

9.2 Parent PLUS Loan Refund Process

Purpose: Use this document as a reference for how to process a PLUS loan to a parent in ctcLink. This step occurs after the loan has been disbursed. PLUS loan to Parent refunds cannot be batch processed.

Audience: Student Financials staff/Financial Aid Staff.

 You must have at least one of these local college managed security roles:

- ZD SF Refunds
- ZZ SF Refunds

If you need assistance with the above security roles, please contact your local college supervisor or IT Admin to request role access.

Parent PLUS Loan Refund Process

Link the Sponsor to Student in SF

Navigation: NavBar > Navigator > Student Financials > Refunds > Designate Sponsor

1. The **Designate Sponsor** entry page displays.
2. Enter your **Business Unit**.
3. Select **Search**.

Designate Individual Sponsor

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

▼ Search Criteria

Business Unit 

Description begins with

Search

Clear

Basic Search 

Save Search Criteria

- The **Individual Sponsor** page displays.
- In the **ID** field, enter the Student ID number and then tab through.

Individual Sponsor

Business Unit WA030

ID 

Individual Sponsor

Find First  1 of 1  Last

Item Type
Account

Term
Item Amt

Balance

- The page becomes populated with the PLUS Loan data.
- In the **Sponsor ID** field, enter the Sponsor/Parent ID number and then tab through.
- Select the **Save** button to complete.

Individual Sponsor

Business Unit WA030

ID 201497107  Hernandez, Harley

Individual Sponsor

Find First  1 of 1  Last

Item Type PLUS Loan - Parent 1


Term SPRING 2020

Account TUT001-2203

Item Amt -1,596.00

Balance


-1,596.00

Sponsor ID 201182610  Evans, Ashley

Sponsor Org ID

Org Contact

 Save

 Return to Search

 Notify

Creating the Refund (Stage)

! You must have at least one of these local college managed security roles:

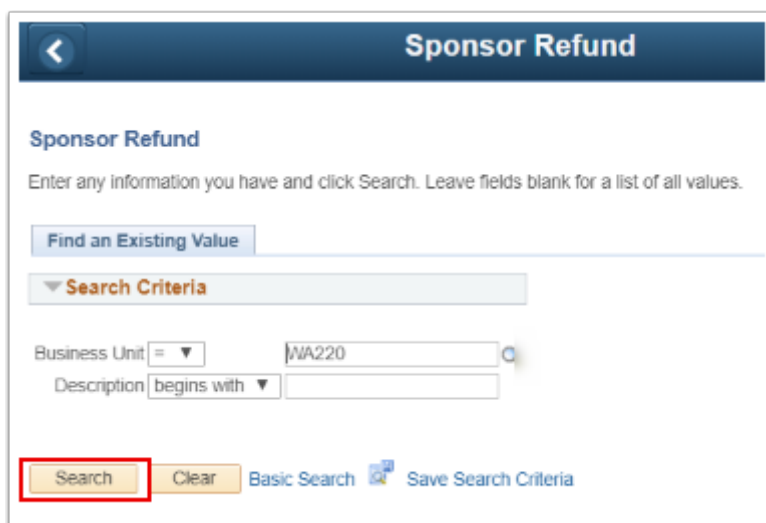
- ZZ SF Refunds

If you need assistance with the above security roles, please contact your local college supervisor or IT Admin to request role access.

! Student Financials must first post the funds that the Financial Aid Office disbursed prior to this step in the refunding process.

Navigation: NavBar > Navigator > Student Financials > Refunds > Sponsor Refund

1. The **Sponsor Refunds** page displays.
2. Enter your **Business Unit**.
3. Select **Search**.



4. The **Sponsor Refund** page displays.
5. In the **ID** field enter the **Sponsors ID** (Parents Empl ID) **and then tab out of the field** (the refund data will populate the page).
6. Enter Accounts Payable as the **Refund Method**.
7. In the **Refund Selection** group box select the checkbox next to each item to include in the refund. ctcLink automatically enters the total amount of the line item here. *To include only a portion of the line item in the refund, edit the amount.*
8. Select the **Format of "A"** = Automatic Check (AP printed check).
9. Select the **Refund Item Type** of **Student Refund**.

10. Select the **Address Type** of **Home**.
11. Select the arrow icon next to **View Refund Check** to view the an image of the information.
12. Select the **Post Refund** button to post the refund to the student's account.

< Online Refund
Sponsor Refund

Sponsor Refund

Business Unit WA220

ID

For ID

Academic Information Get Account

Refund Method Accounts Payable

Balance -4,323.55 Anticipated Aid

Refund Selection						Personalize Find	First 1 of 1 Last	
	Account Number	Term	Item Type	Item Amount	Balance	Refund Amount	Format	Details
<input checked="" type="checkbox"/>	TUT001-2020 SPRNG	2020 SPRNG	PLUS Loan-Parent 1-New Fee	-2,635.00	-2,635.00	2,635.000	A	

Refund Item Type Student Refund

Address HOME Format A

Event ID

Extra Amount

Post Refund

View Refund Check

Pay Two Thousand Six Hundred Thirty-Five and 0/100 Date 04/09/2020

Name JULIE [REDACTED] 2,635.00

417 [REDACTED] Apt 126

Spring Park

MN 5 [REDACTED]

After completing this page, be sure to complete the **AP Refund Interface** process.

Run the AP Refund Interface (Deliver)

You must have at least one of these local college managed security roles:

- ZD SF Refunds
- ZZ SF Refunds

If you need assistance with the above security roles, please contact your local college supervisor or IT Admin to request role access.

Navigation: Navbar > Navigator > Student Financials > Refunds > AP Direct Deposit > Create Refund Vouchers

1. The **Create Refund Voucher** run control ID search page displays.
2. Select the **Add a New Value** tab.

3. Enter **Run Control ID**.
4. Select **Add**.

< Manager Self Service Create Refund Voucher

Create Refund Voucher

Find an Existing Value Add a New Value

Run Control ID AP-Refund-Vouchers

Add

Find an Existing Value | Add a New Value

5. The **Create Refund Voucher** page displays.
6. Enter **Business Unit**.
7. For **Run Option**, it is recommended to run "Individual Only" separate from "Organization Only" or "Individual and Organization".
8. Select the **Run** button.
9. Please refer to the [Process Scheduling](#) QRG for further instructions.

< Manager Self Service Create Refund Vouchers

Create Refund Voucher

Run Control ID AP-Refund-Vouchers Report Manager Process Monitor Run

Parameters

Business Unit WA220 Tacoma Community College

Run Option: Individual Only

Save Notify Add Update/Display

← Sponsor Refund
Create Refund Vouchers

Process Scheduler Request

User ID 101008054
Run Control ID AP_PLUS_PARENT

Server Name

Recurrence

Time Zone

Run Date

Run Time

[Reset to Current Date/Time](#)

Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	SSF_AP_INTFC	SSF_AP_INTFC	Application Engine	Web	TXT	Distribution

OK
Cancel

Process List
1-1 of 1 | View All

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	38917469		Application Engine	SSF_AP_INTFC	101008054	04/09/2020 1:28:37PM PDT	Success	Posted	Details

10. Once the process list displays Success & Posted, select the **Details** link and then select the *Message Log* for confirmation of completion.

← Process List
Process Monitor

Message Log

Process

Instance: 38917469 Type: Application Engine

Name: SSF_AP_INTFC Description: SSF_AP_INTFC

1-8 of 8
View All

Severity	Log Time	Message Text	Explain
10	1:29:16PM	Entering Section: SSF_AP_INTFC of Application: MAIN	Explain
	1:29:25PM	Refund has been processed successfully for 201335316. A check will be issued through accounts payable (14846, 1013) (0,0)	Explain
10	1:29:34PM	Number of Direct Deposit Vouchers is 0.	Explain
10	1:29:34PM	Number of Check Vouchers is 1.	Explain
10	1:29:34PM	Total Number of Refunds Processed is 1.	Explain
10	1:29:34PM	Completed processing SSF_AP_INTFC App Engine program	Explain
	1:29:46PM	Published message with ID da486336-7aa0-11ea-b19b-97a8b9d83992 to create entry in folder GENERAL.	Explain
	1:29:46PM	Successfully posted generated files to the report repository	Explain

[Return](#)

11. Process complete.