

Term Category Select the term category for the default term enrollment limits of the academic program.

SULA Unit Total Enter the SULA unit total threshold for each term category. The SULA unit total represents the summed number of Anticipated plus Current plus Remote units for the given SULA load.

SULA Load Select the SULA Load value. Values for this field are delivered with your system as translate values. Note: While you are permitted to establish a Less than Half-time value here, COD will reject Direct Lending loans that have an Enrollment Status that is Less than Half-time.

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Viewing System Administration Information

The following tables are view only and can be used by your System Administrator. The fields are defined by field layout and valid values required by the *COD Technical Reference.* This section discusses how to:

- View loan action codes.
- View Direct Lending change fields.

Pages Used to View System Administration Information

Page Name	Definition Name	Navigation	Usage
Loan Action Code	LOAN_ACTNCD_WK00	Set Up SACR, Product Related, Financial Aid, Loans, Maintain Loan Action Codes, Loan Action Code Table	View loan action codes and messages and their descriptions.
DL Change Fields	DL_CHG_XREF	Set Up SACR, Product Related, Financial Aid, Loans, View Direct Loan Change Fields, DL Change Fields	View loan action codes and descriptions related to Change Origination processing. This is a system definition table used for Direct Lending File processing. The Hold/Suspense options, for students and globally, come from this table.

Viewing Loan Action Codes

Use the Loan Action Code Table page to view loan action codes and messages and their descriptions. This is a system definition table used for file processing.

Access the Loan Action Code Table page (Set Up SACR, Product Related, Financial Aid, Loans, Maintain Loan Action Codes, Loan Action Code Table).

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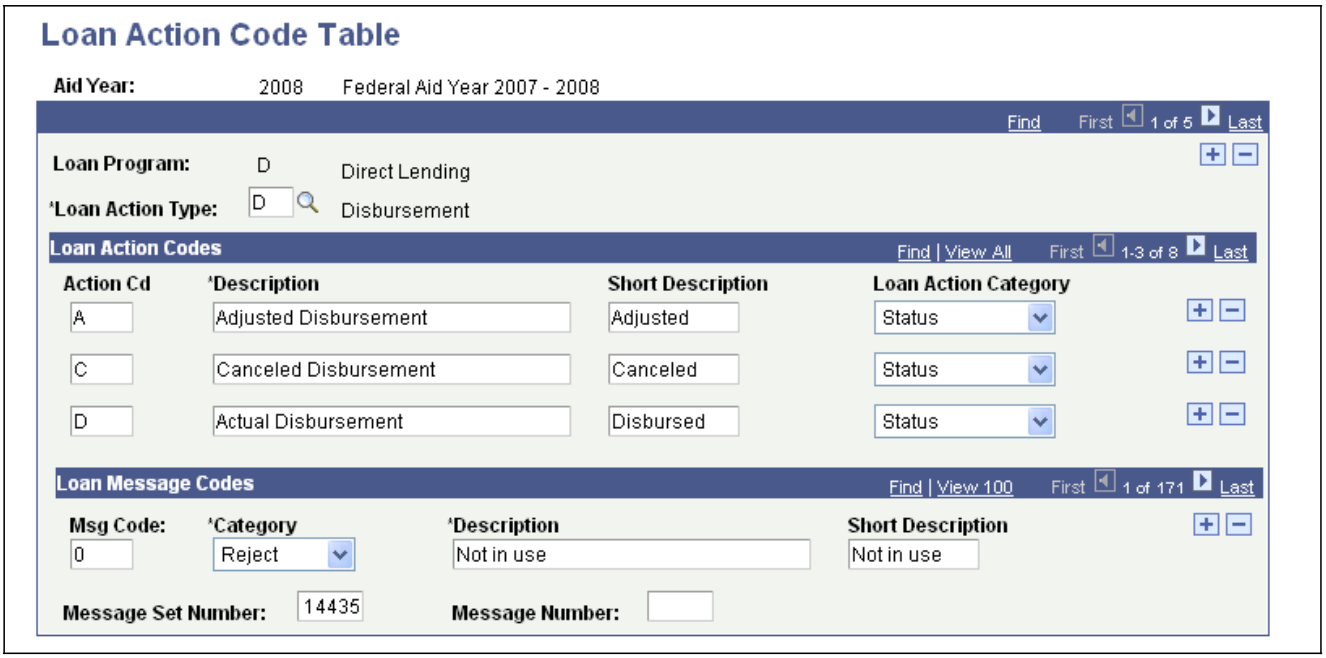
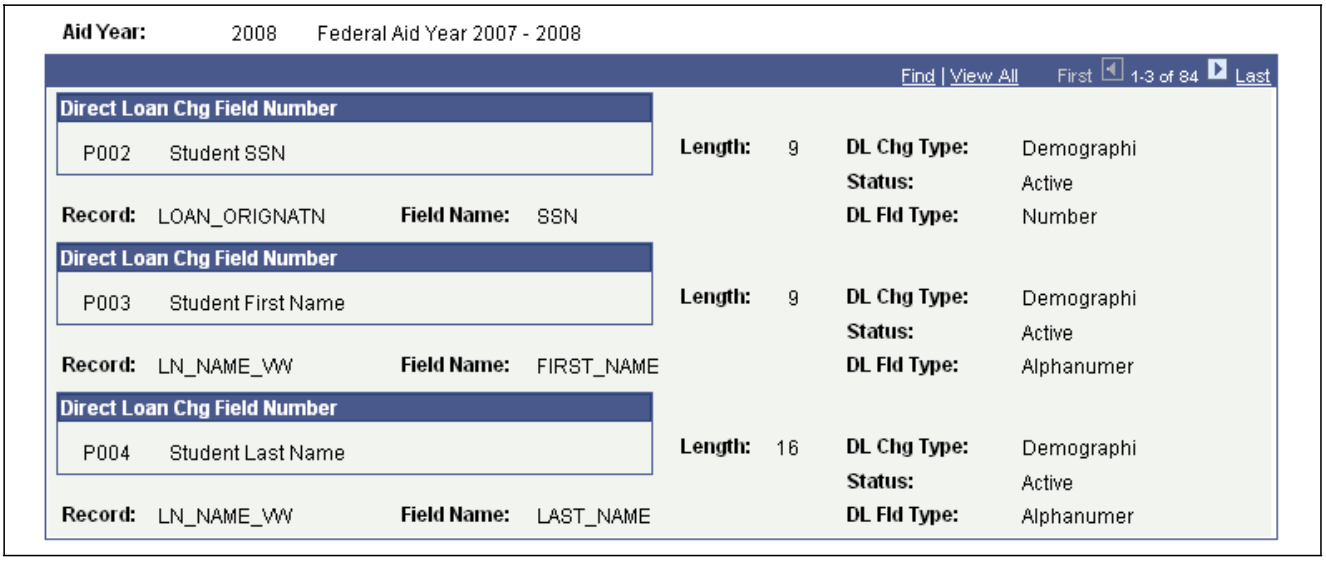


Loan Action Code Table page

Viewing Direct Lending Change Fields

Access the DL Change Field Cross Reference page (Set Up SACR, Product Related, Financial Aid, Loans, View Direct Loan Change Fields, DL Change Fields).



DL Change Fields page

Direct Loan Chg Field Number (direct loan change field number)	Displays field numbers defined by *COD Technical Reference.*
Length	Displays the number of characters allowed for the field.
DL Chg Type (direct lending change type)	Displays the type of change this field represents. Values are *Demographic*, *Financial*, and *Eligibility.*

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Status	Indicates the status of the field in your system.
DL Fld Type (direct lending field type)	The field type can be *Number* or *Alphanumeric*.
Record	The record/table name for this field in the system.
Field Name	Displays the name of the change field.

The change fields are used on two pages:

- Direct Loan Orig Actions (LN_DL_ORIG_INQ) page (Financial Aid, Loans, Direct Lending Management, View Loan Processing Actions, Direct Loan Orig Actions).
- DL Student Change Information (LN_DL_EMPL_PARM) page (Financial Aid, Loans, Direct Lending Management, Hold/Suspend Change Data).

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