

Student Information Systems



Using Commonline Module

Procedure Manual



South Dakota Colleague System Procedures

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Revisions with this Update

New Cover Page

New Preface

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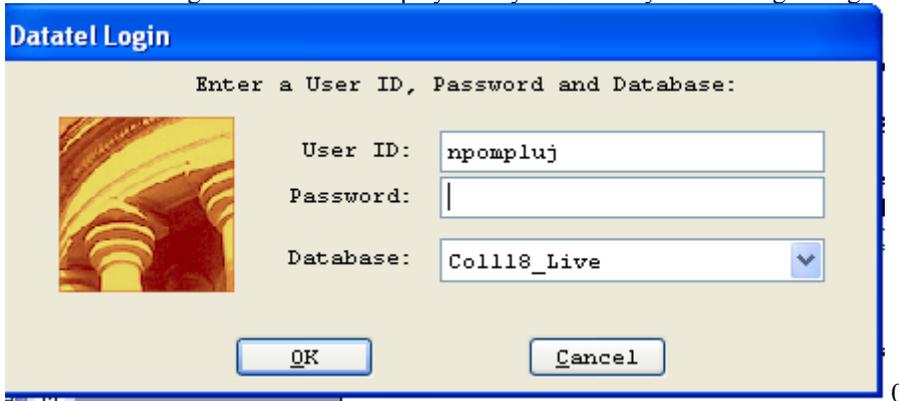
Preface

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Accessing Colleague from Windows

- Select the **START** button on the taskbar.
- Select **PROGRAMS** from the start menu.
- Select **DATATEL** from the **PROGRAMS** options.
- Select **UI Desktop** from the **DATATEL** options.
or
- Select the desktop **Datatel** icon.

A wIntegrate screen will display briefly followed by the Colleague Logon screen as shown below.



Logging On/Off & Changing Password

- Enter your Colleague ID in lower case letters at the login prompt and press enter.
- Enter the password at the password prompt. See the Rules for Password section of the document for changing passwords.

If either the login ID or login password is entered incorrectly, the login prompt will re-display. After 3 unsuccessful tries, the login ID will be locked and must be reset. Send an email to **your university system administrator**.

Select Coll18_Live for the Production Account or Coll18_Test for the Test Account.

Click on OK.

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Change Password

- Select the **START** button on the taskbar.
- Select **PROGRAMS** from the start menu.
- Select **DATATEL** from the **PROGRAMS** options.
- Select **DATATEL Terminal** from the **COMMUNICATIONS** options.
or
- Select the desktop **Datatel Terminal** icon.

The following screen will be displayed for the change of password.

<p>Main Menu</p> <ol style="list-style-type: none">1. Live Account2. Change Password3. Log Off <p>Enter your selection[1-10]: 2</p> <p>Changing password for "userid" userid's Old password: userid's New password: Enter the new password again:</p>

- Enter userid's old password
- Enter userid's new password
- Re-enter userid's new password

A message will display confirming that the password has been changed.

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Rules for passwords are:

- a) The password must be a minimum of six characters long.
- b) The password must contain two characters and two numbers.
- c) The password must have two alpha/numeric characters not in the previous password.
- d) The password can not have more than two repeating characters.
- e) The password only recognizes the first eight characters, but a password can contain 256 characters.
- f) Passwords can not contain these characters: () * ? < > / ; & ! [] { } | \$ \ ' ")
- g) The password is case sensitive.

Password Change Requirements

- a) Users will be required to change password every 20 weeks. After the 18th week, users will be notified that their password will need to be changed soon. They will then have those two weeks plus an additional two weeks grace period to make that change. Total time lapse for a password is 20 weeks.
- b) The account will be locked if no change is made to a password after the grace period. To reset the account, send an email to **your university system administrator**.
- c) When a user is requested to change password upon login to Colleague, they **MUST** do so. Failure to comply will result in being locked out of the system after the fifth try. However, while trying to change password, the user is given several tries to meet the password criteria until they are successful. If the user gets locked out, send an email to **your university system administrator** to have the ID reset.
- d) When a user receives the message to change their password, they will have 60 seconds to begin typing before they are disconnected – but not locked out.
- e) Passwords cannot be reused immediately. There is a 26-week wait period before a password can be recycled. Even then, the password cannot have been used within the last two iterations.

If you are successful logging in, you will get the message screen with the “PRESS ENTER TO CONTINUE” message at the bottom. A small ‘loading’ message will flash on the screen before you get the ‘Datatel – Colleague’ screen.

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Options on the very top row:



To start a new session, click on **File**, then **New Session**, then **Current Account** to stay in the same account (Live or Test) or **New Account** to open a session in the opposite account.

To change the application, click on **Apps**, check the application wanted: ST is the student application and most users will not need to use another application.

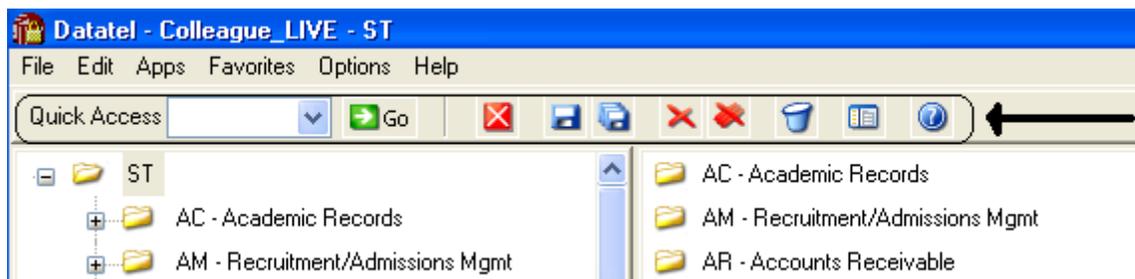
If you use a few screens often and want them on a separate list, click on **Favorites**, then **Add to Favorites**, then type in the mnemonic of the screen and click OK.

To change the font or colors on your screens/reports, click on **Options**, then **Font** or **Change Colors**.

To be able to scroll back to see output on the screen from paragraphs run from a user menu (to see list of menus, click on NCCR, then XNSU), click on **Options**, then **Show UI Console**. A Datatel UI Console window will appear on the screen. Enter the menu name on the Datatel-Colleague main screen. Answers to the prompts can be entered on Datatel – Colleague main screen or in the Send to Host box at the bottom of the Show UI Console window. To view output on the screen, use the scroll up or down buttons at the right on the Show UI Console window.

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Options on the Second Row:



If you know the name of the screen you want to access, type in the mnemonic in the **Quick Access** box and click **Go**. The drop down box in the Quick Access box will contain the mnemonics you have used previously.

If you are updating records and have not detailed to another screen, click on the **Single Disk** (or pressing F10) to update the current screen and retain the same screen to select a new record. If you have detailed to another screen, click on the **Single Disk** (press F10) to update the current screen and return to the screen from which you detailed. If you have detailed down to additional screens and wish to update all the fields that you have changed on all the screens and return to the menu, click on the **Multiple Disks**.

If you have looked at a screen without detailing down and do not want to make any updates but want to look at other records on the same screen, click on the **Red Diagonal with a Single Cross Diagonal** (or pressing F8). If you have detailed down and you do not wish to update the fields on the current screen (and any screens you detailed from to get to the current screen) and return to the menu, click on the **Red Diagonal with a Multiple Cross Diagonals**. **Warning:** If you click the Red multiple Cross Diagonals, none of the changes you made on any screen you detailed from will be saved.

Wastebasket (Shift-F10) is for deleting entire records. Clicking on the **Menu** when on a screen turns on (off) the menu display on left side of screen. To see the Field Help for the field where the cursor is, click the **Blue Circle with a ?** (F1) inside.

Menu



To expand the menu on the left side of the screen to see submenu(s), click on the Plus sign (+). To remove submenus, click the Minus sign (-).

To access a screen without typing the mnemonic, click on a screen name that does not have a plus (+) or a minus (-) in front.

To see a list of screens that you have added to **Favorites** (see above), expand the Favorites Menu by clicking on the Plus sign in front of Favorites. This will enable you to display a customized menu of screen names.

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Detail Screens

Screen mnemonics display at the top of left hand corner. To move to a new field, use the mouse to point and click on the new field.

Multiple value fields will have a box with a number at the left of the data.

A box with bright colors to the right of the data indicate that you can drill down to a detail screen by clicking on the box or by pressing F2. Do not drill down from a Comment screen. If, however, you drill down from a Comment screen, you will be taken to an editor. To return to the Comment screen, enter 'fi' at the bottom.

The names of the screens that you have drilled through will display at the top. You can look at one of those screens by clicking on it; however, you will not be able to update it unless you cancel (clicking on the single red X box in the 2nd top row or pressing F2) or finish out (clicking on single black X box in the 2nd top row or pressing F9) of the screens that you detailed to.

Fields with a box at the right with a 'V' have Validation Codes associated with the field. To see a list of valid codes, click on the box. To select a value, click on the item in the list.

If you enter 3 dots (...) in a field that has table values associated, the table will be displayed. To select a value, type in the number associated with the list and press enter OR check the box (or boxes to populate multiple values in a multiple valued field) to the left of the number and click on the disk at the bottom of the screen.

Fields with 2 small rectangles with an up arrow in the top rectangle and a down arrow in the bottom rectangle allow you to scroll through the fields by clicking on the up or down arrow. Right click on the up or down arrow for a drop down box allowing you to select from a list of options.

Fields with a box with a calendar are date fields. You can select a date from a calendar by clicking of the box and clicking on a day on the calendar. When the calendar is displayed, you can change the month by clicking the single 'less than (<)' or 'greater than (>)' symbol; to change the year, click the double less than (<<) or greater than (>>) symbols.

To copy the value in a field highlight the field, press Ctrl C; to paste that value in another field, highlight the new field and press Ctrl V. Alternatively, highlight value to copy, click Edit, click Copy, highlight the new field, click Edit, click Paste.

Date and Time Stamp

Put the cursor is in the Comment field, click on Edit, then click on Date/Time/Login Stamp

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To view a report

Output from processes (ie EVAL) or reports on UTFB will be displayed in a report browser. To scroll through the current page, use the scroll bar at the right side. To go to a new page, press the Left or Right Arrow (Page Down, Page UP). The rightmost Printer is used to print to a printer that has been defined to Colleague.

Function keys

F1 → Field Help provides on-line short help specific to the field in which the cursor is positioned.

F1 Enter → Field Help provides a longer on-line, detailed help messages specific to the field in which the cursor is positioned

Shift F1 → Process HELP gives an overview of a process, explaining its basic function and its relation to other processes

F2 → DETAIL moves to different screens and is used when there is box to the right of the screen indicating that drill down screen(s) are available.

Shift F2 → Funct HELP (Fkey HELP) displays the layout of function key assignments for keyboard.

Shift F8 → Direct Acc cancels the updates made on the screen and returns to the previous screen

F9 → FINISH saves new data entered and takes you back to the previous screen or menu

Shift F9 →FINISH same as F9

QUICK TIPS

- ✧ To display the last person, term, section, etc.. displayed use @ on the command line.
- ✧ To display a list of table values when the cursor is on the command line type "...".
- ✧ Always Cancel from a screen you are not updating. Caution: Changes made on a drill down screen will not be saved when you cancel from the current screen.

Search Procedures

Student searches may be completed in several ways:

- Student Social Security Number
- Student Colleague ID
- Exact Student Name
- Student Name by Sound

Student Social Security Number Search

- ◆ To begin a record search, first use the social security number if available. Check the name and birth date to confirm a match of the record for which you are searching.

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Student Colleague ID Search

- ◆ Colleague ID, a 7 digit unique ID assigned by Colleague, can also be used for a person search. Again, check the name and birth date to confirm a match of the record for which you are searching

Name Search

Name searches will display a resolution screen listing all people meeting the name search criteria. Select the desired record by using the sequence number.

Exact Name Search

A name search can be done in three ways: “First Name” (space) “Last Name”; “Last Name”, “First Name”; or “Last Name” only. It is also permissible to use only part of the first or last name for a broader name search. ** You must use a minimum of three characters when doing a partial name search.

When searching for a name with spaces, use the underscore key “_” to identify the position(s) in the name where the spaces are located. Example: Terrance Van Den Hemmel would be searched for by entering “Terrence Van_Den_Hemmel” or “Van_Den_Hemmel, Terrance”.

When searching for a name with an apostrophe or a hyphen, leave the apostrophe or the hyphen in the name search. Example: Bruce O’Neil would be searched for by entering “Bruce O’Neil” or “O’Neil, Bruce”, Marge Wilson-Hart would be searched for by entering “Marge Wilson-Hart” or “Wilson-Hart, Marge”. The name search will also find Marge by using either part of her hyphenated last name. Example: “Wilson, Marge” or “Hart, Marge”.

Phonetic Name Search

If social security number search and name search (full and partial) fail to yield a result, use the soundex option. This option will search for a last name by “the way it sounds”. At the lookup prompt, type in “/” before typing in the phonetic spelling of the last name. This does a broad search by the sound of the last name, but it is not as reliable as the other search options.

The name search will search records based on the “Name LFM” and “Other LFM” fields. The name search will not search records based on the “Pref Name” or “Mail Name” fields. All possible record matches are displayed on the “person resolution” screen by preferred name.

When a list of possible records is found on the “person resolution” screen, check the social security number, birth date, entry date, and address to confirm a match of the record for which you are searching.

Other Searches

Course or Section Search

Enter XXXX-000-00

Where: XXXX is the prefix for the course (i.e.: BIOL)

000 is the course number (i.e: 101)

00 is the section number with the university identifier(i.e.:x 01)

Example: BIOL-101-D01

If the section number is not provided, a resolution screen will be displayed for the selection of the correct section.

Term Search

Enter YYYYTT (i.e.: 1998FA)

Where: YYYY is the year in which the term actually occurs (i.e.: 1998)

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TT is the term
(i.e. FA = Fall , SP = Spring, SU = Summer)

Restricted lookup by Topic Code

- At the resolution screen, enter S to select sections by Topic Code (or another value on the section)
- At the SSELECT COURSE.SECTIONS BY @ID: prompt, enter the selection criteria
 - For example, WITH SEC.TOPIC.CODE EQ 'USDSU' will bring back the sections only offered at SDPURC

Restricted lookup for open sections

Search for open sections by entering S at the section resolution screen from RGN, then type WITH SEC.AVAIL.STATUS EQ 'Open' and return.

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Record Search Overview

Responsibility: University

LookUp Selection Options

The LookUp Processor gives you full query-language selection capabilities along with full data field and record security. Many of the selection options available with LookUp are similar to using database management query language and retrieval. See your system administrator if you need assistance using any of these options.

You may enter one of the following at the LookUp prompt:

- * the actual ID
- * [**@**] to display the last record filed
- * [**...**] to view all IDs you may access
- * [**ABC...**] to select all IDs that begin with ABC
- * [**...ABC**] to select all IDs that end with ABC
- * [**...ABC...**] to select all IDs that contain the characters ABC
- * [**ABC...XYZ**] to select all IDs that begin with ABC and end with XYZ
- * [**;**] to display all available dictionary elements for this file
- * [**;**dictname to 1) Select all IDs with a value for this dictionary element or 2) If dictname is an indexed field, to display a resolution screen showing all the values indexed for this dictname. For example, you might enter ";SCHOOLS.DEPTS" at the Schools LookUp prompt to find all the schools in your institution associated with one or more departments.
- * [**;**dictname datavalue to select all IDs with a value like the datavalue for this dictionary element. For example, you might enter ";SCHOOLS.DEPTS MATH" at the Schools LookUp prompt to find all the schools in your institution associated with the math department.
- * [**;**dictname operand datavalue to select all IDs whose value of dictname matches the operand and datavalue(s). A datavalue may be any string containing alphanumeric characters or ellipsis (...). For example, you might enter ";SCHOOLS.DEPTS NE MATH" at the Schools LookUp prompt to find all the schools in your institution not associated with the math department.

Valid operands are:

- * [=] or [EQ] (Equal)
- * [<>] or [NE] (NOT Equal)
- * [>] or [GT] (Greater Than)
- * [>=] or [GE] (Greater or Equal)
- * [<] or [LT] (Less Than)
- * [<=] or [LE] (Less or Equal)
- * [MATCHES]
- * [LIKE]
- * [UNLIKE]

Record Lookup

There are various types of records created in Colleague. Person or Organization records, records for courses and course sections, academic credentials, positions, benefits, general ledger accounts, and purchase orders are just a few of the types of records created throughout Colleague. Generally speaking, once these records are created, information pertaining to them can be changed or deleted but the actual person or organization record will always remain. For example if you create a course record for ENGL-1234, once saved, you can change the credits, academic level, title, CIP codes, etc., but you can't change the name to ENGL-2345. Similarly, if you create a person record for Bob Smith and save the record you can later change his address, phone number, birth date or even his

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social security number but you can't delete Bob Smith's record. The following are steps, or procedures, for searching records:

Person/Organization Lookup

The person/organization record is the more difficult record to find since you are relying on two variables. First is that the person providing the information was honest in presenting the demographic facts and secondly that the data entry person was accurate in entering in data. On occasion, you will find that people provide incorrect information or even falsify data. This is commonly seen when people can't quite remember their social security number so they provide one that is close. Secondly, data entry staff are only human so honest mistakes do occur when they try to read scribbled handwriting on a form. Regardless of how inaccurate data got into the system, front-end staff must carefully check for those eventualities before adding new records.

The following step-by-step process is for looking up records as well as an explanation of the reason for the process:

1. **Enter first two letters of first name and first three letters of the last name** - (You can also enter Smi, J and Colleague uses the comma to designate last, first). Although this option will bring more records than spelling the entire name out, it helps locate records with incorrect or slightly different spellings. If you chose to enter the entire name you would certainly get a smaller group of records to look through but you also have a greater chance of missing duplicates.

IF YOU HAVE NO MATCH:

2. **Enter the Social Security Number** - Although you may not see the need to use this option after a name lookup does not pull a match, some students may have been using the wrong number or you may find a conflict with the number. Since the social security number is a unique identifier, we want to ensure that we have the correct number associated with that person.

IF YOU HAVE A NAME WITH UNUSUAL SPELLINGS:

3. **Try a Soundex lookup**- in some situations you may encounter names that have several common spellings or that you have difficulty in determining proper spelling. By using a Soundex lookup you will find occurrences that don't match the spelling but sound like the name you are searching for. To look a name up using Soundex, at the Person Look Up type: /erdlika, ray (actual name searching for is: Hrdlicka, Raymond).

Use the data elements on the resolution screen to verify that the right person is selected. Also check to see if two records look similar. Remember that the system will allow entry of the same person twice (except for the social security number). If the birth date and the address are the same, it may indicate that there is a duplicate. If the record is truly a duplicate, follow the procedure in the final section of this document to consolidate the record into one.

** POINTS TO REMEMBER **

- 1) If the person whose name is being entered goes by another name or a nickname, that person's name may not be found unless the other name has been entered on NAE as an "Other Name" or a nickname has been entered on the BIO (Biographic Information) screen. It is really a judgment call when entering a person's name and deciding whether or not that name is the person's legal or other name. However, the Human Resources/Payroll office will have the legal names of employees.

EXAMPLE: The end-user has an application to enter and they are using the APPN screen. The name on the application is Jimmy Stern. James Stern was entered previously as a prospect on the XPRS screen. The end-user enters Jimmy Stern at the

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Person Lookup and the record is not found. They also do a partial name lookup of Ji St and the record is not found. Using the first initial of “J” would have found the name James Stern.

EXAMPLE: Buck Stern was entered on the XPRS screen as that is the name he had put on a Prospect card from a High School Fair. His application is now in the Admissions office with James R. Stern entered on the application. James R. Stern would not be found in a Person Lookup as Buck Stern had been entered as a prospect. An alternate lookup would be to type the last name “Stern” only.

2) The “Preferred Name” field is a default from the entry in the “Last”, “First”, “Middle” field at the top of the NAE screen. If one name only is entered in the “Preferred Name” field then LookUp for that person would be the first name only. For example: Rachel Briggs goes by “Sammy” Briggs. Sammy only is entered in the “Preferred Name” field. A data entry person goes to look up Sammy Briggs and that name is not found.

RECOMMENDATION: Leave the “Preferred Name” as it appears after entry in the Last, First, Middle fields and enter the other name in the “Nickname” field on the Biographic Information (BIO) screen. *This screen can be accessed by detailing on the Last, First, Middle name field on NAE.*

Other Records Lookup

Since there are fewer opportunities for spelling errors and the format for naming is usually very structured, other record lookups tend to be more straightforward. However just as with person records, it is important to follow consistent steps when searching before adding records. Following is a step-by-step process for looking up records:

1. **Enter a partial lookup** - Once again this option will bring back additional records that will require you to look through more resolution items but it helps ensure that the record you wish to enter doesn't exist in a similar form. On some lookup screens you may be required to enter complete pieces such as with courses (on CRSE you need to enter the full subject name ie., ENGL).
2. **Use (...) as a wild card lookup** – Looking for a group of records that fit a specific criteria can be done by using ... For example, looking up a GL number with the numbers “1150” in the middle you can type ...1150... at the lookup prompt. Only those numbers with 1150 will appear on the resolution screen. This applies as well by typing ... at the beginning or at the end of the lookup. For example, in searching for positions that end in ADJ you would type ...ADJ or searching for all departments that begin like EN you would type EN...

Individual and Corporation Record Relationship

CAUTION

In Colleague, the system maintains a **unique distinction for individuals and corporations**. When you enter a person on NAE, APPN, FCTY or FACL, the system creates a record in the PERSON file. Likewise, when an organization is created on ORGP, a record is created in the CORP.FOUNDS file. The concern arises when lookups are done on a screen earmarked for the other (calling up University of Sioux Falls on NAE or Mary Smith on ORGP). Colleague gives you a message similar to the one below. If you save out the screen, the record will be moved to the other ‘domain’. In other words, an organization record could be converted to a PERSON record or a PERSON record could be converted to a CORP.FOUNDS record.

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If you have update access to the screen and receive a 'Warning! This record will be marked as a person if updated' message, you must:

- Click OK to release the warning message.
- Cancel out of the screen without making any changes by clicking on the single or triple X, clicking on File and Cancel or using Shift -> F8 and hit Enter.
- If you want to access the record, go to ORGP (corporations) or NAE (individuals).

If you accidentally make the change you can return the record to the correct domain by calling up the record on the appropriate screen.

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Flagging records on a resolution screen

For ease in data entry, Colleague allows you to flag either all records on a resolution screen or certain records on a resolution screen. To flag certain records, enter F on the resolution screen, then enter the number of the item you wish to flag. To flag all records, enter F ALL on the resolution screen. Notice all records have an asterisk next to them. You can do a sort/select option before the F ALL to narrow the resolution screen down.

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Using a savedlist to process large numbers of records

- At the person lookup prompt, enter @SELECT
- The Primary Selection Criteria (PSC) screen is displayed
 - Enter the savelist list name
- Update to process the records
 - Enter @@ or \$ at the LookUp prompt to retrieve/view the first selected record, etc
- To deactivate your list, enter @SELECT at the LookUp prompt
 - Save or clear the list

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Setting Up Colleague for Electronic Loan Processing

Responsibility:

Timeframe:

Setting up Colleague for CommonLine processing requires the following high-level steps:

1. Use the Loan Institutional Defaults (LIDF) form to do the following:
 - Select a rule table for assigning processing types to applications.
 - Define application defaults for your institution.
 - Select an address hierarchy for permanent local, and temporary addresses.
 - Establish loan period date tolerances for linking CommonLine Response File data to Colleague applications. See “Setting Up Institutional Defaults for Loan Processing”.
2. If you are a multi-location institution, use the Loan Office Defaults (LODF) form to define application defaults for each Financial Aid office. See “Setting Up Office Defaults for Loan Processing”.
3. Use the Loan Application Defaults (LADF) form to define application defaults for all applications for a student for any academic year. See “Setting Up Student Defaults for Loan Processing”.
4. Use the Award Definition (AWD) and Loan Award Definition (LAWD) forms to define awards codes that will generate an application when entered on the Award Detail Entry (AIDE) form. See “Setting Up Awards and Transmittal Parameters”.
5. Use the FA Awarding Parameters (FAAP) form to set up transmittal parameters for electronic loans. See “Setting Up Transmittal Parameters for Electronic Loan Processing”.
6. Use the Award Disb Code Maintenance (ADCM) form to define award disbursement codes for application processing. See “Award Disbursement Code Maintenance”
7. Use the Lending Inst Definition (LID) form to define lending institutions for application processing. See “Lending Institutions”.
8. Use the Loan Guarantor (GUAR) form to define guarantor agencies for application processing. See “Guarantor Agencies”
9. Use the Recipient Agency (RECP) form to define recipient agencies for application processing. See “Recipient Agencies”
10. Use the Loan Processing Type Rule (LTRL) form to define a processing type rule table or subroutine for assigning processing types to applications. See “Understanding the Processing Type Rule Table”
11. Use the Hold/Release Rule (HRRL) form to build rules to determine which status you would like a disbursement to be (Hold or Release). See “Understanding the Hold/Release Rule Table”
12. Use the Send Receive Parameters (ELSR) form to define default parameters for electronic transmission and retrieval of application and loan data. See “Transmission and Retrieval Parameters”
13. Use the Electronic Loan Compare Param (ELCP) form to define comparison parameters for use with the Electronic Loan Appl Variance (ELAV) report. See “Report Comparison Parameters”
14. Use the Electronic Import Override (ELCO) form to identify whether certain Colleague application fields will be overwritten during the Import Electronic Loan Files (IELF) process. See “Import Override Parameters”
15. Use the App Send Required Fields (ELRQ) form to review and modify the fields that are required for export. See “Application Send Required Fields Parameters”
16. Set up wIntegrate for file transfer. wIntegrate setup is required only if one of the following is true:
 - You are *not* using the partial or custom transmit method during the Loan Appl Export (LAPX) process and intend to manually transfer the export files to a PC. For information about transmit methods, see “Transmit Parameters”

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OR

- You are *not* using the partial retrieve method during the Import Electronic Loan Files (IELF) process and intend to manually transfer the CommonLine files from a PC to the Colleague host. For information about retrieve methods, see “Retrieve Parameters” See “Setting Up wIntegrate for File Transfer”

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Setting Up Institutional Defaults for Loan Processing

Responsibility:

Timeframe:

Complete the following steps to define your institutional defaults for loan processing.

Step 1 - Access the Loan Institutional Defaults (LIDF) form.

Step 2 - In the Processing Type Rule Table field, use Rule Table Lookup to select a rule table for assigning a process type to loan applications as they are created. Processing type rule tables are defined on the Loan Processing Type Rule (LTRL) form.

Step 3 - In the Deferment Request Code field, enter the default deferment request code for your institution.

Step 4 - In the Capitalization field, enter the default capitalization code for your institution.

Step 5 - In the EFT Authorization field, enter the default EFT authorization code for your institution.

Step 6 - In the Lender ID field, use Lenders ID LookUp to select a default lender for your institution.

Step 7 - In the Guarantor ID field, use Guarantor ID LookUp to select a default guarantor for your institution.

Note: If you have already entered a guarantor ID, Colleague will limit the list of valid lender IDs to lenders who have been associated with the guarantor on the Lending Inst Definition (LID) form or the Loan Guarantor (GUAR) form.

Note: If you have already entered a lender ID, Colleague will limit the list of guarantor IDs to guarantors who have been associated with the lender on the Lending Inst Definition (LID) form or the Loan Guarantor (GUAR) form.

Step 8 - In the Recipient ID field, use Recipient ID LookUp to select a default application recipient for your institution. Recipients are maintained on the Recipient Agency (RECP) form.

Step 9 - To have Colleague attempt to combine related subsidized Stafford and unsubsidized Stafford loan on the same application, select the Combine Sub/ Unsub field.

Step 10 - In the Fed Appl Form Code field, enter the value that defines the application and prom note.

Step 11 - In the Serial Loan Code field, enter a valid serial loan code.

Step 12 - In the Prom Note Deliv Code field, enter a code that describes the best method for delivering the promissory note.

Step 13 - In the Hold/Release Default field, enter a default Hold/Release Status for your institution.

Step 14 - In the School ID field, enter the Office of Postsecondary Education (OPE) identification number assigned by the Department of Education (ED) to your institution.

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Step 15 - In the Non-Ed Branch ID field, enter the branch or campus ID assigned to your institution by an entity other than the ED.

Step 16 - In the Permanent - Name Address Hierarchy ID field, use Name/Address Hierarchy LookUp to select the address hierarchy used to determine the permanent address for electronic loan processing.

Step 17 - In the Local - Name Address Hierarchy ID field, use Name/Address Hierarchy LookUp to select the address hierarchy used to determine the local address for electronic loan processing.

Step 18 - In the Temporary - Name Address Hierarchy ID field, use Name/Address Hierarchy LookUp to select the address hierarchy used to determine the temporary address for electronic loan processing.

Step 19 - In the Start Date Tolerance field, enter the number of days tolerance for the loan period start date.

- For more information, see “How Colleague Links Response Data to Colleague Applications”

Step 20 - In the End Date Tolerance field, enter the number of days tolerance for the loan period end date.

- For more information, see “How Colleague Links Response Data to Colleague Applications”

Step 21 - To flag applications not assigned a recipient on creation as electronic, select the Electronic Appl option.

- For information about imports, see “Importing Response and Disbursement Roster Data”.

Step 22 - In the CommonLine Release field, enter the CommonLine Release number supported by the school. The release level on the recipient level overrides this value.

Step 23 - Save and exit the form.

Note: To be exported from Colleague and electronically transmitted to a recipient agency, the Electronic Appl option must be selected.

ALERT! If the application is not flagged as “electronic,” Colleague transmits disbursements regardless of the existence of a CommonLine Disbursement Roster record.

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Setting Up Office Defaults for Loan Processing

Responsibility:

Timeframe:

Complete the following steps to define your office defaults for loan processing.

Step 1 - Access the Loan Office Defaults (LODF) form.

Step 2 - Use FA Office LookUp to select an office to maintain.

Step 3 - In the Deferment Request Code field, enter the default deferment request code for the office.

Step 4 - In the Capitalization Code field, enter the default capitalization code for the office.

Step 5 - In the EFT Authorization Code field, enter the default EFT authorization code for the office.

Step 6 - In the Lender ID field, use Lenders ID LookUp to select a default lender for the office.

Step 7 - In the Guarantor ID field, use Guarantor ID LookUp to select a default guarantor for the office.

Step 8 - In the Recipient ID field, use Recipient ID LookUp to selection a default application recipient for the office.

Step 9 - To have Colleague attempt to combine related subsidized Stafford and unsubsidized Stafford loans on the same application, select the Combine Sub/ Unsub field.

If this option is selected, Colleague always attempts to link a Federal Stafford loan, subsidized or unsubsidized, to an existing application with a solo Federal Stafford loan counterpart.

Colleague identifies subsidized Stafford loans by the GSL award category and unsubsidized Stafford loans by the USTF award category. Use the Award Category field on the Award Definition (AWD) form to select an award category for a loan award.

Step 10 - In the Fed App Form Code field, enter a code that indicates the version of the application and prom note.

Step 11 - In the Serial Loan Code field, enter a valid serial loan code.

Step 12 - In the Prom Note Deliv Code field, enter a code that describes the best method for delivering the promissory note.

Note: If you have already entered a guarantor ID, Colleague will limit the list of valid lender IDs to lenders who have been associated with the guarantor on the Lending Inst Definition (LID) form or the Loan Guarantor (GUAR) form.

Note: If you have already entered a lender ID, Colleague will limit the list of guarantor IDs to guarantors who have been associated with the lender on the Lending Inst Definition (LID) form or the Loan Guarantor (GUAR) form.

Step 13 - In the Hold/Release Default field, enter a default Hold/Release Status for the office.

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Step 14 - In the School ID field, enter the Office of Postsecondary Education (OPE) identification number assigned by the Department of Education (ED) to the office.

Step 15 - In the Non-Ed Branch ID field, enter the branch or campus ID assigned to the office by an entity other than the ED.

Step 16 - In the Permanent - Name Address Hierarchy ID field, use Name/Address Hierarchy LookUp to select the address hierarchy used to determine the permanent address for electronic loan processing.

Step 17 - In the Local - Name Address Hierarchy ID field, use Name/Address Hierarchy LookUp to select the address hierarchy used to determine the local address for electronic loan processing.

Step 18 - In the Temporary - Name Address Hierarchy ID field, use Name/Address Hierarchy LookUp to select the address hierarchy used to determine the temporary address for electronic loan processing.

Step 19 - Save your office defaults.

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Setting Up Student Defaults for Loan Processing

Responsibility:

Timeframe:

Complete the following steps to maintain student defaults for loan processing.

Step 1 - Access the Loan Application Defaults (LADF) form.

Step 2 - Use Person LookUp to select the student whose defaults you want to maintain.

Step 3 - In the Deferment Request Code field, enter the default deferment request code for the student.

Step 4 - In the Capitalization Code field, enter the default capitalization code for the student.

Step 5 - In the EFT Authorization Code field, enter the default EFT authorization code for the student.

Step 6 - In the Lender ID field, use Lenders ID LookUp to select a default lender for the student.

Step 7 - In the Guarantor ID field, use Guarantor ID LookUp to select a default guarantor for the student.

Step 8 - In the Recipient ID field, use Recipient ID LookUp to selection a default application recipient for the student. Recipients are maintained on the Recipient Agency (RECP) form.

Step 9 - To have Colleague attempt to combine related subsidized Stafford and unsubsidized Stafford loan on the same application, select the Combine Sub/ Unsub field. If this option is selected, Colleague always attempts to link a Federal Stafford loan, subsidized or unsubsidized, to an existing application with a solo Federal Stafford loan counterpart. Colleague identifies subsidized Stafford loans by the GSL award category and unsubsidized Stafford loans by the USTF award category. Use the Award Category field on the Award Definition (AWD) form to select an award category for a loan award.

Step 10 - In the Fed App Form Code field, enter a code that indicates the version of the application and prom note.

Step 11 - In the Serial Loan Code field, enter a valid serial loan code.

Step 12 - In the Prom Note Deliv Code field, enter a code that describes the best method for delivering the promissory note.

Note: If you have already entered a guarantor ID, Colleague will limit the list of valid lender IDs to lenders who have been associated with the guarantor on the Lending Inst Definition (LID) form or the Loan Guarantor (GUAR) form.

Note: If you have already entered a lender ID, Colleague will limit the list of guarantor IDs to guarantors who have been associated with the lender on the Lending Inst Definition (LID) form or the Loan Guarantor (GUAR) form.

Step 13 - In the Borrower ID field, use Person LookUp to select the default non-student borrower for the student for PLUS and alternative loans. Colleague evaluates the following:

- State of Legal Residence
- Citizenship Status

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Non-student borrowers are selected from individuals in the PERSON file of the Core System. If the individual that you need does not exist, use the Name and Address Entry (NAE) form in the Core System to add the individual to the PERSON file.

Step 14 - In the State of Legal Residence field, verify the state of legal residence of the non-student borrower. If necessary, enter the code that describes the state of legal residence. When you first select the non-student borrower ID, Colleague defaults the state of primary residence into this field. The state of primary resident (RESIDENCE.STATE) is stored in the PERSON file. It is maintained in the Core System on the Name and Address Entry (NAE) form in the Res State field and on the Additional Demographic (DADD) form in the Residence State field.

Step 15 - In the Date of Legal Residence field, enter the date in which the non-student borrower became a legal resident in his/her state.

ALERT! If you delete the current borrower ID, Colleague clears the following fields:

- ①○ State of Legal Residence
- ①○ Date of Legal Residence
- ①○ Citizenship Status
- ①○ Outstanding Loans

If you have deleted the borrower ID in error, simply cancel from the form to preserve the previously saved data.

Note: Colleague evaluates the State of Legal Residence field only at the time that you select the non-student borrower ID. Therefore, if the state of primary residence (RESIDENCE.STATE) is modified after selection of the non-student borrower ID, the State of Legal Residence field (LA.NSTU.RES.STATE) is not updated to reflect the change.

Step 16 - In the Citizenship Status field, verify the citizenship status of the non-student borrower. If necessary, enter the code that describes the citizenship status. When you first select the non-student borrower ID, Colleague evaluates the citizenship status of the non-student borrower. Colleague first looks at the primary citizenship. The primary citizenship (CITIZENSHIP) is stored in the PERSON file and maintained in the Core System on the Biographic Information (BIO) form in the Citizen field. It is also displayed in the Citizen field on the NSBI form. If the primary citizenship is USA, US, or blank, Colleague defaults a 1 into the Citizenship status field. If the primary citizenship is not USA or US, and is not blank, Colleague looks at the alien status. The alien status (ALIEN.FLAG) is stored in the PERSON file and maintained in the Core System on the Foreign Person Information (FINF) form in the Alien Reg Number field. The FINF form is normally completed for persons residing outside the country of residence of your institution. If the alien status is (R)esident Alien, Colleague defaults a 2 into the Citizenship Status field. Otherwise, Colleague leaves the Citizenship status field blank.

Step 17 - In the Outstanding Loans field, enter the code that indicates whether the non-student borrower has any outstanding Federal Stafford, Federal Supplemental Loan for Students (SLS), Federal PLUS, or Federal Consolidation loan disbursed before July 1, 1993.

Step 18 - If this is an alternative application, in the Total Loan Debt field, enter the total amount of outstanding loan debt (undergraduate and graduate) for the nonstudent borrower prior to this application, as known by your institution. This amount should include federal and alternative loans.

Step 19 - Save and exit the form.

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Note: Colleague evaluates the Citizenship Status field only at the time that you select the non-student borrower ID. Therefore, if the primary citizenship (CITIZENSHIP) or alien status (ALIEN.FLAG) are modified after selection of the non-student borrower ID, the Citizenship Status field (LA.NSTU.CITIZENSHIP.STATUS) is not updated to reflect the change.

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the CLNA Process

Responsibility:

Timeframe:

Having completed the setup, you are now ready to test the use of CLNA at your institution. Complete the following steps:

Step 1 - In your test account, run the CLNA process with a representative sample of student loan awards. Use a savedlist selected from TC.ACYR or specify student IDs.

Step 2 - First run the CLNA process in a “Report Only” mode of **Y** (yes). Review the report to understand the data that will be created. Pay particular attention to the error report, if any. If you don't understand the report, contact Datatel's Solution Center for assistance.

Step 3 - Once you understand the data being produced, run the CLNA process with “Report Only” mode of **N**. This actually creates the loan application records.

Step 4 - Access sample loan application records on the Loan Application (LAPP) form and it's associated detail forms. Check the data being produced.

Step 5 - Run the CLNA process on a broader population in your test account, following Step 1 through Step 4 -

Step 6 - After you are sure that the CLNA process builds your records properly, you may complete Step 1 through Step 5 in your live account.

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Setting Up Electronic Loan Processing Award Codes

Responsibility:

Timeframe:

Complete the following steps to set up an award code for electronic loan processing.

Step 1 - Access the Award Definition (AWD) form.

Step 2 - Use Award LookUp to select the ID of the award that you want to define. If the award ID exists, Colleague displays the current attributes for the selected award ID.

If the award ID does not exist, enter **A** to add the new award ID.

Step 3 - In the Description field, enter a brief description of the award. This description displays with the award code. Use the description to describe the purpose and intended use of this award so that you can easily distinguish this award from others.

Step 4 - In the Destination field, enter the code that describes how funds from this award will be applied against a student's account. If using EFT disbursement rosters for transmittal, typical entries include the following:

- 1 - Accounts Receivable
- 6 - Loan

If not using EFT disbursement rosters for transmittal, typical entries include the following:

- 2 - Cash Payment
- 4 - External Fund

Step 5 - In the Category field, enter the code that describes the category with which this award is associated. The options are the following:

- For Subsidized Stafford Loan, enter GSL
- For Unsubsidized Stafford Loan, enter USTF
- For PLUS Loan, enter PLUS

Award categories are used to group together award codes that have similar attributes for Financial Aid Transcript reporting. Award categories are also used to determine the application type for electronic loan processing. Award category codes are defined on the Award Category Definition (ACD) form.

Step 6 - In the Award Type field, enter the code that describes the type of award. Award type codes are used to indicate the type of financial aid award for reporting purposes.

ALERT! Once funds have been awarded for this award, you cannot change the destination code.

Note: Destination 7 is not recommended for electronic loan award codes.

Options include the following:

- F - Federal
- S - State
- I - Institutional
- O - Other

Step 7 - In the Dflt Action field, enter the code that describes the default action status for the award. Award action codes are used to indicate the action status of an award. The default award action status code is assigned when the award is applied to the student. You can override the default award action

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status for a student award on the Award Detail Entry (AIDE) form, the Award Period View (AWPV) form, or Detail Award View (DAV) form.

Award action codes are defined on the Award Action Definition (ACT) form.

Step 8 - In the Need/Cost/EFC field, enter the code that describes the offset for this award. Your options are the following:

- For Subsidized Stafford Loan, enter **N** for Need
- For Unsubsidized Stafford Loan, enter **F** for Family Contribution
- For PLUS Loan, enter **F** for Family Contribution

Need/cost codes are used to indicate whether an award offsets a student's need or family contribution (when calculating unmet need) or cost of attendance (when calculating unmet cost).

Step 9 - In the Priority field, enter the default transmittal priority for this award. Priorities are used during transmittal to determine the order in which awards are applied against charges. Lower numbered awards are evaluated first, higher numbered last. You can override the transmittal priority for a given student award on the Detail Award View (DAV) form or Award Period View (AWPV) form.

Note: This field is required for awards with a destination code of 1, 6, or 7.

Packaging Distribution Attributes

Step 1 - In the Distribution Type field, enter the code that describes the rounding type used by the distribution logic when distributing an award.

Options include the following:

- H - Highest: Colleague rounds up.
- L - Lowest: Colleague rounds down.
- C - Closest: Colleague rounds to the nearest unit.

Step 2 - In the Distribution Unit field, enter the monetary unit used by Colleague to round award period amounts when distributing an award. For example, if you enter **1**, Colleague rounds to the nearest one unit. If you enter **10**, Colleague rounds to the nearest 10 unit.

Step 3 - In the Distribution Apply field, enter the code that describes the how and where to apply unallocated amounts remaining from the distribution of the award.

Options include the following:

- B - Backward from Last
- F - Forward from First
- A - Apply Before Next Split
- E - End - all in the Last
- S - Start - all in the First

Step 4 - The Book/Allowance field is used only if a third-party bookstore interface is used with Colleague. In this field, enter **Y** to indicate that this award is considered during the maximum book allowance during the term being processed for bookstore purchases.

Electronic Loan Attributes

Step 1 - Detail on the Loan Definition field to access the Loan Award Definition (LAWD) form.

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Step 2 - In the First Appl Year field, enter the first award year for which entry of an award on the Award Detail Entry (AIDE) form will generate a loan application record. This field is required for electronic loan processing.

Alternative Loan Attributes

Step 1 - In the Alternative ID field, enter the identification number of the alternative loan. The alternative ID identifies an award as an alternative loan for the purpose of electronic loan processing. The alternative ID is assigned by an external organization. You can obtain alternative IDs from your CommonLine Network service provider or from the NCHELP (National Council of Higher Education Loan Programs) web site (<http://www.nchelp.org>). Colleague will not allow an alternative ID for an award with a category of PLUS, GSL (subsidized Stafford), or USTF (unsubsidized Stafford).

Step 2 - In the Category field, use Award Category LookUp to select the desired award category. You have the following options:

- For Subsidized Stafford Loan, enter GSL
- For Unsubsidized Stafford Loan, enter USTF
- For PLUS Loan, enter PLUS

Award categories are used to group together award codes that have similar attributes for Financial Aid Transcript reporting. Award categories are also used to determine the application type for electronic loan processing. Award category codes are defined on the Award Category Definition (ACD) form.

Step 3 - In the Student Borrower field, enter **Y** if the student is the borrower. The student borrower code applies to alternative loans only. The alternative ID, defined on this form, identifies an award as an alternative loan.

Options for the student borrower code include:

- (Y)es
- (N)o
- (B)lank

If you receive the error Student Borrower flag applies to Alternative Loans only when you update, you should do one of the following:

- If the award is an alternative loan, in the alternative ID field, enter the identification number of the alternative loan. Colleague will not allow an alternative ID for an award with a category of PLUS, GSL (subsidized Stafford), or USTF (unsubsidized Stafford).
- If the award is not an alternative loan, delete the student borrower code from the Student Borrower field.

Note: For alternative loans with student and non-student borrowers, you will need to establish separate award codes for each borrower type.

Fee/Rebate Percent Attributes

Step 1 - In the Fee Percent field, enter the Direct Loan fee percent associated with the Activate Date.

Step 2 - In the Int Rbt Percent field, enter the interest rebate percent associated with the Activate Date. The interest rebate percent for Direct Loan is defined by the Department of Education. The interest rebate percentage is used to determine an upfront rebate amount for Direct Loans.

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Step 3 - In the Activate Date field, enter the date that the associated Fee Percent and Interest Rebate Percent begins. This date is used to determine which Fee Percent and Interest Rebate Percent are used in calculations. Colleague compares the Activate Date to the first disbursement date in the loan code assigned to the student through the ADCM form in order to calculate the fee percent and interest rate rebate that may apply to a student's loan. The disbursement dates associated to a loan code through ADCM indicate when a student's loan is scheduled for disbursement and transmittal to AR. If the Activate Date is before the first disbursement date, then transmittal will use the Fee Percent and Interest Rate Rebate Percent for that Activate Date.

Step 4 - Update from the LAWD form to save your changes. You are returned to the AWD form at the GL Account field.

Accounts Receivable Attributes

Step 1 - Use GL Account LookUp to select the GL account number designated as the award fund to which this award code is associated. Colleague moves the cursor to the AR Type LookUp field.

Note: When entering a successive group of Fee Percent, Interest Rebate Percent, and the Activate Date associated with both, you must enter them in chronological order from the oldest date to the newest. Colleague compares the disbursement dates for the loan with the dates you enter in the Activate Date field to determine the appropriate fee percent and interest rebate percent for the loan. The GL account number will post a credit to the General Ledger for any amount transmitted to Accounts Receivable.

Step 2 - Use AR Type LookUp to select the AR type associated with this award. AR Types are used to associate charges in Accounts Receivable to the appropriate general ledger account.

Step 3 - In the Xmit Excess field, if you selected "7" as the Destination code for this award, enter **Y**. Destination 7 awards by default transmit only enough to cover eligible charges. As such, destination 7 is not recommended for electronic loan award codes. You should enter **Y** in this field to transmit excess funds. These funds can then be refunded through Accounts Payable. Excess funds for a destination 7 award are funds that become available after the transmit excess date is reached. Excess funds are posted to the AR account as an unallocated payment (that is, not specifically allocated to any charges on an account).

Step 4 - In the TIV Category field, enter a TIV category for use in Return of Title IV Funds processing performed by the Calculate Return of Funds (ROFC) form. The Title IV category codes that you can select from are delivered with the Title IV Category Maintenance (TLCM) form. The TLCM form provides you with a means to modify the codes to accommodate future changes in regulations. You must enter a TIV category on this form for each of your institution's Title IV award funds.

Note: This field is used for Destination 7 awards only.

Yearly Budget Attributes

Step 1 - In the Yearly Budgets group, detail on the Year field to edit the Budget Amount or Max Budget Amount for a given year. Colleague displays a budget form based on the number of offices established for your institution. For an institution with a single FA office, Colleague displays the Office Fund Balance (OFBL) form. For an institution with multiple FA offices, Colleague displays the FA Budget By Office

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(FBBO) form when you detail on the Year field in the AWD form. See online help on the FBBO or OFBL forms for assistance.

Step 2 - Save your changes on the FBBO or OFBL form. Colleague displays the AWD form.

Other Award Attributes

Step 1 - If desired, detail on the Elig field to define eligibility criteria for granting this award to a student. Colleague displays the Award Eligibility Criteria (AEC) form. Finish or update from the AEC form to return to the AWD form. Colleague displays an “X” in this field if there are eligibility criteria associated with this award. Award eligibility criteria is checked during the following:

- ①○ Entry of the award on the Award Detail Entry (AIDE) form (if the Check Elig on New Award option in the FA Awarding Parameters (FAAP) form is selected).
- ①○ Transmittal of the award to Accounts Receivable. Award eligibility criteria can be overridden at the student level using the Student Eligibility Criteria (SEC) form.

Step 2 - If desired, detail on the Amount field to define parameters for determining the amount of this award to grant to a student. Colleague displays the Award Amount Definition (AAD) form. Finish or update from the AAD form to return to the AWD form. Colleague displays an “X” in this field if there is an award amount definition associated with this award. The award amount definition is checked during entry of the award on the Award Detail Entry (AIDE) form.

The award amount definition is not used during transmittal or automatic packaging.

Step 3 - If desired, detail on the Xmit field to define the limitations for transmitting the awarded amount to Accounts Receivable. Colleague displays the Award AR Xmit Limitations (AAXL) form. Finish or update from the AAXL form to return to the AWD form. Colleague displays an “X” in this field if there are transmittal limitations associated with this award.

Step 4 - If desired, detail on the Comments field to enter free-form comments about the award code. Colleague displays the Award Comments (UTED) form. Finish or update from the UTED form to return to the AWD form. Colleague displays an “X” in this field if there are comments associated with this award. To date stamp your comments while on the UTED form, type “#” as the only character on a row, then press Enter.

Note: The award eligibility criteria established on the AEC form are not used during automatic packaging. To define eligibility criteria for automatic packaging, use the Packaging Eligibility Rules (PERL) form.

Step 5 - If this award is going to be used in automatic packaging, select the Packaging option. Selecting the Packaging option does not prevent manual or batch awarding of this award.

Step 6 - Save the award code.

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Setting Up Award Disbursement Code Maintenance

Responsibility: RIS

Timeframe: yearly

Note: This is done in the combined account.

Complete the following steps to set up award disbursement code maintenance.

Step 1 - Access the Award Disbursement Code Maintenance (ADCM) form. Colleague displays the ADCM form with the cursor in the Academic Year Lookup.

Step 2 - Enter the Academic Year for the award disbursement code you want to maintain.

Step 3 - In the Award Disb Code lookup, enter the Award Disbursement Code ID.

Step 4 - In the Disb Code Type field, select one of the following codes to indicate the type of award disbursement code you are creating:

- P - Pell.
- L - Direct Loan.
- C - Commonline Loan.
- B - Both Pell and Direct Loan.
- A - All.

When entering a Direct Loan (L), Both (B), or All (A) type code, the Acad Year Start and End Date fields are required, and the first disbursement you enter in the Anticipated Disbursements field must be within seven days of the Disb Period Start Date. When entering a Pell (P) type code, the first disbursement you enter in the Anticipated Disbursements field must be within seven days of the Disb Period Start Date. You can use the Pell Disbursement Code, Direct Loan Code, and Commonline Code fields on The Attendance Pattern Definition (ATPC) screen to associate default disbursement codes with each of your attendance patterns. The codes you enter in those fields must be of the correct type that you enter here. For example, if you do a Standard LookUp on the Direct Loan Code field, Colleague lists only those disbursement codes that have a type of L, B, or A. The same controls are on other screens where you have the ability to override default disbursement codes for individual awards. For example, on the Direct Loan Application (DLAN) screen, you can enter only those codes that have a type of L, B, or A.

Step 5 - In the Description field, enter a description to uniquely identify this award disbursement code.

Step 6 - In the Comments field, enter free-form comments about this award disbursement code.

Step 7 - In the Disb Period Start Date field, enter the start date for the award period to which this code applies. The date you enter here is the date when the classes begin for the specific period covered by the code.

Step 8 - In the Disb Period End Date field, enter the end date for the award period to which this code applies. The date you enter here is the date when classes end for the period covered by this award disbursement code.

Step 9 - In the Anticipated Disbursements window, enter the date, weight, and awarding period for disbursements. The date represents the earliest date that the award should transmit. No transmittal will take place before this date. The award disbursement code determines the default disbursement profile for the awards associated with the award application. The disbursement profile identifies the number of

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disbursements, the disbursement dates, and the amount of the disbursements. Use this field to enter the weight for distributing award proceeds for this disbursement date. Colleague uses the distribution weight to determine what proportion of the award to distribute. However, distribution weights are, in fact, proportional relationships. Each weight represents a proportion of the total award. For example, for three disbursements, Colleague interprets weights 1, 1, and 1 as $1/3$, $1/3$ and $1/3$. Each distribution is calculated by dividing its weight by the total (that is the weight of 1 is divided by the total of 3). The weight must be between .01 and 99.99.

Step 10 - In the Awarding Period field, enter the Colleague award period for the anticipated disbursement date. Colleague uses the award period that applies to the anticipated disbursement date to transmit actual disbursements to Accounts Receivable.

Step 11 - Save your Award Disbursement Codes.

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Defining a Lending Institution

Responsibility: RIS

Note: This is done in the combined account.

Complete the following steps to define a lending institution.

Step 1 - Access the Lending Inst Definition (LID) form.

Note: For lending institutions with multiple branches, be sure to establish *separate LENDER records for each branch*.

Step 2 - Use Lender LookUp to select the ID of the lending institution that you want to maintain.

To determine if a lender exists, at the colon prompt type LIST LENDERS WITH

LE.DE.LENDER.CODE = 'xxxxxx'

If the lender exists, Colleague displays the current attributes for the selected lender. If the lender does not exist, enter **A** to add the new lender.

Step 3 - If desired, detail on the Demographics field to maintain demographic information about the lender. Colleague displays the selected Demographic Module form from the Core System. Finish or update from the form to return to the LID form. You can access the following forms:

- ①○ Name and Address Entry (NAE)
- ①○ Biographic Information (BIO)
- ①○ Person Addresses (ADR)
- ①○ Formatted Names (FNM)

Step 4 - In the contact information fields, enter the following for the contact person at the lending institution:

- ①○ Contact Name
- ①○ Contact Title
- ①○ Phone Number
- ①○ Extension

This data is for informational purposes only. The SLI form is not used for electronic loan processing.

Step 5 - In the ED Lender ID field, enter the six-digit number assigned by the US Department of Education to the lending institution.

ALERT! To preserve database integrity, always perform a thorough search before adding a new record.

Note: If you use the Student Loan Information (SLI) form to associate a lender to a student loan award, Colleague defaults the name, phone number, and extension of the contact for the lender onto the SLI form. When you associate a lender with a loan application, Colleague uses the lender's ED identification number for electronic loan processing.

Step 6 - In the School Code field, enter the ID assigned to your institution by the lending institution.

Step 7 - In the Loan Categories group, enter the following for each award category for which this lender is valid:

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- ①○ Award Category
- ①○ Interest Rate
- ①○ Grace Period
- ①○ Repayment Period

This data is for informational purposes only. The SLI form is not used for electronic loan processing.

Step 8 - In the Guarantors group, enter the ID of a valid guarantor for the lending institution. When you enter a guarantor in this field and save the LENDERS record, Colleague adds this lender to the list of valid lenders in the GUARANTOR record of the guarantor. Guarantors are defined on the Loan Guarantor (GUAR) form.

Step 9 - In the Branch Code field, enter branch identification code for the lending institution. If the lending institution has more than one branch, use this field to record the branch identification number, if any.

Note: If you use the Student Loan Information (SLI) form to associate a lender to a student loan award, Colleague defaults the interest rate, grace period, and repayment period for the relevant award category onto the SLI form.

Note: On the electronic loan processing forms, guarantors available for selection will be limited to the valid guarantors for the selected lender, assuming you have already entered a lender.

Step 10 – In the Return Mthd field, enter the return method to be used as the default for this lender. The return method may be overridden at the disbursement level for each student’s disbursement on the Loan Disbursements (LDIS) form.

Step 11 - In the Lender Comments group, enter free-form comments about the lending institution. You can detail on any row to display a full UTED form. Update or finish from the UTED form to return to this form.

Step 12 - Save the lender record.

South Dakota Colleague System Procedures

Defining a Guarantor Agency

Responsibility: RIS

Note: This will be done in the combined account only. Loans are only certified in the combined account.

Complete the following steps to define a guarantor agency.

Step 1 - Access the Loan Guarantor (GUAR) form.

Step 2 - Use Guarantor LookUp to select the ID of the guarantor that you want to maintain. If the guarantor exists, Colleague displays the current attributes for the selected guarantor.

ALERT! To preserve database integrity, always perform a thorough search before adding a new record. If the guarantor does not exist, enter **A** to add the new guarantor.

Step 3 - In the Name field, enter the name of the guarantor. This description displays with the guarantor ID.

Step 4 - In the contact information fields, enter the following for the contact person at the guarantor agency:

- ①○ Contact Person
- ①○ Contact Title
- ①○ Contact Phone
- ①○ Contact Extension

This data is for informational purposes only.

Step 5 - In the Lender ID group, enter the ID of a valid lender for the guarantor agency. When you enter a lender in this field and save the GUARANTOR record, Colleague adds this guarantor to the list of valid guarantors in the LENDERS record of the lender. Lenders are defined on the Lending Inst Definition (LID) form.

Step 6 - In the Comments group, enter free-form comments about the guarantor agency. You can detail on any row to display a full UTED form. Update or finish from the UTED form to return to this form.

Step 7 - Save the guarantor record.

Note: On the electronic loan processing forms, lenders available for selection will be limited to the valid lenders for the selected guarantor, assuming you have already entered a guarantor.

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Defining a Recipient Agency

Responsibility: RIS

Note: This will be done in the combined account only. Loans are only certified in the combined account.

Complete the following steps to define a recipient agency.

Step 1 - Access the Recipient Agency (RECP) form.

Step 2 - Use Recipient LookUp to select the ID of the recipient that you want to maintain.

If the recipient exists, Colleague displays the current attributes for the selected recipient.

If the recipient does not exist, enter **A** to add the new recipient.

Step 3 - In the Name field, enter the name of the recipient. This description displays with the recipient ID.

ALERT! To preserve database integrity, always perform a thorough search before adding a new record.

Step 4 - In the Email Addr field, enter the electronic mail address of the recipient agency.

This is the electronic mail address designated by the recipient agency to receive electronic loan applications

Step 5 - Select the Electronic Appl option to flag loan applications with this recipient as an “electronic application.” You can override the assigned electronic application flag on the Loan Appl Certification (LAPC) form in the Electronic Appl field.

Step 6 - In the contact information fields, enter the following for the contact person at the guarantor agency:

- Contact Person
- Contact Title
- Contact Phone
- Contact Extension

This data is for informational purposes only.

Step 7 - In the CommonLine Release field, enter the release number to use to process this recipient. Applications generated by the LAPX process for this recipient will be in this release format.

Step 8 - In the Comments group, enter free-form comments about the guarantor agency.

You can detail on any row to display a full UTED form. Update or finish from the UTED form to return to this form.

Step 9 - Save the guarantor record.

Note: To be considered by the Loan Appl Export (LAPX) process, the loan application must be flagged as an “electronic application.”

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Setting Up the Processing Type Rule Table

Responsibility: RIS

Timeframe: yearly

Note: This will only be completed in the combined account. Loans are certified only in the combined account.

Complete the following steps to set up a processing type rule table.

Step 1 - Access the Loan Processing Type Rule (LTRL) form.

Step 2 - Use Academic Year LookUp to select the academic year of the rule table that you want to maintain. For example, for the 2004/2005 academic year, enter **2004**. If the academic year you wish to access is not available, see your system administrator.

Step 3 - Use Rule Table LookUp to enter the ID of the rule table that you want to maintain. If the rule table exists, Colleague displays the current attributes for the selected rule table. If the rule table does not exist, enter **A** to add the new rule table. Use the rule naming method as outlined below:

Position	Comments
1	University or Common Identifier (ie B, D, M, N, S, U or C)
2	Module identifier
3	Last digit of the year if the rule is year specific, or
3-4	Last digit of year and term indicator if the rule is term specific
3-8	As specified for common and master rules
3-8	Free format for institutional rules (except 4-8 or 5-8 for time specific rules).

Step 4 - In the Description field, enter a brief description of the rule table. This description displays with the rule table. Use the description to describe the purpose and intended use of the rule table so that you can easily distinguish it from others.

Step 5 - In the Comments field, enter free-form comments about the rule table.

Step 6 - In the Default Loan Processing Type field, enter the default processing type for this rule table. Colleague assigns the processing type you enter here to the application if no processing type is assigned to the application by the rule table (or subroutine) or if there is no rule table (or subroutine).

Step 7 - In the Rule ID field, use Rule Elements LookUp to select or create (Add) a rule. You can detail on this field to maintain a rule or add a new rule. Colleague displays the Rules Definition (RLDE) form.

Step 8 - In the Result field, enter the processing type to be assigned if the rule is passed.

Step 9 - In the Loan Processing Type Subroutine field, enter a subroutine name.

Step 10 - Save the processing type rule table. Colleague saves the processing type rule table in the RULE.TABLE.ACYR file for the selected academic year (for example, RULE.TABLE.2004 for the

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2004/2005 academic year). For information about using a processing type rule table to assign processing type to applications, see “Setting Up Institutional Defaults for Loan Processing”

Note: Pay close attention to the order of the rules in your rule table. Colleague uses the first true rule in the table and ignores all subsequent rules.

Note: You may not use both processing type rules *and* a processing type subroutine.

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Setting Up the Hold/Release Rule Table

Responsibility:

Timeframe:

Complete the following steps to set up the Hold/Release rule table.

Step 1 - Access the Hold/Release Rule (HRRL) form.

Step 2 - Use Academic Year LookUp to select the academic year of the rule table that you want to maintain. For example, for the 2004/2005 academic year, enter **2004**. If the academic year you wish to access is not available, see your system administrator.

Step 3 - Use Rule Table LookUp to enter the ID of the rule table that you want to maintain. If the rule table exists, Colleague displays the current attributes for the selected rule table. If the rule table does not exist, enter **A** to add the new rule table.

Step 4 - In the Description field, enter a brief description of the rule table. This description displays with the rule table. Use the description to describe the purpose and intended use of the rule table so that you can easily distinguish it from others.

Step 5 - In the Comments field, enter free-form comments about the rule table.

Step 6 - In the Default Hold/Release Code field, enter a validation code that specifies a Hold/Release Status. Colleague assigns the code you enter here if no code is assigned by the rule table (or subroutine) or if there is no rule table (or subroutine).

Step 7 - In the Rule ID field, use Rule Elements LookUp to select or create (Add) a rule. You can detail on this field to maintain a rule or add a new rule. Colleague displays the Rules Definition (RLDE) form.

Step 8 - In the Result field, enter the code to be assigned if the rule is passed.

Step 9 - In the Hold/Release Code Subroutine field, enter a subroutine to determine the desired Hold/Release status. Enter the name of a subroutine, developed by your institution, that returns a code from the validation code table FA.CL.HOLD.REL. This validation code is used to validate the Hold/Release Status. This subroutine should be used to determine the desired Hold/Release status for the specified student and award.

Step 10 - Save the rule table. Colleague saves the rule table in the RULE.TABLE.ACYSR file for the selected academic year (for example, RULE.TABLE 2004 for the 2004/2005 academic year).

Note: Pay close attention to the order of the rules in your rule table. Colleague uses the first true rule in the table and ignores all subsequent rules.

Note: You may not use both a default code *and* a subroutine.

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Defining Transmission and Retrieval Parameters

Responsibility: RIS

Note: This will only be done in the combined account. Loans are only certified in the combined account.

Complete the following steps to define transmission and retrieval parameters.

Step 1 - Access the Send Receive Parameters (ELSR) form.

Step 2 - In the [Transmit Parameters] Method field, enter the code that describes the default method of transmission of the export files. Colleague displays the default transmit parameters when you access the Loan Appl Export (LAPX) form for the first time.

Step 3 - For partial transmission, in the [Transmit Parameters] PC Path field, enter the default path to the PC destination directory.

Step 4 - For custom transmission, in the [Transmit Parameters] Subroutine field, enter the default name of the custom subroutine. Colleague validates that the subroutine exists and is catalogued. A template for the transmit subroutine, S.FA.SEND.SHELL, is stored in the STANDARD.FORMS file.

Step 5 - In the [Retrieve Parameters] Method field, enter the code that describes the default method of retrieval of Response File and Disbursement Roster File data. Colleague displays the default retrieve parameters when you access the Import Electronic Loan Files (IELF) form for the first time.

Step 6 - For partial retrieval, in the [Retrieve Parameters] PC Path field, enter the PC path to the files to be retrieved.

Step 7 - Save the parameters.

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Defining Report Comparison Parameters

Responsibility:

Timeframe:

Complete the following steps to define a report comparison parameter.

Step 1 - Access the Electronic Loan Compare Param (ELCP) form.

Step 2 - Use Comparison Parameter LookUp to select the comparison parameter that you want to maintain. If the comparison parameter exists, Colleague displays the current attributes for the selected comparison parameter. If the comparison parameter does not exist, enter **A** to add the new comparison parameter.

Step 3 - In the Description field, enter a brief description of the comparison parameter. This description displays with the comparison parameter ID. Use the description to describe the purpose and intended use of this comparison parameter so that you can easily distinguish this parameter from others.

Step 4 - In the Field Pos field, enter the code that describes the field position of the application or loan data to be compared. Colleague defaults the name of the comparison field in the Name field. The code entered here describes, by field position, the imported Response File data (EL.APP and EL.LOAN) to be compared. If you don't know the field position, use the validation code table to select the desired field.

Step 5 - If the data is numerical, in the Oconv field, enter the OCONV code that describes the numerical format to be used in the report. For information, see "Formatting Numerical Data".

Step 6 - Repeat Step 4 through Step 5 to add additional fields to this comparison parameter.

Step 7 - Save your parameter.

Note: The data element names in the validation code table are merely representations of the data element names in the files that actually store the actual electronic application data. For example, the borrower SSN, which is represented by B.SSN, is stored in the EL.APP file as ELAP.B.SSN and in the EL.LOAN file as ELLN.B.SSN. Each file stores identical data.

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Defining Import Override Parameters

Responsibility: RIS

Note: This will be completed in the combined account only. Loans are certified only in the combined account.

Step 1 - Access the Electronic Import Override (ELCO) form.

Step 2 - In the Copy Option field, enter the code that describes whether and how Colleague will overwrite Colleague application data (LA.ACYR) fields during the Import Electronic Loan Files (IELF) process. See “Copy Options” for a description of the codes.

Step 3 - If desired, select the Report Action option to include a status message for the copy action on the audit report produced by the Import Electronic Loan Files (IELF) process.

Step 4 - Repeat Step 2 through Step 3 to set the parameters for additional fields.

Step 5 - Save your parameters.

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Defining Application Send Required Fields Parameters

Responsibility: RIS

Note: Datatel deliverable. Do not modify.

Complete the following steps to define application send required fields parameters.

Step 1 - Access the App Send Required Fields (ELRQ) form.

Step 2 - At the FA.REQUIRED Lookup, enter the ID of the record to be maintained This is the ID of the record that identifies the fields that are required for Common Line Export.

Step 3 - At the Field No. field, enter the field number on the EL.LOAN file. This is the field number on the EL.LOAN file. This is the controller to the fields that indicate if the field is required for Guarantee Only/Guarantee & Print, Print & Guarantee or Print Only for Stafford, PLUS, and alternative loans.

Step 4 - In the Guarantee Only/Guarantee & Print column, enter Y or N to indicate whether the field is required for Stafford Loan (S), PLUS Loan (P), and Alternative Loan applications (A).

Step 5 - In the Print & Guarantee column, enter Y or N to indicate whether the field is required for Stafford Loan (S), PLUS Loan (P), and Alternative Loan applications (A).

Step 6 - In the Print Only column, enter Y or N to indicate whether the field is required for Stafford Loan (S), PLUS Loan (P), and Alternative Loan applications (A).

Step 7 - Repeat Step 3 through Step 6 to set the parameters for additional fields.

Step 8 - Save your parameters.

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Creating an Application

Responsibility:

Timeframe:

Complete the following steps to create an application.

Step 1 - Access the Award Detail Entry (AIDE) form.

Step 2 - Use Academic Year LookUp to select the academic year of the award information that you want to maintain. If the academic year you wish to access is not available, see your system administrator.

Step 3 - Use the Person LookUp to select the student whose award information you want to maintain.

Step 4 - Use Eligibility Award Period LookUp to select an award period for eligibility checking. The award period code you enter here will be the award period for which the student's eligibility is checked for each award entered on the AIDE form.

Step 5 - In the Award field, enter the code for an award defined for use with electronic applications. If the award code has already been used to make an award to the student in the selected academic year, Colleague displays the following message: “The value ____ already exists in this list.” You can detail on an award code to access the application maintenance forms. For information about setting up award code for electronic loan processing, see “Procedure for Setting Up Electronic Loan Processing Award Codes”

Step 6 - Save your changes. For information about transmittal, see “Understanding Transmittal of Electronic Loan Disbursements” .

Note: If the Check Elig on New Award option on the FA Awarding Parameters (FAAP) form is not selected, Colleague does not display the Eligibility Award Period LookUp.

ALERT! If FA-to-AR transmittal is set up for immediate transmittal and the application is not flagged as “electronic,” Colleague will transmit disbursements regardless of the existence of a CommonLine Disbursement Roster record.

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Maintaining Application Student Information

Responsibility:

Timeframe:

Complete the following steps to maintain student information for an application.

Step 1 - Access the Loan Application (LAPP) form.

Step 2 - Use Academic Year LookUp to select the academic year of the application that you want to maintain. If the academic year you wish to access is not available, see your system administrator.

Step 3 - Use Person LookUp to select the student whose application you want to maintain.

Note: You can detail to the Loan Application (LAPP) form from the following form:

- Award Detail Entry (AIDE) from Award field

If the student does not have an electronic application, Colleague displays the following message: “This student does not have any awards with loan applications.” If the student has only one application for the selected academic year, Colleague displays information for that application. Continue with **Step 5** -

Step 4 - If the student has multiple applications for the selected academic year, use Appl Sequence No LookUp to select an application. Colleague assigns a sequential number to each application when it is created. The student ID and the application sequence number are used to uniquely identify an application in the Colleague database.

Step 5 - If the application is complete, select the Ready to Send option. On the Loan Application Export (LAPX) form, you will have the option to limit your selection of application records to those flagged as “ready to send.”

Step 6 - In the Borrower Request Amt field, enter the total loan amount requested on the application. You may leave this field blank. If the application processing type is guarantee only (GO) or guarantee and print (GP), Colleague will default the current certified amount when you export the initial application from Colleague.

Step 7 - In the Deferment Request field, verify the deferment request code assigned to the application. If necessary, enter the code that indicates whether the borrower wishes to defer principal payments of the new FFELP loan(s) or applicable alternative loan(s) and all outstanding Federal Stafford and Federal PLUS loans while attending school. When the application is created, Colleague defaults the deferment request code based on your setup for electronic loan processing. For information about how Colleague assigns deferment request codes to applications, see “Setting Up Defaults”

Note: If the student has only one application, Colleague does not display the Appl Sequence No LookUp prompt.

Step 8 - In the Capitalization Req field, verify the capitalize interest code assigned to the application. If necessary, enter the code that indicates whether the borrower wishes to capitalize the interest on the unsubsidized Federal Stafford or Federal PLUS loan while in school and when the loan is in grace or deferment. When the application is created, Colleague defaults the capitalize interest code based on your setup for electronic loan processing. For information about how Colleague assigns deferment request codes to applications, see “Setting Up Defaults”

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Step 9 - In the EFT Authorization field, verify the EFT authorization code assigned to the application. If necessary, enter the code that indicates whether the borrower authorizes the school to transfer loan proceeds received by EFT to the appropriate student account. When the application is created, Colleague defaults the EFT authorization code based on your setup for electronic loan processing. For information about how Colleague assigns deferment request codes to applications, see “Setting Up Defaults”

Step 10 - In the Stu Signed Note field, enter the date that the student signed the promissory note/application.

Step 11 - Verify the accuracy of the default student program and financial aid information in the following fields of the Dflt Values column:

- ①○ Grade Level
- ①○ Enrollment Status
- ①○ Anticipated Completion Date
- ①○ Office
- ①○ Cost of Attendance
- ①○ EFC
- ①○ Estimated Financial Aid
- ①○ Student in Default

Each time you access the LAPP form, Colleague calculates and displays default student program and financial aid information based on *current* student data. During *initial* export of an application, if the corresponding field in the Appl Export column is *blank*, Colleague recalculates and exports the values in the Dflt Values column. Colleague then populates the corresponding field in the Appl Export column with value exported.

Step 12 - In the applicable fields of the Appl Export column do the following:

- ①○ If this is an initial application, enter an override to the corresponding default value.
- ①○ If this is a correction application, enter the corrected value.

During *initial* export of an application, if the corresponding field in the Appl Export column is *blank*, Colleague recalculates and exports the values in the Dflt Values column.

The recalculation of the default value is based on student data *at the time of export*. Thus the default value displayed on the LAPP form may not reflect the default value calculated at the time of export. Although Colleague populates any blank field in the Appl Export column with default value exported, you may still want to enter a value in the Appl

Export column. This will “lock in” the student data for this application and, for users not participating in electronic application processing, preserve a record of data reported on the application.

Step 13 - Save the application student information.

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Maintaining Application Certification Information

Responsibility:

Timeframe:

Complete the following steps to maintain certification information for an application.

Step 1 - Access the Loan Appl Certification (LAPC) form.

Step 2 - Use Academic Year LookUp to select the academic year of the application that you want to maintain. If the academic year you wish to access is not available, see your system administrator.

Note: You can detail to the Loan Appl Certification (LAPC) form from the following forms:

- Award Detail Entry (AIDE) from Award field
- Loan Application (LAPP) from Loan Appl Cert field

Step 3 - Use Person LookUp to select the student whose application you want to maintain.

If the student does not have an electronic application, Colleague displays the following message: “This student does not have any awards with loan applications.” If the student has only one application for the selected academic year, Colleague displays information for that application. Continue with Step 5

Step 4 - If the student has multiple applications for the selected academic year, use Appl Sequence No LookUp to select an application. Colleague assigns a sequential number to each application when it is created. The application sequence number is used to uniquely identify an application in the Colleague database.

Step 5 - In the Loan Period Code field, verify the loan period code assigned to the application. If necessary, use Loan Period LookUp to select a loan period code. When you enter a loan period code in this field, Colleague does the following:

- ①○ Defaults the start date of the loan period in the Loan Period Start field.
- ①○ Defaults the end date of the loan period in the Loan Period End field.
- ①○ Calculates the anticipated disbursement amounts for the loan award(s).

When the application is created, Colleague defaults the loan period code from the definition of the attendance pattern assigned to the student into this field. For information about setting up loan period codes, see “Award Disbursement Code Maintenance” .

Note: If the student has only one application, Colleague does not display the Appl Sequence No LookUp prompt.

ALERT! If you modify or reenter the loan period code after adjusting the anticipated disbursement amounts, Colleague recalculates the anticipated disbursement amounts based on the current disbursement profile and overwrites any overrides to the disbursement amounts. To make adjustments to loan period start and end dates or the disbursement profile (disbursement dates and apportionment) for this application, see “Maintaining Anticipated Disbursements”

Step 6 - In the School Cert Date field, enter the date that a school official signed the application, or the date that the application was electronically certified (school signature is on file).

Step 7 - In the Electronic Appl field, verify the electronic application flag assigned to the application. If desired, select the Electronic Appl option to flag this application for electronic transmission. When the application is created, Colleague defaults the electronic application flag based on your setup for electronic

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loan processing. For information about how Colleague assigns recipients to applications, see “Understanding Recipient Agencies” .

Step 8 - In the Lender ID - Appl field, verify the lender assigned to the application. If necessary, use Lenders ID LookUp to select the ID of the lender for this application. When the application is created, Colleague defaults the lender based on your setup for electronic loan processing. For information about how Colleague assigns lenders to applications, see “Understanding Lending Institutions”. The Lender ID - Stu Dflt field displays the current default lender for the student. For information about application student defaults, see “Understanding Defaults”

Note: To be exported from Colleague and electronically transmitted to a recipient agency, the Electronic Appl option must be selected.

ALERT! If the application is not flagged as “electronic,” Colleague will transmit disbursements regardless of the existence of a CommonLine Disbursement Roster record. For information about transmittal, see “Understanding Transmittal of Electronic Loan Disbursements”.

Note: If you have already entered a guarantor ID, Colleague will limit the list of valid lender IDs to lenders who have been associated with the guarantor on the Lending Inst Definition (LID) form or the Loan Guarantor (GUAR) form.

Step 9 - In the Guarantor ID - Appl field, verify the guarantor assigned to the application. If necessary, use Guarantor ID LookUp to select the ID of the guarantor for this application. When the application is created, Colleague defaults the guarantor based on your setup for electronic loan processing. For information about how Colleague assigns lenders to applications, see “Understanding Guarantor Agencies”. The Guarantor ID - Stu Dflt field displays the current default guarantor for the student. For information about application student defaults, see “Understanding Defaults”

Step 10 - In the Recipient ID - Appl field, verify the recipient assigned to the application. If necessary, use Recipient ID LookUp to select the ID of the recipient of this application. When the application is created, Colleague defaults the recipient based on your setup for electronic loan processing. For information about how Colleague assigns lenders to applications, see “Understanding Recipient Agencies”. The Recipient ID - Stu Dflt field displays the current default recipient for the student. For information about application student defaults, see “Understanding Defaults”

Step 11 - In the Process Type field, verify the processing type code assigned to the application. If necessary, enter the code that describes type of processing requested for the electronic application. When the application is created, Colleague assigns a processing type code based in the processing type rule ID on the Loan Institutional Defaults (LIDF) form. For information, see, “Understanding Defaults”

Step 12 - In the Fed App Form Code field, enter the value that defines the application and prom note.

Note: If you have already entered a lender ID, Colleague will limit the list of guarantor IDs to guarantors who have been associated with the lender on the Lending Inst Definition (LID) form or the Loan Guarantor (GUAR) form.

Step 13 - In the Serial Loan Code field, enter a valid serial loan code. This code is used to indicate if the school intends to use a new Master Promissory Note or a serial MPN.

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Step 14 - In the Prom Note Deliv Code field, enter a code that describes the best method for delivering the promissory note. This field indicates the preferred method for delivering the promissory note to the borrower. Some service providers may not support all delivery methods.

Step 15 - In the Req Amt field, enter the total loan amount requested on the application. You may leave this field blank. If the application processing type is guarantee only (GO) or guarantee and print (GP), Colleague will default the certified amount when you export the initial application from Colleague.

Step 16 - In the Awards group, verify the award codes, annual amount, disbursement dates, and disbursement amounts. To make adjustments to annual amount, disbursement dates, and disbursement amounts for this application, see “Maintaining Anticipated Disbursements”.

Step 17 - If the application is complete, select the Ready to Send option. On the Loan Appl Export (LAPX) form, you will have the option to limit your selection of application records to those flagged as “ready to send.”

Step 18 - Save the application certification information.

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Maintaining Application References

Responsibility:

Timeframe:

Complete the following steps to maintain references for an application.

Step 1 - Access the Loan Application References (LARF) form.

Step 2 - Use Academic Year LookUp to select the academic year of the application that you want to maintain. If the academic year you wish to access is not available, see your system administrator.

Step 3 - Use Person LookUp to select the student whose application you want to maintain.

Note: You can detail to the Loan Application References (LARF) form from the following forms:

- Award Detail Entry (AIDE) from Award field
- Loan Application (LAPP) from Ref field

If the student does not have an electronic application, Colleague displays the following message: “This student does not have any awards with loan applications.” If the student has only one application for the selected academic year, Colleague displays information for that application. Continue with Step 5

Step 4 - If the student has multiple applications for the selected academic year, use Appl Sequence No LookUp to select an application. Colleague assigns a sequential number to each application when it is created. The application sequence number is used to uniquely identify an application in the Colleague database.

Step 5 - In the [First Name] field of the Name FML group, enter the first name of a reference for this application. The middle initial and last name of the reference are entered in the unlabeled fields to the right of this field.

Step 6 - In the [Middle Name] field of the Name FML group, enter the middle initial of the reference for this application.

Step 7 - In the [Last Name] field of the Name FML group, enter the last name of the reference for this application.

Step 8 - In the Address group, enter the address of the reference. This group has an unlimited number of rows for entering the address. The city, state, and Zip code are entered in the City/State/Zip field.

Step 9 - In the [City] field of the City/State/Zip group, enter the city of the address of the reference.

Note: If the student has only one application, Colleague does not display the Appl Sequence No LookUp prompt. You can also enter the Zip code of the address of the reference in this field. Colleague will automatically default the associated city and state in the City and State fields and move the entered Zip code to the Zip field. Otherwise, enter the city in this field. The State and Zip code are entered in the unlabeled fields to the right of this field.

Step 10 - In the [State] field of the City/State/Zip group, enter the state of the address of the reference.

Step 11 - In the [Zip] field of the City/State/Zip group, enter the Zip code and press Enter, then enter the 4-digit Zip code extension of the address of the reference.

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Step 12 - In the Phone field, enter the phone number of the reference.

Step 13 - In the SSN field, enter the Social Security number of the reference.

Step 14 - In the Relationship field, enter the code that describes the relationship of the reference to the borrower.

Step 15 - Repeat Step 5 through Step 14 to enter information for an additional reference. You can record information for a maximum of two references.

Step 16 - If the borrower reference information is complete, select the Form Complete option.

Step 17 - Save the reference information.

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Maintaining Non-Student Borrower Information

Responsibility:

Timeframe:

Step 1 - Access the Non-Student Borrower Info (NSBI) form.

Note: You can access the Non-Student Borrower Info (NSBI) form only if the application is for a PLUS loan or for an alternative loan with a non-student borrower. Colleague looks to the attributes of the award to determine whether the loan is a PLUS loan or alternative loan with a non-student borrower. For information about award code definition, see “Setting Up Awards and Transmittal Parameters”.

Note: You can detail to the Non-Student Borrower Info (NSBI) form from the following forms:

- Award Detail Entry (AIDE) from Awards field
- Loan Application (LAPP) from Non-Stu Brwr field
- Loan Appl Certification (LAPC) from Non-Stu Borrower field

Step 2 - Use Academic Year LookUp to select the academic year of the application that you want to maintain. If the academic year you wish to access is not available, see your system administrator.

Step 3 - Use Person LookUp to select the student whose application you want to maintain.

If the student does not have a PLUS application, or an alternative application with a non-student borrower, Colleague displays the following message: “This student does not have any non-student borrower loan applications.” If the student has only one non-student borrower application for the selected academic year, Colleague displays the non-student borrower information for that application. Continue with **Step 5** -

Step 4 - If the student has multiple non-student borrower applications for the selected academic year, use Appl Sequence No LookUp to select an application. Colleague assigns a sequential number to each application when it is created. The application sequence number is used to uniquely identify an application in the Colleague database.

Step 5 - In the Non-Student Borrower ID field, use Person LookUp to select the nonstudent borrower. Colleague displays the current information for the selected non-student borrower in the following fields:

- ①○ Citizenship
- ①○ Alien Registration No.
- ①○ Drivers License State
- ①○ Drivers License Number

Colleague evaluates those fields each time you enter the NSBI form.

Note: If the student has only one non-student borrower application, Colleague does not display the Appl Sequence No LookUp prompt. Colleague also evaluates the following:

- ①○ State of Legal Residence
- ①○ Citizenship Status

However, Colleague only evaluates those two fields at the time that you select the non-student borrower ID. If you have deleted the borrower ID in error, simply cancel from the form to preserve the previously saved data. Non-student borrowers are selected from individuals in the PERSON file of the Core System. If the individual that you need does not exist, use the Name and Address Entry (NAE) form in the Core System to add the individual to the PERSON file.

For information about the origin of the display-only information, see “Understanding the Non-Student Borrower Info (NSBI) Form”. The Non-Student Borrower ID - Dflt Values field displays the current

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default non-student borrower for the student. For information about loan application student defaults, see “Understanding Defaults”

Step 6 - In the State of Legal Residence field, verify the state of legal residence of the non-student borrower. If necessary, enter the code that describes the state of legal residence.

ALERT! If you delete the current borrower ID, Colleague clears the following fields:

- Citizenship
- Alien Registration No.
- Drivers License State
- Drivers License Number
- State of Legal Residence
- Date of Legal Residence
- Outstanding Loans

Note: Colleague evaluates the State of Legal Residence field only at the time that you select the non-student borrower ID. Therefore, if the state of primary residence (RESIDENCE.STATE) is modified after selection of the non-student borrower ID, the State of Legal Residence field (LA.NSTU.RES.STATE) is not updated to reflect the change. When you first select the non-student borrower ID, Colleague defaults the state of primary residence into this field.

The state of primary resident (RESIDENCE.STATE) is stored in the PERSON file. It is maintained in the Core System on the Name and Address Entry (NAE) form in the Res State field and on the Additional Demographic (DADD) form in the Residence State field.

The State of Legal Residence - Dflt Values field displays the current default non-student borrower for the student. For information about loan application student defaults, see “Understanding Defaults”

Step 7 - In the Date of Legal Residence field, enter the date in which the non-student borrower became a legal resident in his/her state. The Date of Legal Residence - Dflt Values field displays the current default non-student borrower for the student. For information about loan application student defaults, see “Understanding Defaults”

Step 8 - In the Citizenship Status field, verify the citizenship status of the non-student borrower. If necessary, enter the code that describes the citizenship status. When you first select the non-student borrower ID, Colleague evaluates the citizenship status of the non-student borrower. Colleague first looks at the primary citizenship. The primary citizenship (CITIZENSHIP) is stored in the PERSON file and maintained in the Core System on the Biographic Information (BIO) form in the Citizen field. It is also displayed in the Citizen field on the NSBI form. If the primary citizenship is USA, US, or blank, Colleague defaults a 1 into the Citizenship status field. If the primary citizenship is not USA or US, and is not blank, Colleague looks at the alien status.

The alien status (ALIEN.FLAG) is stored in the PERSON file and maintained in the Core System on the Foreign Person Information (FINF) form in the Alien Reg Number field. The FINF form is normally completed for persons residing outside the country of residence of your institution.

Note: Colleague evaluates the Citizenship Status field only at the time that you select the non-student borrower ID. Therefore, if the primary citizenship (CITIZENSHIP) or alien status (ALIEN.FLAG) are modified after selection of the non-student borrower ID, the Citizenship Status field (LA.NSTU.CITIZENSHIP.STATUS) is not updated to reflect the change.

If the alien status is (R)esident Alien, Colleague defaults a 2 into the Citizenship Status field. Otherwise, Colleague leaves the Citizenship status field blank. The Citizenship Status - Dflt Values field displays the current default nonstudent borrower for the student. For information about loan application student defaults, see “Understanding Defaults”

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Step 9 - In the Outstanding Loans field, enter the code that indicates whether the non- student borrower has any outstanding Federal Stafford, Federal Supplemental Loan for Students (SLS), Federal PLUS, or Federal Consolidation loan disbursed before July 1, 1993.

Options include:

- (Y)es
- (N)o
- (B)lank

The Outstanding Loans - Dflt Values field displays the current default nonstudent borrower for the student. For information about loan application student defaults, see “Understanding Defaults”

Step 10 - In the Borrower in Default field, enter the code that indicates whether the nonstudent borrower is currently in default (has failed to pay) on a student loan or owes a refund on a federal grant. Options include:

- (Y)es
- (N)o
- (B)lank

Step 11 - In the Date Borrower Signed field, enter the date that the non-student borrower signed the promissory note.

Step 12 - If this is an alternative application, in the Total Loan Debt field, enter the total amount of outstanding loan debt (undergraduate and graduate) for the nonstudent borrower prior to this application, as known by your institution. This amount should include federal and alternative loans. The Total Loan Debt- Dflt Values field displays the current default nonstudent borrower for the student. For information about loan application student defaults, see “Understanding Defaults”

Step 13 - Save the non-student borrower information.

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Maintaining Co-Signer Information

Responsibility:

Timeframe:

Complete the following steps to maintain co-signer information for an application.

Step 1 - Access the Loan Application Co-Signers (LACS) form.

Step 2 - Use Academic Year LookUp to select the academic year of the application that you want to maintain.

Note: If there are one or more co-signers for an alternative loan application, your CommonLine Network service provider may request the submission of co-signer information. The Loan Appl Export (LAPX) edit subroutine does not require co-signer information for alternative loan applications. In addition, the LAPX process will export co-signer information regardless of the application type. Be sure to discuss any processing implications with your CommonLine Network service providers. If the academic year you wish to access is not available, see your system administrator.

Step 3 - Use Person LookUp to select the student whose application you want to maintain.

If the student does not have an electronic application, Colleague displays the following message: “This student does not have any awards with loan applications.” If the student has only one application for the selected academic year, Colleague displays information for that application. Continue with **Step 5** -

Step 4 - If the student has multiple applications for the selected academic year, use Appl Sequence No LookUp to select an application. Colleague assigns a sequential number to each application when it is created. The application sequence number is used to uniquely identify an application in the Colleague database.

Step 5 - In the [First Name] field of the Name FML group, enter the first name of a cosigner for this application. The middle initial and last name of the co-signer are entered in the unlabeled fields to the right of this field.

Step 6 - In the [Middle Name] field of the Name FML group, enter the middle initial of the co-signer for this application.

Step 7 - In the [Last Name] field of the Name FML group, enter the last name of the co-signer for this application.

Step 8 - In the Address group, enter the address of the co-signer. This group has an unlimited number of rows for entering the address.

Note: If the student has only one application, Colleague does not display the Appl Sequence No LookUp prompt. The city, state, and Zip code are entered in the City/State/Zip field.

Step 9 - In the [City] field of the City/State/Zip group, enter the city of the address of the co-signer. You can also enter the Zip code of the address of the co-signer in this field. Colleague will automatically default the associated city and state in the City and State fields and move the entered Zip code to the Zip field. Otherwise, enter the city in this field. The State and Zip code are entered in the unlabeled fields to the right of this field.

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Step 10 - In the [State] field of the City/State/Zip group, enter the state of the address of the co-signer.

Step 11 - In the [Zip] field of the City/State/Zip group, enter the Zip code and press Enter, then enter the 4-digit Zip code extension of the address of the co-signer.

Step 12 - In the Phone field, enter the phone number of the co-signer.

Step 13 - In the SSN field, enter the Social Security number of the co-signer.

Step 14 - If the signature of the co-signer is present, select the Signature option.

Step 15 - In the Citizenship field, enter the co-signer's citizenship status.

Step 16 - In the Gross Annual Salary field, enter the total income earned by the cosigner from his or her primary employment.

Step 17 - In the Other Income field, enter the total income earned by the co-signer from sources other than his or her primary employment.

Step 18 - Repeat Step 5 through Step 17 to enter information for an additional cosigner. You can record information for a maximum of two co-signers.

Step 19 - In the Addl Cosigner Info field, detail to go to the Addl Appl Co-Signer Info (LACI) form.

Step 20 - In Addl Borr/Cos Info, detail to go to the Addl Borrower/Co-Signer Info (LABC) form.

Step 21 - Save the co-signer information.

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Maintaining Additional Co-Signer Information

Responsibility:

Timeframe:

Complete the following steps to maintain additional borrower information for an application.

Step 1 - Access the Addl Appl Co-Signer Info (LACI) form.

Note: If there are one or more co-signers for an alternative loan application, your CommonLine Network service provider may request the submission of additional borrower information. The Loan Appl Export (LAPX) edit subroutine does not require additional borrower information for alternative loan applications. In addition, the LAPX process will export additional borrower information regardless of the application type. Be sure to discuss any processing implications with your CommonLine Network service providers.

Note: You can detail to the Addl Appl Co-Signer Info (LACI) form from the following form:

- Loan Application Co-Signers (LACS) from Addl Cosigner Info field

Step 2 - Use Academic Year LookUp to select the academic year of the application that you want to maintain. If the academic year you wish to access is not available, see your system administrator.

Step 3 - Use Person LookUp to select the student whose application you want to maintain. If the student does not have an electronic application, Colleague displays the following message: “This student does not have any awards with loan applications.” If the student has only one application for the selected academic year, Colleague displays information for that application. Continue with **Step 5** -

Step 4 - If the student has multiple applications for the selected academic year, use Appl Sequence No LookUp to select an application. Colleague assigns a sequential number to each application when it is created. The application sequence number is used to uniquely identify an application in the Colleague database.

Step 5 - In the Federal Stafford Loan field, enter the borrower’s total Federal Stafford loan debt prior to the loan period for this application (as known by your institution). This amount should include the Federal Stafford portion of the borrower’s Federal Consolidation loans, if applicable.

Step 6 - In the Federal SLS Loan field, enter the borrower’s total Federal Supplemental Loans for Students (SLS) debt prior to the loan period for this application (as known by your institution). This amount should include the Federal SLS portion of the borrower’s Federal Consolidation loans, if applicable.

Note: If the student has only one application, Colleague does not display the Appl Sequence No LookUp prompt.

Step 7 - In the HEAL field, enter the total Health Profession Programs (HPP) debt prior to the loan period for this application (as known by your institution).

Step 8 - In the Perkins field, enter the total Perkins loan debt prior to the loan period for this application (as known by your institution).

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Step 9 - In the Other field, enter the borrower's total other student educational loan debt prior to the loan period for this application (as known by your institution). This amount should include both federal and alternative loans.

Step 10 - In the Other loans this period field, enter the borrower's total other student educational loan debt for the loan period for this application. This amount should include both federal and alternative loans.

Step 11 - If the borrower has been granted credit under a different name, select the Credit under different name option.

Step 12 - In the Borrower Gross Annual Salary field, enter the total income earned by the borrower from his or her primary employment.

Step 13 - In the Borrower Other Income field, enter the total income earned by the borrower from sources other than his or her primary employment.

Step 14 - Save the additional co-signer information.

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Maintaining Additional Borrower/Co-Signer Information

Responsibility:

Timeframe:

Complete the following steps to maintain additional borrower/co-signer information for an application.

Step 1 - Access the Addl Borrower/Co-Signer Info (LABC) form.

Step 2 - Use Academic Year LookUp to select the academic year of the application that you want to maintain. If the academic year you wish to access is not available, see your system administrator.

Note: You can detail to the Addl Borrower/Co-Signer Info (LABC) form from the following form:

- Loan Application Co-Signers (LACS) from Addl Borr/Cos Info field

Step 3 - Use Person LookUp to select the student whose application you want to maintain.

If the student does not have an electronic application, Colleague displays the following message: “This student does not have any awards with loan applications.” If the student has only one application for the selected academic year, Colleague displays information for that application. Continue with **Step 5** -

Step 4 - If the student has multiple applications for the selected academic year, use Appl Sequence No LookUp to select an application. Colleague assigns a sequential number to each application when it is created. The application sequence number is used to uniquely identify an application in the Colleague database.

Step 5 - In the Monthly Housing Payment field, enter the Borrower/Cosigner monthly housing payment.

Step 6 - In the Monthly Income field, enter the borrower/cosigner's monthly income amount from employment.

Step 7 - In the Other Income field, enter the borrower/cosigner's total income earned from sources other than primary employment.

Step 8 - In the Source of Other Income field, enter the source of the borrower/ cosigner’s Other Income amount.

Step 9 - In the Credit Info Indicator field, enter the Borrower/Cosigner Credit Information Indicator.

Note: If the student has only one application, Colleague does not display the Appl Sequence No LookUp prompt.

Note: As of 7/30/1999, this field was deleted from CommonLine Release 4 and replaced with filler. This indicates for whom the credit/employment information is specified.

Step 10 - In the Owner/Rent Indicator field, enter the appropriate code that specifies whether or not the borrower/cosigner owns or rents property.

Step 11 - In the Self Employed Indicator field, enter Y if the borrower/cosigner is selfemployed; otherwise, enter N.

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Step 12 - In the Company Name field, enter the name of the borrower/cosigner's current employer or company.

Step 13 - In the Position Description field, enter the description of the borrower/ cosigner's position at work.

Step 14 - In the Years at Employer field, enter the number of years the borrower/ cosigner has been employed.

Step 15 - In the Address field, enter the borrower/cosigner's previous address. The Previous Information window should be maintained if the borrower/ cosigner has been at their current address for less than one year, or at their current place of employment for less than two years.

Step 16 - In the City field, enter the borrower/cosigner's previous city.

Step 17 - In the State field, enter the borrower/cosigner's previous state.

Step 18 - In the Zip field, enter the borrower/cosigner's previous zip code.

Step 19 - In the Suffix field, enter the borrower/cosigner's previous 4-digit Zip code extension.

Step 20 - In the Employer field, enter the name of the borrower/cosigner's previous employer.

Step 21 - In the Position field, enter a description of the borrower/cosigner's previous position.

Step 22 - In the Phone field, enter the borrower/cosigner's previous employer telephone number. This field should contain the 3-digit area code as well as the 7-digit phone number

Step 23 - Save the additional borrower/cosigner information.

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Maintaining a Record of Loan Entrance/Exit Interviews

Responsibility:

Timeframe:

Complete the following steps to maintain references for an application.

Step 1 - Access the Loan Entrance/Exit Interviews (LEEI) form.

Step 2 - Use Person LookUp to select the student whose record you want to maintain. The LEEI form is not year-specific. Therefore, the comments related to loan entrance/exit interview activity will be for the student's entire career.

Step 3 - In the [Entrance Interview] Date field, enter the date of the entrance interview.

Step 4 - In the [Entrance Interview] Comments group, enter free-form comments about the entrance interview. You can detail on any row to display a full UTED form. Update or finish from the UTED form to return to this form.

Step 5 - In the [Exit Interview] Date field, enter the date of the exit interview.

Step 6 - In the [Exit Interview] Comments group, enter free-form comments about the exit interview. You can detail on any row to display a full UTED form. Update or finish from the UTED form to return to this form.

Step 7 - Save the entrance/exit interview record.

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Terminating an Application

Responsibility:

Timeframe:

Complete the following steps to terminate an application (prior to guarantee).

Step 1 - Access the Loan Appl Certification (LAPC) form.

Step 2 - Use Academic Year LookUp to select the academic year of the application that you want to maintain. If the academic year you wish to access is not available, see your system administrator.

Step 3 - Use Person LookUp to select the student whose application you want to maintain.

Note: You can detail to the Loan Appl Certification (LAPC) form from the following forms:

- Award Detail Entry (AIDE) from Award field
- Loan Application (LAPP) from Loan Appl Cert field

If the student does not have an electronic application, Colleague displays the following message: “This student does not have any awards with loan applications.” If the student has only one application for the selected academic year, Colleague displays information for that application. Continue with **Step 5** -

Step 4 - If the student has multiple applications for the selected academic year, use Appl Sequence No LookUp to select an application. Colleague assigns a sequential number to each application when it is created. The student ID and the application sequence number are used to uniquely identify an application in the Colleague database.

Step 5 - To terminate the application, select the Terminate Appl option. This is a withdrawal of the application prior to guarantee, and not a loan cancellation. To cancel the loan(s) after guarantee or to cancel a loan disbursement, use the LDIS form.

Step 6 - Save your changes to the application.

Step 7 - Use the Loan Appl Export (LAPX) process to export the changes to the application. For information about the Loan Appl Export (LAPX) process, see “Exporting Application and Loan Data”

Note: If the student has only one application, Colleague does not display the Appl Sequence No LookUp prompt.

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Linking Sub/Unsub Stafford Loans to the Same Loan Application

Responsibility:

Timeframe:

Complete the following steps to link Stafford loans (that is, subsidized and unsubsidized) associated with separate loan applications to the same loan application.

Step 1 - Access the Loan Disbursements (LDIS) form. To link and unlink loan awards, you must access the Loan Disbursements (LDIS) form from a menu prompt.

Note: Completing this procedure may *delete* a loan application record and/or *change* the association of a loan award record to a loan application record (and, therefore, the data contained therein). Be sure to review “Examples of Loan Application Management” to ensure that you are performing the procedure that is proper for your needs.

Step 2 - Use Academic Year LookUp to select the academic year of the application that you want to maintain. For example, for the 2004/2005 academic year, enter **2004**.

If the academic year you wish to access is not available, see your system administrator.

Step 3 - Use Person LookUp to select the student whose application you want to maintain.

If the student does not have an electronic loan application, Colleague displays the following message: “This student does not have any awards with loan applications.” If the student has one loan application with only one loan for the selected academic year, Colleague displays information for that loan. Continue with **Step 5** -

Step 4 - Use Award LookUp to select the loan that you want to unlink. The available loans are limited to awards associated with any loan application for the selected academic year and student.

Step 5 - In the Appl Sequence No field, delete the current Appl Sequence Number.

Step 6 - In the Appl Sequence No field, use Appl Sequence No LookUp to select the loan application to which you want to link loan award. The available applications are limited to applications for counterpart loans without a mate for the selected academic year and student.

ALERT! If this a single loan on a loan application, proceeding with this procedure will delete the loan application record.

Note: If the student has one loan application with only one loan for the selected academic year, Colleague does not display the Award LookUp prompt.

Step 7 - Save your changes.

ALERT! If this is a single loan on a loan application, proceeding with this procedure will delete the loan application record.

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Generating a New Loan Application for an Existing Loan

Responsibility:

Timeframe:

Complete the following step to generate a new loan application record for an existing loan.

Step 1 - Access the Loan Disbursements (LDIS) form. To link and unlink loan awards, you must access the Loan Disbursements (LDIS) form from a menu prompt.

Step 2 - Use Academic Year LookUp to select the academic year of the application that you want to maintain.

Note: Completing this procedure may *delete* a loan application record and/or *change* the association of a loan award record to a loan application record (and, therefore, the data contained therein). Be sure to review “Examples of Loan Application Management” to ensure that you are performing the procedure that is proper for your needs. For example, for the 2004/2005 academic year, enter **2004**. If the academic year you wish to access is not available, see your system administrator.

Step 3 - Use Person LookUp to select the student whose application you want to maintain. If the student does not have an electronic loan application, Colleague displays the following message: “This student does not have any awards with loan applications.” If the student has one loan application with only one loan for the selected academic year, Colleague displays information for that loan. Continue with **Step 5** –

Step 4 - Use Award LookUp to select the loan that you want to unlink. The available loans are limited to awards associated with any loan application for the selected academic year and student.

Step 5 - In the Appl Sequence No field, delete the current Appl Sequence Number.

Step 6 - In the Appl Sequence No field, enter **A**. Colleague generates a new loan application record.

Step 7 - Save your changes.

ALERT! If this is a single loan on a loan application, proceeding with this procedure will delete the loan application record.

Note: If the student has one loan application with only one loan for the selected academic year, Colleague does not display the Award LookUp prompt.

ALERT! If this is a single loan on a loan application, proceeding with this procedure will delete the loan application record.

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Modifying Loan Period Dates

Responsibility:

Timeframe:

The loan period code identifies a default start date, end date, and disbursement profile for the loan application¹ to which it has been associated. When you associate a loan period code to a loan application, Colleague does the following:

- ①○ Defaults the start date, end date, and disbursement profile of the loan period code.
- ①○ Calculates the anticipated disbursements for the loan awards based on the default disbursement profile.

The disbursement profile identifies the number of disbursements, the anticipated disbursement dates, and the distribution of the disbursements. The disbursement profile also indicates the award period associated with each disbursement and used to transmit the actual disbursements to the Accounts Receivable module.

By default, Colleague uses the loan period code from the definition for the attendance pattern assigned to the student. You can change the loan period code on an application on the Loan Application Certification (LAPC) form or the Loan Appl Distribution (LAPD) form. You can override the loan period code attributes (start and end dates and disbursement dates) for an application on the Loan Appl Distribution (LAPD) form only.

Modifying the loan period *end* date may result in the loss of some disbursements. The last disbursement cannot occur after the loan period end date. If you modify the loan period end date, Colleague deletes all disbursements that occur after the loan period end date. To adjust the loan period end date without losing disbursements, adjust the disbursement dates first, then adjust the loan period end date appropriately.

Complete the following steps to modify the loan period dates.

Step 1 - Access the Loan App Distribution (LAPD) form.

Step 2 - Enter the academic year of the loan application that you want to maintain. For example, for the 2004/2005 academic year, enter **2004**. You can use LookUp to select a valid academic year. If the academic year you wish to access is not available, see your system administrator.

Step 3 - Use the Person LookUp to select a student.

Note: Modifying the loan period dates may result in the loss of some disbursements. To adjust the loan period dates without losing disbursements, adjust the disbursement dates first, then adjust the loan period dates appropriately.

Step 4 - If the student has multiple loan applications, use App Sequence No LookUp to select a loan application. Colleague assigns a sequential number to each loan application when it is created. The loan application sequence number is used to uniquely identify a loan application in the Colleague database.

Step 5 - In the Loan Period Start field, if desired, modify the start date of the loan period for the loan application.

Step 6 - In the Loan Period End field, if desired, modify the end date of the loan period for the loan application. Colleague deletes all disbursements that occur after the loan period end date.

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Disbursement cancel dates are displayed on the Loan Disbursements (LDIS) form. Cancel from the form to retain your previous data.

Step 7 - Save your changes.

Note: If the student has only one loan application, Colleague does not display the App Sequence No LookUp prompt.

Note: Certain disbursement data, such as disbursement cancel date, remain associated with the disbursement number and do not shift with the loss of a disbursement.

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Modifying the Number of Disbursements

Responsibility:

Timeframe:

The loan period code2 determines the disbursement profile for the loans associated with the loan application. The disbursement profile identifies the number of disbursements, the disbursement dates, and the distribution of the disbursements.

You have the following options for modifying the number disbursements:

- Modify the loan period code
- Modify the loan period dates

You can also change the number of disbursements by modifying the loan period dates for your current disbursement profile. For more information, see “Modifying Loan Period Dates”

Note: In a loan application for both subsidized Stafford and unsubsidized Stafford loans, modifications to the loan period code or disbursement profile will affect both loans. Complete the following steps to modify the loan period code.

Step 1 - Access the Loan App Distribution (LAPD) form.

Step 2 - Enter the academic year of the loan application that you want to maintain. For example, for the 2004/2005 academic year, enter **2004**. You can use LookUp to select a valid academic year. If the academic year you wish to access is not available, see your system administrator.

Step 3 - Use the Person LookUp to select a student.

Note: Modifying the loan period code causes Colleague to recalculate the anticipated disbursement amounts based on the current disbursement profile and overwrite any overrides to the anticipated disbursement amounts.

Step 4 - If the student has multiple loan applications, use App Sequence No LookUp to select a loan application. Colleague assigns a sequential number to each loan application when it is created. The loan application sequence number is used to uniquely identify a loan application in the Colleague database.

Step 5 - In the Loan Period Code field, delete the current loan period code. Colleague deletes the associated loan period dates, disbursement profile, and anticipated disbursements. Cancel from the form to retain your previous data.

Step 6 - In the Loan Period Code field, enter a loan period code with the desired number of disbursements. Colleague defaults the following from the loan period code definition:

- loan period start date
- loan period end date
- disbursement profile

Colleague also calculates the anticipated disbursement amounts for the loan award(s) based on the disbursement profile. Loan period codes are defined on the Award Disb Code Maintenance (ADCM) form.

Step 7 - Save your changes.

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Note: If the student has only one loan application, Colleague does not display the App Sequence No LookUp prompt.

South Dakota Colleague System Procedures

Modifying Disbursement Dates

Responsibility:

Timeframe:

The loan period code³ determines the disbursement profile for the loans associated with the loan application. The disbursement profile identifies the number of disbursements, the disbursement dates, and the distribution of the disbursements.

You can override the disbursement dates for a loan application on the Loan App Distribution (LAPD) form. The anticipated disbursement date is the date your institution anticipates disbursing loan proceeds. Anticipated disbursement dates can be up to 10 dates prior to the loan period start date and cannot be after the loan period end date.

Note: In a loan application for both subsidized Stafford and unsubsidized Stafford loans, modifications to the loan period code or disbursement profile will affect both loans.

Note: Modifying the loan period dates may result in the loss of some disbursements. To adjust loan period dates without losing disbursements, adjust the disbursement dates first, then adjust the loan period dates accordingly.

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Using Hold/Release

Responsibility:

Timeframe:

CommonLine Release 4 introduced Hold/Release processing. This allows sending organizations (schools) to control the release of funds prior to actual disbursement. The Hold/Release indicator (SL.DISB.HOLD.REL.IND in Colleague) is a one-character field that acts as a flag indicating when funds should be released. A status of H (hold) indicates that a particular disbursement should not be sent (placed in hold status) until further notice is given. A status of R (release) means release the disbursement as scheduled.

Some service providers may allow schools to place all disbursements in a hold status automatically at the time of guarantee/application processing. However, schools choosing this option must then submit a release transaction for each disbursement when they are ready to receive funds for that loan. As a result, it may be preferable to default all disbursements to a release status. The Hold/Release Batch (ELHR) process can be used to place a hold or release status on a specific disbursement or multiple disbursements associated to electronic loan awards whose disbursements fall within a given date range.

The process may be run in simulation mode, or in update mode. Update mode will result in a modification of the student's SL.ACYR record, should a change be needed. This process assumes that a rule or rule subroutine be constructed to create the hold or release value per disbursement. The Hold/Release Rule (HRRL) form can be used to build this new hold/release rule.

Note: Not all service providers support Hold/Release functionality. As a result, schools should consult with their service providers to determine if Hold/Release functionality is supported.

Note: In addition, disbursements placed in a hold status for an extended period without notification of release are subject to cancellation based on service provider criteria. Most service providers will follow-up with schools prior to canceling the disbursement. Complete the following steps to use hold/release for one or more disbursements.

Step 1 - Access the Hold/Release Batch (ELHR) form.

Step 2 - Enter the academic year. For example, for the 2004/2005 academic year, enter **2004**. You can use LookUp to select a valid academic year. If the academic year you wish to access is not available, see your system administrator.

Step 3 - In the Disbursement Date From field, enter a disbursement from value to limit the selection of records.

Step 4 - In the Disbursement Date To field, enter a disbursement to value to limit the selection of records.

Note: Placing a disbursement on hold does not affect whether the disbursement will transmit.

Step 5 - In the Hold/Release Rule field, enter a valid rule ID for determining the hold/ release indicator value.

Step 6 - In the Exclude disbursements currently set to HOLD field, enter Y to exclude the updating of disbursements currently set to hold.

South Dakota Colleague System Procedures

Step 7 - In the Exclude disbursements currently set to RELEASE field, enter Y to exclude the updating of disbursements currently set to release.

Step 8 - At the Saved List Name field, enter a saved list name to be used.

Step 9 - At the Students field, enter a student ID to be used.

Step 10 - At the Awards field, enter award IDs to limit processing to those awards only.

Step 11 - At the Additional Selection Criteria field, enter Y to specify additional selection criteria.

Step 12 - Save your changes.

South Dakota Colleague System Procedures

Modifying the Loan Distribution

Responsibility:

Timeframe:

The loan period code4 determines the disbursement profile for the loans associated with the loan application. The disbursement profile identifies the number of disbursements, the disbursement dates, and the distribution of the disbursements.

You can override the weights for distributing loan proceeds on the Loan Appl Distribution (LAPD) form. Colleague uses the distribution weight to determine what proportion of the loan award to distribute on a particular disbursement date.

One way to think of distribution weights is as a series of percentages that add up to 100. However, distribution weights are, in fact, proportional relationships. Each weight represents a proportion of the total award. For example, for three disbursements, Colleague interprets weights 1, 1, and 1 as 33.33%, 33.33% and 33.34%. The weight must be between.01 and 99.99.

Note: In a loan application for both subsidized Stafford and unsubsidized Stafford loans, modifications to the loan period code or disbursement profile will affect both loans.

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Modifying Annual Loan Amounts

Responsibility:

Timeframe:

Loans are awarded on the Award Detail Entry (AIDE) form. If the loan award was defined with the First Appl Year option on LAWD, Colleague associates the loan award with a loan application. You can modify the annual amount of a loan award on the following forms:

- ①○ Loan App Certification (LAPC)
- ①○ Loan App Distribution (LAPD)
- ①○ Award Detail Entry (AIDE)

Modifying the annual loan amount on the loan application forms has the same affect as modifying the annual loan amount in the Award Detail Entry (AIDE) form. When you modify the annual amount, Colleague recalculates the anticipated disbursement amounts based on the current disbursement profile.

Note: Modifying the annual loan amount causes Colleague to recalculate the anticipated disbursement amounts based on the current disbursement profile and overwrite any overrides to the anticipated disbursement amounts.

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Modifying Anticipated Disbursement Amounts

Responsibility:

Timeframe:

The loan period code⁵ determines the disbursement profile for the loans associated with the loan application. The disbursement profile identifies the number of disbursements, the disbursement dates, and the distribution of the disbursements. When you modify the loan period code⁶ or annual loan amount, Colleague recalculates the anticipated disbursement amounts based on the current disbursement profile.

You can modify the anticipated disbursement amounts on the following forms:

- ①○ Loan App Certification (LAPC)
- ①○ Loan App Distribution (LAPD)
- ①○ Loan Disbursements (LDIS)

This is an override to the anticipated disbursement amounts calculated by Colleague based on the current disbursement profile and does not modify the disbursement profile. Colleague automatically adjusts the annual loan amount. The total disbursements cannot exceed the requested amount.

Note: Modifying the loan period code or annual loan amount causes Colleague to recalculate the anticipated disbursement amounts based on the current disbursement profile and overwrite any overrides to the anticipated disbursement amounts.

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Canceling Disbursements

Responsibility:

Timeframe:

Complete the following steps to cancel a disbursement.

Step 1 - Access the Award Detail Entry (AIDE) form.

Step 2 - Enter the academic year of the loan application that you want to maintain. For example, for the 2001/02 academic year, enter **2001**. You can use LookUp to select a valid academic year. If the academic year you wish to access is not available, see your system administrator.

Step 3 - In the Awd group, place your cursor on the loan that you want to maintain.

Note: Modifying the loan period dates may result in the loss of some disbursements. To adjust the loan period dates without losing disbursements, adjust the disbursement dates first, then adjust the loan period dates appropriately.

Step 4 - In the Aw Per Amount group for the loan, change the award amount to zero for the disbursement you want to cancel.

Step 5 - Save your changes on the AIDE form.

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Canceling an Entire Loan

Responsibility:

Timeframe:

Complete the following steps to cancel an entire loan.

Step 1 - Access the Award Detail Entry (AIDE) form.

Step 2 - Use Academic Year LookUp to select the academic year of the application that you want to maintain. For example, for the 2004/2005 academic year, enter **2004**. If the academic year you wish to access is not available, see your system administrator.

Step 3 - Use Person LookUp to select the student whose application you want to maintain.

Note: To cancel a loan disbursement, see “Canceling Disbursements”.

Step 4 - In the Award group, enter zero in the Amount field.

Step 5 - Save your changes on the AIDE form.

Note: You cannot cancel a loan if any actual disbursement (that is, the transmitted amount) is greater than zero.

South Dakota Colleague System Procedures

Exporting Application Send and Change Transaction Send Data

Responsibility:

Timeframe:

Complete the following steps to export Colleague application and loan data.

Step 1 - Access the Loan Application Export (LAPX) form.

Step 2 - In the Academic Year field, enter the academic year of the data to be exported. The LAPX process selects applications and loans for export from the SL.ACYR. ACYR represents the academic year. You can use LookUp to select a valid academic year. If the academic year you wish to process is not available, see your system administrator.

Note: Before completing the following procedure, you should create a loan application on Colleague. For more information, see “Creating an Application”.

Run Mode and Media Type

Step 1 - In the Run Mode field, enter the code that describes the run mode for this process.

Options include the following:

- P - Create Production Records
- T - Create Test Records
- R - Report Only

Step 2 - In the Media Type field, enter the code that describes the type of method being used to submit the export files. Options include the following:

- D - Diskette
- M - Mainframe Transmission
- P - PC Transmission
- T - Magnetic Tape

Transmit Parameters

Step 1 - In the Transmit Method field, enter the code that describes the method of transmission of the export files. The *first* time you access the LAPX form, Colleague displays the default transmit parameters. You may modify the transmit parameters for the export on the LAPX form. Colleague “remembers” the changes and will recall the *new* transmit parameters the next time you access the LAPX form. To recall the default transmit parameters, delete the transmit parameter fields on the LAPX form, then save your changes. Prior to requesting conformation of your changes, Colleague displays the default transmit parameters.

ALERT! To preserve the integrity of live data, use only test data to create test records.

Note: Codes “M” and “P” are valid only for CompuServe® transmissions. Codes “D” and “T” should only be used for proprietary submissions.

Step 2 - For partial transmission, in the Transmit Path field, enter the path to the PC destination directory.

Step 3 - For custom transmission, in the Transmit Subr field, enter the name of the custom subroutine.

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A template for the transmit subroutine, S.FA.SEND.SHELL, is stored in the STANDARD.FORMS file.

Export Records

Step 1 - To send new applications, select the Incl New Appl Sends option. This option also sends termination requests.

Step 2 - To send application corrections (pre-guarantee), select the Incl Appl Send Corrections option.

Step 3 - To send loan modifications (post-guarantee), select the Incl Change Transactions option. Colleague also sends return/refund amounts.

Step 4 - To resend new applications, select the Retransmit New Appl Sends option. This option requires the use of selection criteria (saved list or list of students).

Note: To perform partial transmission, you must use wIntegrate to access the Colleague host machine.

Note: Selecting this option precludes selection of the Incl New Appl Sends, Incl Appl Send Corrections, or Incl Change Transactions options.

Note: This option should only be used if an Application Send File containing new applications was never received by its designated recipient.

Step 5 - To resend return/refund amounts, enter the date from which Colleague should include return/refund amounts in the Retransmit Return Amt Date field.

Selection Criteria

Step 1 - In the Input Saved List Name field, use List Name LookUp to select a saved list of records for the Loan Appl Export (LAPX) process. Your saved list must contain a list of IDs from the SL.ACYR file. Colleague compares the IDs in your saved list to the record IDs in the SL.ACYR file and restricts your selection to the records that match.

Step 2 - In the Students group, use Student Lookup to select a student for the Loan Appl Export (LAPX) process. Colleague uses the saved list, if any, as a basis for selecting loans from the SL.ACYR file and then narrows the selection using the student IDs (SL.STUDENT.ID) in the Students group.

Step 3 - To limit records to those flagged “ready to send,” select the Limit to Ready to Send option. The Ready to Send flag can be maintained on several of the application maintenance forms.

Step 4 - In the Loan Type Code field, enter the code that describes the type of application (SL.LA.LOAN.TYPE.CODE) to select for the Loan Appl Export (LAPX) process. If you want to include all types of applications, leave this field blank. If you want to limit the applications for export to two or more types of loan applications, leave this field blank and select the Additional Selection Criteria option.

Step 5 - To specify additional selection criteria, select the Additional Selection Criteria option.

Note: This option should only be used if the original Change Transaction Send File containing the return/refund amounts was never received by its designated recipient. Construct selection criteria based on information in the SL.ACYR file.

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Step 6 - Finish or update from the LAPX form.

Note: If you leave all selection criteria fields blank and do not construct any additional selection criteria, Colleague selects *all* records in the SL.ACYR file associated with an application (LA.ACYR) that are flagged as an “electronic application.” The Electronic Appl flag (LA.ELECTRONIC.APP.FLAG) is maintained on the Loan Appl Certification (LAPC) form.

South Dakota Colleague System Procedures

Importing Response File and Disbursement Roster File Data

Responsibility: RIS

Timeframe: daily

Note: this is only run in the combined account.

Complete the following steps to import Response File and Disbursement Roster data into Colleague.

Step 1 - Access the Import Electronic Loan Files (IELF) form.

Note: If FA-to-AR transmittal is set up for immediate transmittal, the import of a disbursement roster record for a student will trigger transmittal of an electronic loan disbursement, or a portion thereof. FA transmittal can be set up for immediate transmittal in the Account Receivable module using the FA Transmittal Control (FATC) form.

Retrieve Parameters

Step 1 - In the Retrieve Method field, enter the code that describes the method of retrieval of Response File and Disbursement Roster File data. The *first* time you access the IELF form, Colleague displays the default retrieve parameters. You may modify the retrieve parameters for the import on the IELF form. Colleague “remembers” the changes and will recall the *new* retrieve parameters the next time you access the IELF form. To recall the default retrieve parameters, delete the retrieve parameter fields on the IELF form, then save your changes. Prior to requesting conformation of your changes, Colleague displays the default retrieve parameters. SD uses ‘M’ for manual.

Step 2 - For partial retrieval, in the Retrieve Path field, enter the PC path to the files to be retrieved. SD does not use this field.

Selection Criteria

Step 1 - In the Sources group, use Sources LookUp to select a recipient ID to limit your selection of records to be imported. The source of the Response File or Disbursement Roster File is selected from the RECIPIENT file. For more information, see “Source”. SD does not use this field.

Step 2 - In the Limit Import File Types field, enter the code that describes the type of files that you wish to import. You have the following options:

- R - Response Files Always do responses first.
- DR - Disbursement Roster Files Always do after responses.
- B - Both Response and Disbursement Roster Files SD does not use this option.

Note: To perform partial retrieval, you must use wIntegrate to access the Colleague host machine.

Note: If you leave the Sources group and Limit Import File Types field blank, Colleague attempts to import all files based on the selected retrieve method.

Output Saved Lists

Step 1 - If importing a Response File, in the Loan/Appl Output Saved List Name field, enter the name of a saved list. Use this output saved list in the Electronic Loan Appl Variance (ELAV) report to compare

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Colleague application and loan data to Response File data imported from a CommonLine Network service provider. Use format 'IELFRmmddy' for output name.

Step 2 - If importing a Response File, in the Guaranteed Loan Output Saved List Name field, enter the name of a saved list. Use this output saved list in the Electronic Appl Disb Variance (ELDV) report to compare Colleague disbursement data to disbursement data (Response and Disbursement Roster) imported from a CommonLine Network service provider. SD does not use this option.

Step 3 - If importing a Disbursement Roster File, in the Disb Roster Output Saved List Name field, enter the name of a saved list. Use this output saved list in the Elec Loan Disb Management (ELDM) report to list the Colleague disbursements that do not have a roster record; or that have a roster record and also have a variance between the Colleague transmitted amount and roster amount. Use format 'IELFDRmmddy' for output name.

Step 4 - Finish or update from the IELF form.

Note: when naming the HOLD file, the naming standards are: responses – IELFRmmddy.KEEP, and for rosters – IELFDRmmddy.KEEP.

South Dakota Colleague System Procedures

Reviewing Unlinked Responses

Responsibility:

Timeframe:

Complete the following steps to report on Response File application records (EL.APP) that are not linked to a Colleague application.

Step 1 - Access the Unlinked Loan Applications (ULAP) form.

Step 2 - To include guarantee detail, select the Loan Detail option. Select this option to include the guarantee detail, if any, for unlinked Response File application records (EL.APP) in the report. Otherwise, the report only lists the unlinked Response File application records (EL.APP) without any indication of whether there is associated Response File guarantee data (EL.LOAN).

Step 3 - In the Input Saved List Name field, use List Name LookUp to select a saved list of records for the report. Your saved list must contain a list of IDs from the EL.APP file. Colleague compares the IDs in your saved list to the record IDs in the EL.APP file and restricts your selection to the records that match.

Step 4 - In the Application Loan Type Code field, enter the code that describes the type of application (ELAP.LOAN.TYPE.CODE) to select for the report. If you want to include all types of applications, leave this field blank. If you want to limit the applications for export to two or more types of loan applications, leave this field blank and select the Additional Selection Criteria option.

Step 5 - To exclude terminated applications (ELAP.TERMINATED.DATE) from the report, select the Exclude Terminated option.

Step 6 - To specify additional selection criteria, select the Additional Selection Criteria option. Construct selection criteria based on information in the EL.APP file.

Step 7 - Finish or update from the ULAP form.

Note: If you leave all selection criteria fields blank and do not construct any additional selection criteria, Colleague reports on *all* unlinked Response File application records in the EL.APP file.

South Dakota Colleague System Procedures

Creating a Termination Request for Unlinked Responses

Responsibility:

Timeframe:

Complete the following steps to export termination requests for unlinked Response File application records.

Step 1 - Access the Terminate Unlinked Appls (TLAP) form.

Step 2 - To generate an audit report without actually creating export files, select the Report Only option.

Media Type

Step 1 - In the Media Type field, enter the code that describes the type of method being used to submit the export files. Options include the following:

- D - Diskette
- M - Mainframe Transmission
- P - PC Transmission
- T - Magnetic Tape

Transmit Parameters

Step 1 - In the Transmit Method field, enter the code that describes the method of transmission of the export files. The *first* time you access the TLAP form, Colleague displays the default transmit parameters. You may modify the transmit parameters for the export on the TLAP form. Colleague “remembers” the changes and will recall the *new* transmit parameters the next time you access the TLAP form. To recall the default transmit parameters, delete the transmit parameter fields on the TLAP form, then save your changes. Prior to requesting conformation of your changes, Colleague displays the default transmit parameters.

Step 2 - For partial transmission, in the Transmit Path field, enter the path to the PC destination directory.

Step 3 - For custom transmission, in the Transmit Subr field, enter the name of the custom subroutine. A template for the transmit subroutine, S.FA.SEND.SHELL, is stored in the STANDARD.FORMS file.

Selection Criteria

Step 1 - In the Input Saved List Name field, use List Name LookUp to select a saved list of records for the Terminate Unlinked Appls (TLAP) process.

Note: Only codes “M” and “P” are valid for CompuServe® transmissions. Codes “D” and “T” should only be used for proprietary submissions.

Note: To perform partial transmission, you must use wIntegrate to access the Colleague host machine. Your saved list must contain a list of IDs from the EL.APP file. Colleague compares the IDs in your saved list to the record IDs in the EL.APP file and restricts your selection to the records that match.

Step 2 - In the Application Loan Type Code field, enter the code that describes the type of application (ELAP.LOAN.TYPE.CODE) to select for the Terminate Unlinked Appls (TLAP) process. If you want to

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include all types of applications, leave this field blank. If you want to limit the applications for export to two or more types of loan applications, leave this field blank and select the Additional Selection Criteria option.

Step 3 - To exclude from export unlinked Response File applications that have been previously terminated, select the Exclude Previously Terminated option.

Step 4 - To specify additional selection criteria, select the Additional Selection Criteria option. Construct selection criteria based on information in the EL.APP file.

Step 5 - Finish or update from the TLAP form.

Note: If you leave all selection criteria fields blank and do not construct any additional selection criteria, Colleague exports a termination request for *all* unlinked Response File application records in the EL.APP file.

South Dakota Colleague System Procedures

Purging Unlinked Responses

Responsibility:

Timeframe:

Complete the following steps to delete unlinked Response File application records from the EL.APP file. This will also delete any Response File loan records (EL.LOAN) and Disbursement Roster File records (EL.ROSTER) associated with the selected unlinked Response File application records.

Step 1 - Access the Electronic Application Purge (ELPG) form.

Step 2 - To generate an audit report without actually deleting unlinked Response File records, select the Report Only option.

Step 3 - In the Input Saved List Name field, use List Name LookUp to select a saved list of records for the Electronic Application Purge (ELPG) process. Your saved list must contain a list of IDs from the EL.APP file. Colleague compares the IDs in your saved list to the record IDs in the EL.APP file and restricts your selection to the records that match.

Step 4 - In the Application Loan Type field, enter the code that describes the type of application (ELAP.LOAN.TYPE.CODE) to select for the Electronic Application Purge (ELPG) process. If you want to include all types of applications, leave this field blank. If you want to limit the applications for export to two or more types of loan applications, leave this field blank and select the Additional Selection Criteria option.

Step 5 - To specify additional selection criteria, select the Additional Selection Criteria option. Construct selection criteria based on information in the EL.APP file.

Step 6 - Finish or update from the ELPG form.

Note: If you leave all selection criteria fields blank and do not construct any additional selection criteria, Colleague purges *all* unlinked Response File records in the EL.APP file.

South Dakota Colleague System Procedures

Manually Unlinking a Response from a Colleague Application

Responsibility:

Timeframe:

Complete the following steps to manually unlink a Response File application record from a Colleague application.

Step 1 - Access the Loan Application (LAPP) form.

Step 2 - Use Academic Year LookUp to select the academic year of the application that you want to maintain. For example, for the 2004/2005 academic year, enter **2004**. If the academic year you wish to access is not available, see your system administrator.

Step 3 - Use Person LookUp to select the student whose application you want to maintain. If the student does not have an electronic loan application, Colleague displays the following message: "This student does not have any awards with loan applications." If the student has only one loan application for the selected academic year, Colleague displays information for that loan application. Continue with **Step 5** -

Step 4 - If the student has multiple loan applications for the selected academic year, use App Sequence No LookUp to select a loan application. Colleague assigns a sequential number to each loan application when it is created. The application sequence number is used to uniquely identify a loan application in the Colleague database.

Step 5 - In the App ID field, delete the current application ID.

Step 6 - Save your changes.

Note: If the student has only one loan application, Colleague does not display the App Sequence No LookUp prompt.

South Dakota Colleague System Procedures

Batch Unlinking Responses from Colleague Applications

Responsibility:

Timeframe:

Complete the following steps to unlink Response File application records from the Colleague applications to which they are currently linked.

Step 1 - Access the Unlink Elec Appls (UELA) form.

Step 2 - In the Year field, use Academic Year LookUp to select the academic year of the linked Colleague applications to be unlinked. The UELA process selects linked Colleague applications for the process from the LA.ACYSR. ACYSR represents the academic year. You can use LookUp to select a valid academic year. If the academic year you wish to process is not available, see your system administrator.

Step 3 - To generate an audit report without actually unlinking applications, select the Report Only option.

Step 4 - In the Saved List Name field, use List Name LookUp to select a saved list of records for the Unlink Elec Appls (UELA) process. Your saved list must contain a list of IDs from the LA.ACYSR file. Colleague compares the IDs in your saved list to the record IDs in the LA.ACYSR file and restricts your selection to the records that match.

Step 5 - In the Students group, use Student Lookup to select, by student, Colleague applications for the Unlink Elec Appls (UELA) process. Colleague uses the saved list, if any, as a basis for selecting records from the LA.ACYSR file and then narrows the selection using the student IDs (LA.STUDENT.ID) in the Students group.

Step 6 - In the Application Loan Type field, enter the code that describes the type of application (LA.LOAN.TYPE.CODE) to select for the Unlink Elec Appls (UELA) process. If you want to include all types of applications, leave this field blank. If you want to limit the applications for the process to two or more types of loan applications, leave this field blank and select the Additional Selection Criteria option.

Step 7 - In the Awards group, use Award Lookup to select, by award, applications for the Unlink Elec Appls (UELA) process. Colleague uses the saved list, if any, as a basis for selecting loans from the LA.ACYSR file and then narrows the selection using the award IDs (LA.AWARDS.ID) in the Students group.

Step 8 - To specify additional selection criteria, select the Additional Selection Criteria option. Construct selection criteria based on information in the LA.ACYSR file.

Step 9 - Finish or update from the UELA form.

Note: If you leave all selection criteria fields blank and do not construct any additional selection criteria, Colleague attempts to link all unlinked Colleague applications in the LA.ACYSR file.

South Dakota Colleague System Procedures

Manually Linking a Response to a Colleague Application

Responsibility:

Timeframe:

Complete the following steps to manually link an unlinked Response File application record to a Colleague application.

Step 1 - Access the Loan Application (LAPP) form.

Step 2 - Use Academic Year LookUp to select the academic year of the application that you want to maintain. For example, for the 2004/2005 academic year, enter **2004**. If the academic year you wish to access is not available, see your system administrator.

Step 3 - Use Person LookUp to select the student whose application you want to maintain. If the student does not have an electronic loan application, Colleague displays the following message: “This student does not have any awards with loan applications.” If the student has only one loan application for the selected academic year, Colleague displays information for that loan application. Continue with **Step 5** -

Step 4 - If the student has multiple loan applications for the selected academic year, use App Sequence No LookUp to select a loan application. Colleague assigns a sequential number to each loan application when it is created. The loan application sequence number is used to uniquely identify a loan application in the Colleague database.

Step 5 - In the App ID field, use Loan Appl ID LookUp to select a response.

Step 6 - Save your changes.

Note: If the student has only one loan application, Colleague does not display the App Sequence No LookUp prompt.

South Dakota Colleague System Procedures

Batch Linking Responses to Colleague Applications

Responsibility:

Timeframe:

Complete the following steps to have Colleague attempt to link unlinked Response File application records to unlinked Colleague applications using the current linking tolerances.

Step 1 - Access the Batch Link Elec Appls (LELA) form.

Step 2 - In the FA Year field, use Academic Year LookUp to Select the academic year of the unlinked Colleague applications to be linked. The LELA process selects unlinked Colleague applications for the process from the LA.ACYR. ACYR represents the academic year.

Note: Use the Loan Institutional Defaults (LIDF) form to set up loan period date tolerances for linking Response File data to Colleague data. For information about the LIDF form, see “Setting Up Institutional Defaults for Loan Processing” For information about the linking algorithm, see “How Colleague Links Response Data to Colleague Applications” You can use LookUp to select a valid academic year. If the academic year you wish to process is not available, see your system administrator.

Step 3 - To generate an audit report without actually linking applications, select the Report Only option.

Step 4 - In the Saved List Name field, use List Name LookUp to select a saved list of records for the Batch Link Elec Appls (LELA) process. Your saved list must contain a list of IDs from the EL.APP file. Colleague compares the IDs in your saved list to the record IDs in the EL.APP file and restricts your selection to the records that match.

Step 5 - In the Application Loan Type Code field, enter the code that describes the type of application (LA.LOAN.TYPE.CODE) to select for the Batch Link Elec Appls (LELA) process. If you want to include all types of applications, leave this field blank. If you want to limit the applications for the process to two or more types of loan applications, leave this field blank and select the Additional Selection Criteria option.

Step 6 - To exclude from export unlinked Response File applications that have been previously terminated, select the Exclude Previously Terminated option.

Step 7 - To specify additional selection criteria, select the Additional Selection Criteria option. Construct selection criteria based on information in the EL.APP file.

Step 8 - Finish or update from the LELA form.

Note: If you leave all selection criteria fields blank and do not construct any additional selection criteria, Colleague attempts to link *all* unlinked Response File application records in the EL.APP file to an unlinked Colleague application.

South Dakota Colleague System Procedures

Loan Appl Response Errors (LARE) Form

Responsibility:

Timeframe:

Use the Loan App Response (LARE) form to review the error codes from the most recent Response File. The CommonLine Response File is created by a CommonLine Network service provider to confirm receipt of Application Send File or Change Transaction Send File data, identify errors, and report guarantee data. If there are any errors, error codes are returned as part of the Response File. For information about Response Files, see “CommonLine Response File”. You can use the Import Electronic Loan Files (IELF) process to import Response File data into Colleague. For information about the IELF process, see “Importing Response and Disbursement Roster Data”.

Colleague displays the error codes² from the Response File with the latest date (not necessarily the Response File that was last imported). If you import a Response File with an earlier date than the Response File data currently displayed, Colleague does not display those Response File errors. The Appl Error group displays the codes for errors discovered in basic application data (Application Send File) during the guarantee process. For information about the Application Send File, see “CommonLine Application Send File”

Each Loan - Error group displays the codes for errors that inhibit processing of post- guarantee changes (Change Transaction Send File) to the application and/or loan. The Loan - Error group also identifies the portion of the change record that resulted in the error. For information about the Change Transaction Send File, see “CommonLine Change Transaction Send File” .

Note: To ensure that the errors displayed are based on the most current Response File data, be sure to retrieve and import Response Files in a timely manner.

South Dakota Colleague System Procedures

Loan Summary (LSUM) Form

Responsibility:

Timeframe:

The Loan Summary (LSUM) form displays all loans awarded to a student for all award years. The LSUM form also displays the National Student Loan Data System (NSLDS) flags for default, discharge, repayment, and bankruptcy. Colleague displays the NSLDS information, if any, for the most recent CI.ACYR record for the EDE calculation input type. Users can detail to the Loan Information (LI##3) form or the Other Loan/Pell Information (OL##) form for the relevant year.

Users can detail to an appropriate form (inquiry) depending on the type of loan. The following table describes the type of loans displayed on the LSUM form and the form to which users can detail.

Colleague displays the following attributes of the loan award:

Year. This is the academic year of the loan award.

Award Code. This is the code associated with the loan award.

Award Amount. This is the annual amount of the loan award.

Action Status. This is the annual action status associated with the loan award. If the action statuses for the award periods associated with the loan award are not the same, Colleague displays an asterisk.

Resp Status. For electronic loans (CL), this is the response status reported on the most recent Response File. The most recent Response File is the Response File with the latest date (not necessarily the Response File that was last imported).

Guarantee/EDE Amt. For electronic loans (CL), this is the guarantee amount reported on the most recent Response File. The most recent Response File is the Response File with the latest date (not necessarily the Response File that was last imported).

For Direct loans (DL), this is the loan amount reported in the Direct loan data most recently imported from EDEExpress. Colleague displays the loan amount imported from EDEExpress without regard to whether the loan was approved by the Loan Origination Center.

Types of Loans Displayed on the Loan Summary (LSUM) Form

CL "CommonLine" loans (FFELP and alternative)

Loan Disbursements (LDIS)

DL Direct loans Direct Loan Application (DLA) for 2002/2003 and earlier

Direct Loan Application (DLAN) for 2003/2004 and later

LN Awards belonging to a loan award category^a

Student Loan Information (SLI)

Loan Period - Start. This is the start date of the loan period associated with the loan award.

Loan Period - End. This is the end date of the loan period associated with the loan award.

Loan Type. The loan type code describes the type of loan award.

Xmit Fees. The transmitted amount plus fees for the student's loan.