



**Electronic Access Conference**  
*emagine*  
2001

**Student Financial Assistance**

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THE U.S. Department of  
**EDUCATION**



# People and Loan Information Review

- People and Loan searches separated
- From Person Detail:
  - Change demographic information
  - View Local Address
- From Loan Detail:
  - Get to demographic information
  - Make changes to loan information online
  - Make new anticipated disbursements



# *Anticipated Disbursements*

- **Change Anticipated Disbursements**
  - Does not change any actual disbursement information
  - If actual disbursements need to be changed; then school will need to send through batch



# Making Changes

- Ability to change:
  - Loans
    - Academic Year
    - Loan Period
    - Loan Amount Approved
    - Dependency Status
    - Heal Indicator
    - College Year
    - Disclosure Print Indicator
    - P-Note Print Indicator
  - Anticipated Disbursements
    - Date
    - Gross Amount
- Changes made via the Web are not acknowledged back to schools
- Changes are edited same as through batch
- Change is displayed immediately
- Only change on field at a time



# *Audit History*

- Users can see what online changes have been made to borrower information
- Search by:
  - SSN
  - Functional Area
    - Loan
    - People
    - Credit Check
    - Disbursement



# *View Entrance Counseling Results*

- Search by:
  - Date Range
  - Social Security Number
- Change for 2002/2003:
  - Schools can choose if they would like to receive results in message class and how often



# *Loan File Rebuild*

- SFAO can choose to have data restores sent by:
  - Loan ID
  - Program Year
  - Date Range
  - Social Security Number and Date of Birth
- When pending:
  - Can change information
  - Delete from processing



## ***MPN Review***

- Check to see if student has an MPN on file
- Displays:
  - Loan Year
  - Status
  - Date of MPN
  - Expiration Date
- In July 2001, there will be an indicator for electronic versus paper note



# *User Registration*

- More roles to choose from:
  - SFAO
  - AFAO view or update
  - CAFAO view or update
  - Credit Check
  - Entrance Counseling
  - Entrance/Servicing
  - School Servicing



# Maintain Batch Reports

- Anticipated Disb Listing
  - Disable
  - Specify format
- Actual Disb Roster
  - Specify format
- 30 Day Warning
  - Disable
  - Specify format
- Inactive Loans
  - Disable
  - Specify format
- SSN/Name/DOB
  - Disable
  - Specify format
- Duplicate Borrower
  - Disable
  - Specify format
- Pending SSN Change over 45 Days
  - Disable
  - Specify format
- DLSAS
  - Disable (only if program year is closed)
  - Specify format
- Disb Activity Not Yet Booked in Servicing
  - Disable
  - Specify format
- 732
  - Disable (only if program year is closed)
  - Specify format



# Signing Up for electronic MPN

- School determines if this process is used at all
  - SFAO completes the school options screen on LO Online web site
  - Can add additional e-mail text to standard message to go to students who provide e-mail addresses
  - Messages are limited to 256 characters
- If E-Signature is used:
  - Allow all borrowers to complete an E-Note
  - Allow only borrowers with a valid LO record to complete an E-Note



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# QUESTIONS?

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Session 21-12