

# Originate Direct Loans

**Purpose:** Use this document as a reference on how to originate any Direct Stafford or PLUS loans that have been awarded and have an award status of Accepted using ctLink.

**Audience:** Financial Aid staff.

The Direct Stafford or PLUS loans must have the loan program indicated as Direct Lending to be selected by this run control.

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

- ZD FA DL Prcs
- ZZ FA DL Prcs
- ZZ FA Direct Loan Processor

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

## Originate Direct Loans

### Loan Origination - Process Loans

**Navigation:** Financial Aid > Loans > Process Loans

1. The **Process Loans** search page displays.
2. Enter or add a new **Run Control ID**.
3. Select the **Search** button.
4. The **Loan Origination** page displays.
5. Enter the **Institution**.
6. Enter the **Aid Year** - use the Aid Year in which you are processing.
7. Enter the **Career**.
8. Select the **Adjustments** checkbox.
9. Select **Use Loan Program**. A drop-down menu field will display.
10. Select **Direct Lending**.
11. Unselect the **Population Selection** checkbox.
12. Select the **Run** button.

Loan Origination

Run Control ID WA140\_LOANS\_ORIG\_KF      Report Manager    Process Monitor    **Run**

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**Control Information**      Find    First    1 of 1    Last

\*Institution WA140    \*Aid Year 2024    \*Career UGRD

CL Orig Options Use Prom. Note

Use Loan Program    Direct Lending

Adjustments

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**Selection Criteria**

**Population Selection**

Population Selection

**Student Override**      Find | View All    First    1 of 1    Last

Student Override

**Last Name Range**

Last Name Range

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Save    Return to Search    Notify      Add    Update/Display

**!** The CL Orig Options (CommonLine origination options) field is used for CommonLine loans only.

12. The **Process Scheduler Request** page displays.
13. Select the **OK** button.
14. The **Loan Origination** page displays.
15. Make note of the **Process Instance** number.
16. Select the **Process Monitor** link.
17. The **Process Monitor** page displays.
18. From the Process List tab, select the **Refresh** button until the **Run Status** = Success and the **Distribution Status** = Posted.
19. When the process completes successfully, select the **Details** link.
20. The **Process Detail** page displays.
21. Select the **Message Log** link.
22. The **Message log** page displays.
23. Look for the "**Total Number of Loans Originated**" line. The value to the right should be greater than 1. You may notice a couple of loans next to the errors or incomplete or bad integrity lines. During normal business processing, these students will need adjustments in order to successfully originate.
24. The process to originate a direct loan is now complete.

## View Tutorial

The video below demonstrates the process actions described in the steps listed above. There is no audio included with this video. Select the play button to start the video.

## View Tutorial Via Panopto

View the external link to [Loan Origination - Process Loans](#). This link will open in a new tab/window.

## Loan Origination - Process Loan Dates

 Use the following Process Loan Dates steps below to update the Academic Year Start (or End Date for trailer colleges) to include or exclude summer values.

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

- ZD FA DL Prcs
- ZZ FA DL Prcs
- ZZ FA Direct Loan Processor

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

### Navigation: Financial Aid > Loans > Process Loan Dates

1. The **Process Loan Dates** display.
2. Enter or add a new **Run Control ID**.
3. Select the **Search** button.
4. The **Loan Date Update** page displays.
5. Enter the **Institution**.
6. Enter the **Aid Year** - use the Aid Year in which you are processing.

7. Select **PS Query** in the **Selection Tool** field. Select the appropriate query based on the college. The Edit Prompts link will appear.
8. Select the **Edit Prompts** link.
9. The **Query Prompts** pagelet displays.
10. Enter the **Institution**.
11. Enter the **Aid Year**.
12. Select the **OK** button.
13. The **Loan Date Update** page re-displays.
14. **Optional**- You may select the **Preview Selections** link to verify students are being selected for processing.
15. Select **UGRD** as the **Academic Career** value.
16. Enter **Disb Plan** numbers that are loan-specific. Loan specific Disb Plan numbers begin with the 30s, 40s and 50s.
17. Remove all disbursement plans containing any reference to "Summer" in the **Description** field.
18. For Header colleges: delete all dates in '**Loan Period Start**', '**Loan Period End**', and '**Acad Year End**' fields.
19. For Header colleges: update the '**Acad Year Start**' field with the correct value.
20. Once you have removed all non-loans and summer descriptions and duplicate values, the only remaining rows should be loan values in the 30s, 40s and 50s and the only date field to be populated is the **Acad Year Start**.
21. This step will update *non-summer* loan origination records to **exclude** the summer term from the **Academic Year Start** value.
22. Select the **Run** button.

-  The instructions for updating the academic year for Trailer colleges is as follows:
- Delete all dates in '**Loan Period Start**', '**Loan Period End**', and '**Acad Year Start**' field.
  - Update the '**Acad Year End**' field with the correct value.

This step will update *non-summer* loan origination records to **exclude** the summer term from the **Academic Year End** value.

23. The **Process Scheduler Request** page displays.
24. Select the **OK** button.
25. The **Loan Date Update** page displays.
26. Select the **Process Monitor** link.
27. Continue to select the **Refresh** button until the Run Status = **Success** and **Posted**.
28. When the process completes successfully, select the **Details** link.
29. The **Process Detail** page displays.
30. Select the **Message Log** link.
31. Verify that the status **successful** and **successfully** are displayed.
32. The process to update the academic year is now complete.

## View Tutorial

The video below demonstrates the process actions described in the steps listed above. There is no audio included with this video. Select the play button to start the video.

## View Tutorial Via Panopto

View the external link to [Loan Origination - Process Loan Dates](#). This link will open in a new tab/window.

## Loan Origination - Population Update

**i** Since updating the Academic Year Start/End dates do not allow the DL Outbound process to recognize the changes of loan dates to the loan origination record, Process Loans needs to be run again. However, in order the Process Loans program to recognize that a change has been made to the student's loan records, a flag needs to be "flipped" on the student's award page. To flip the flag, the Population Update process must be run.

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

- ZZ FA Pop Update

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

**Navigation: Set Up SACR > System Administration > Utilities > Population Update > Population Update Process**

1. The **Population Update Process** search page displays.
2. Enter a **New** or **Existing Run Control ID**.
3. Select the **Search** button.

4. The **Population Selection Update** page displays.
5. Enter the **Record (Table) Name: STDNT\_AWARDS - Student Awards**
6. Select the **Report Error Messages** radio button.
7. Select the appropriate **Selection Tool - PS Query**.
8. Select the appropriate **Query Name - CTC\_FA\_DL\_ACADYEAR\_POPUPD**.
9. Select **Edit Prompts**.
10. Select the **Institution**.
11. Select the **Aid Year** - use the Aid Year in which you are processing.
12. The **Query Prompts** pagelet displays.
13. Enter the **Institution** or lookup value.
14. Enter the **Aid Yr** or lookup value.
15. Select the **OK** button.
16. The **Population Selection Update** page displays.
17. Select **Preview Selection Results** to preview the student population being selected/ updated.
18. Select **Offer Activity** as the **Field Name**.
19. Select **Adjustment** as the **Field Value**.
20. Select the **Run** button.
21. The **Process Scheduler Request** page displays.
22. Select the **SCC\_POP\_UPD** check-box.
23. Select the **OK** button.
24. The **Population Selection Update** page displays.
25. Select the **Process Monitor**, and select the **Refresh** button until the status is run to **Success** and **Posted**.
26. Select the **Details** link.
27. Select the **Message Log** to review the details of this process.
28. The process to update the population is now complete.

## View Tutorial

The video below demonstrates the process actions described in the steps listed above. There is no audio included with this video. Select the play button to start the video.

## View Tutorial Via Panopto

View the external link to **Loan Origination - Population Update**. This link will open in a new tab/window.

# Loan Origination - Process Loans

 Once you have updated the loan dates, and run Summer Exclude/Include, you will need to re-originate the loan records to be sent out to COD.

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

- ZD FA DL Prcs
- ZZ FA DL Prcs
- ZZ FA Direct Loan Processor

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## Navigation: Financial Aid > Loans > Process Loans

1. The **Loan Origination** search page displays.
2. Enter the **Run Control ID**.
3. Select the **Search** button.
4. The **Loan Origination page** displays.
5. Enter the **Institution**.
6. Enter the **Aid Year** - use the Aid Year in which you are processing.
7. Enter the **Career (UGRD)**.
8. Select **CL Orig Options = Use Prom Note**
9. Select the **Adjustments** check box.
10. Select the **Use Loan Program** check box.
11. Select **Direct Lending** from the drop-down menu.
12. Use the **Student Override** section to originate loans for a single student, or list of students, if applicable.

 **IMPORTANT:** If running process in batch, ensure the Student Override box is unchecked. Leaving it checked with a blank ID field will produce no results.

13. Select the **Run** button.
14. The **Process Scheduler Request** page displays.
15. Select the **OK** button.

## Video Tutorial

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## View Tutorial Via Panopto

View the external link to [Process Loans](#). This link will open in a new tab/window.