


Awarding PLUS Loans

Purpose: Use this document as a reference on how to award a PLUS loan using ctcLink.

Audience: Financial Aid staff.

Assign Awards to a Student


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

- ZD FA Award Processing
- ZD FA Director
- ZZ FA Award Processing
- ZZ FA Award 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 > Awards > Award Processing > Assign Awards to a Student

1. The Award Entry search page displays.
2. Enter the **ID**.
3. Enter the **Academic Institution**.
4. Enter the **Aid Year**.
5. Select the **Search** button.
6. The Assign Awards to a Student page displays.
7. From the **Award** section, insert a **new row**.
8. Enter the Award Sequence **Nbr** if not auto-populated. If there other awards already present on the award screen, award the PLUS loan *last in the NUM sequence* so that the awarded amount applies to the remaining Financial Need and Cost of Attendance.
9. Enter the **Action** ('B' for Offered/Accepted).
10. Enter the appropriate **Plus Loan Item Type**.
11. Enter the **Amount**.
12. Select **Validate**.
13. Select **Post**.
15. Process complete - next, you will need to create a parent EMPL record, if none already exists.

 **Note:** The Department of Education conducts credit checks at the time the parent borrower applies for the PLUS loan. The COD response file (ex: crdlxxop) includes the results of the parent borrower's credit check information. The credit information will automatically be updated on the Manage Direct Loan Application page once the response file is successfully loaded into ctcLink.


Video Tutorial

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

Video Tutorial Via Panopto

View the external link to [Awarding a PLUS Loan - Assigning Awards to a Student](#). This link will open in a new tab/window.

Create Parent Borrower EMPL ID Record

 In the **Create Parent Borrower EMPL ID Record** step, you are creating a parent EMPL ID record. You must be very careful not to create a duplicate ID if one already exists for the parent. Perform a Search Match on the parent name, date of birth, and SSN before creating a new EMPL ID record. To run a Search Match, follow this QRG: [Running Search/Match \(Fluid\)](#)

The example below assumes the parent is brand new to ctcLink and needs an EMPL ID.

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

- ZC CC Personal Information
- ZC CC SOGI
- ZD CC Personal Information
- ZD CC SOGI
- ZD CC Super user
- ZZ CC Pers Info NID Update
- ZZ CC Personal Information
- ZZ CC SOGI

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

Navigation: Campus Community > Personal Information > Add/Update a Person

1. The **Add/Update a Person Search Criteria** page displays.
2. Select the **Add a New Value** tab, the NEW value will populate the ID field-- you are creating a new EMPLID for the parent.
3. Select the **Add** button.
4. On the **Biographical Details** tab, in the **Person Information** group box, enter the:
 - **First Name**
 - **Last Name**
 - **Date of Birth**
5. In the **Biographical History** group box, define the:
 - **Marital Status** - do not define as 'unknown'; it will cause relationship errors
 - **Sex** - do not define as 'unknown'; it will cause relationship errors

 **Tip!** Use the **Correct 20xx-20xx ISIR Records** page and review the parent information tab to determine the parent borrower's marital status

8. In the **National ID** group box, define the **National ID (SSN)**.
9. In the **Contact Information Group Box**, enter the:
 - **Phone number**
 - **Email address**
 - **Address** (Select the **Edit Address** link and enter, and select the **OK** button when done)
10. Select the **Citizenship** link and define the:
 - **Country**
 - **Citizenship Status** (Select the **OK** button when done)
11. Select the **Save** button back on the **Add/Update a Person** page. Note the newly assigned EMPL ID; you will use it in the next step.



Warning! If the SSN, Date of Birth, and Citizenship information is not populated/updated on the parent's EMPL record, COD will reject the loan transmission.

Video Tutorial

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Video Tutorial Via Panopto

View the external link to [Awarding a PLUS Loan - Create Parent Borrower EMPL ID Record](#). This link will open in a new tab/window.

Establishing a Student/Parent Relationship



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

- ZC CC Personal Information
- ZD CC Personal Information
- ZD CC Super user
- ZZ CC Pers Info NID Update
- ZZ CC Personal Information

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

Navigation: Campus Community > Personal Information > Biographical > Relationships > Relationships

1. The Relationships search page displays.
2. Select the **Add a New Value** tab.
3. Enter **ID** that belongs to the student (not the parent).


4. Select **Add** button.
5. The Relationships page displays.
6. Enter the **Effective Date**, which is usually the current date.
7. Select the **Active** list item on the **Status** row.
8. Enter the **Related ID**, which is the parent's ID (not the student's) - Bio/demo information for the parent should then auto-populate in the fields below (ex: Name, Marital Status, National ID, etc).
9. Select the appropriate **Relationship** value from the drop-down menu.
10. For the **Guardian** value, select **Parent Guardian** from the drop-down menu. Do not leave this undefined.
11. Select the **Relationship Address** tab.
12. The Relationship Address tab displays.
13. Verify mailing address under the Related ID (or Name) section.
14. Verify the email address is populated for the parent under the **Related ID** (or Name) section.
15. Select the **Save** button.
16. The process to establish a student/parent relationship is now complete. The parent record can now be added to the student's PLUS loan record.

Video Tutorial

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

Video Tutorial Via Panopto

View the external link to [Awarding PLUS Loans - Establishing a Student/Parent Relationship](#). This link will open in a new tab/window.


 **The next step** is to originate the loan--simply originate a single Direct loan--which will create the shell for the Manage Direct Loan Application (MDLA) page.

Once the shell for the MDLA page is built, **the following step** is to *link* the parent to the PLUS loan record.

To follow instructions to originate a loan, please select this QRG:

https://ctclinkreferencecenter.ctclink.us/m/FA_loans/l/1005682-9-2-originate-direct-loans

Link Parent to PLUS Loan Record


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

- ZD FA DL Mgmt
- ZD FA Director
- ZZ FA DL Mgmt
- 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 > Direct Lending Management > Manage Direct Loan Application

1. The **Direct Loan Application** page displays. Complete the following fields:
 1. **EMPL ID**
 2. **Academic Institution**
 3. **Aid Year**
2. Select the **Search** button.
3. The Manage Direct Loan Application page displays.
4. In the **Application Bio/Demo** tab, enter the parent's EMPL ID into the **Borrower ID** field.

 If you select the Lookup Tool next to the Borrower ID field, the parent should be the only available option from which to select; because you have already established the relationship in Campus Community.

5. Next, set the **Loan Refund Indicator**, with either **Borrower**, or **Student**.
6. Finally, select the **Save** button.



If the parent borrower has indicated on the PLUS loan application that they want the refund to go back to the parent, select "Borrower" as your Loan Refund Indicator.

If the borrower has indicated they want the refund to go to the student, select "Student" in your Loan Refund Indicator.

***This is a very important step that impacts to whom Student Financials issues the PLUS refund based on the borrower's preference on the COD PLUS Loan Application.*



Next, run Process Loans again so it picks up the record with the PLUS borrower linked to the loan record.

8. You have successfully assigned an award to a student, established a student/parent relationship, and linked a parent to a PLUS loan record.
9. Processes complete.

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