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Adjusting Loan Amounts

Concept

When Commonline loans have been awarded to a student, the amounts can be adjusted up to the point where the loan records are processed for transmission to the lender or servicer. Once the loans are in transmitted status, no adjustments can be made until a response has been received from the lender and loaded. Once the response has been loaded, adjustments can be made and the change records can be transmitted to the lender.

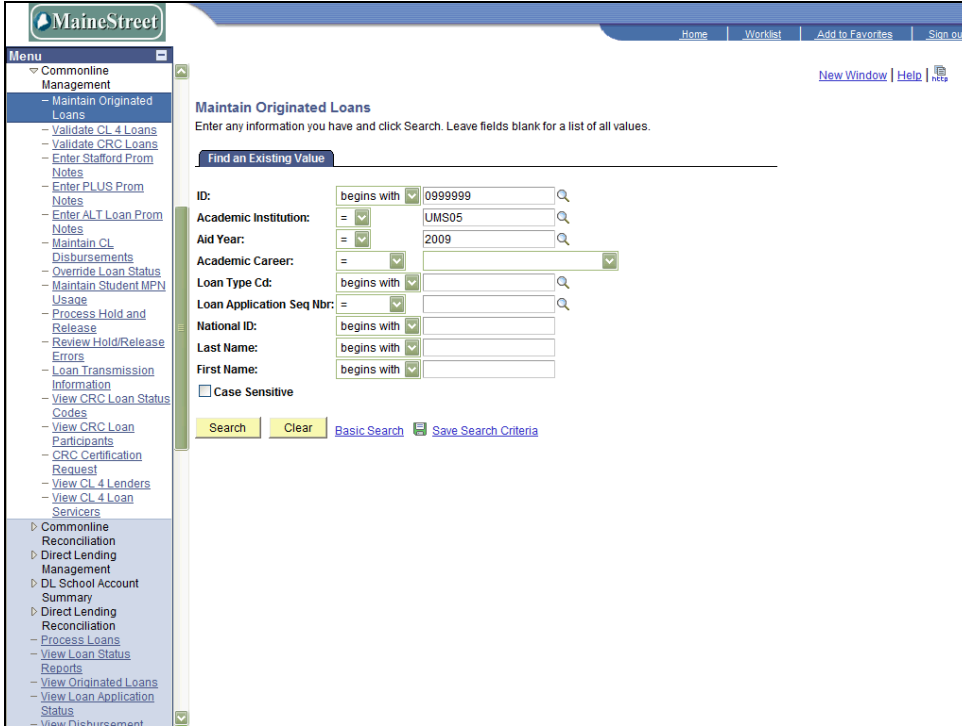
Prior to disbursement total loan amounts may be adjusted but must remain evenly split across terms. Once a disbursement is made, however, you can use a custom split to change future disbursement amounts. For example, a student is awarded a subsidized Stafford loan and the funds are disbursed for fall term. At that point, the student is awarded a scholarship, and his/her sub loan must be reduced. The disbursement amount for the spring term can be adjusted accordingly without affecting the funds already disbursed.

In this topic, we see how to adjust loans before disbursement and after disbursement.

Procedure



Step	Action
1.	When adjusting a loan prior to disbursement, the first step is to review the status of the student's Stafford loan. Navigate: Financial Aid > Loans > Commonline Management > Maintain Originated Loans.



The screenshot shows the 'MaineStreet' web application interface. The main heading is 'Maintain Originated Loans'. Below the heading, there is a search instruction: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' A search bar is present with the text 'Find an Existing Value'. Below the search bar, there are several search criteria fields:

- ID:** begins with [0999999]
- Academic Institution:** [UMS05]
- Aid Year:** [2009]
- Academic Career:** []
- Loan Type Cd:** begins with []
- Loan Application Seq Nbr:** []
- National ID:** begins with []
- Last Name:** begins with []
- First Name:** begins with []

 There is a checkbox for 'Case Sensitive' which is currently unchecked. At the bottom of the search criteria, there are buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'. On the left side, there is a 'Menu' with various navigation options under 'Commonline Management' and 'Commonline Reconciliation'.

Step	Action
2.	Enter the Institution, Aid Year and search criteria to identify the student. Click the Search button. <div style="border: 1px solid black; padding: 2px; display: inline-block; margin-top: 5px;">Search</div>

Process Document

Financial Aid: Adjusting Loan Amounts-073008



MaineStreet

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[Loan Origination 1](#) | [Loan Origination 2](#) | [Loan Origination 3](#) | [Loan Validation](#) |

ID: 0999999 **Footram,Hiram Xeves** **Institution:** UMS05
Career: UGRD **Undergraduate** **Aid Year:** 2009
Loan Type: STF1 **FFEL Stafford Combo** **Appl Seq:** 1 [Loan Status Summary](#)

Borrower Information

Borrower ID: 0999999 **Hiram Xeves Footram**
Borrower SSN: 999-99-9999 [Loan Demographic](#)
Borrower Date of Birth: 01/01/1990 [Borr Bio/Demo Data](#)
Driver's License #: 7777777 **State:** ME [Select Ref/Csgn](#)
Borrower Requested Amt: \$7,277.00

Parent/Alternative Loan


Loan Refund Indicator: [Stdnt Bio/Demo Data](#)
[Related IDs](#)

Process

Loan Destination Nbr: **CommonLine Loan Version:**
Processing Level:
Servicer OPEID: ELM Resources 000003 0000
Lender OPEID: AMS through FNB Sioux Falls 500200 0000
Guarantor OPEID: HEMAR Insurance Corp. of Ameri 002

[Loan Origination 1](#) | [Loan Origination 2](#) | [Loan Origination 3](#) | [Loan Validation](#) | [Loan Orig Status](#)

Step	Action
3.	Look at the last tab on the page. Click the Show following tabs button.



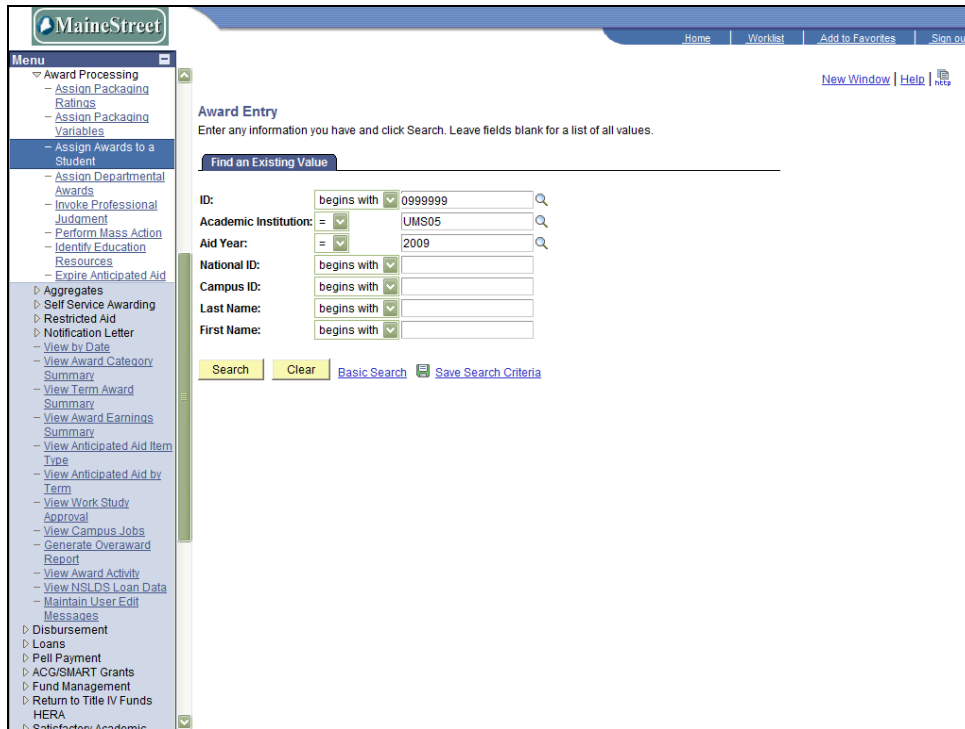
The screenshot shows the 'MaineStreet' web application interface. The left sidebar contains a 'Menu' with various options like 'Commonline Management', 'Direct Lending Management', and 'DL School Account Summary'. The main content area is titled 'Loan Origination 2' and displays the following information:

- ID:** 0999999
- Career:** UGRD
- Loan Type:** STF1
- Institution:** Foorfram, Hiram Xerxes
- Aid Year:** 2009
- Apppl Seq:** 1
- Borrower Information:**
 - Borrower ID: 0999999
 - Borrower SSN: 999-99-9999
 - Borrower Date of Birth: 01/01/1990
 - Driver's License #: 7777777
 - Borrower Requested Amt: \$7,277.00
- Parent/Alternative Loan:**
 - Loan Refund Indicator: Borrower
- Process:**
 - Loan Destination Nbr: 137
 - Processing Level: GP
 - Servicer OPEID: ELM Resources
 - Lender OPEID: AMS through FNB Sioux Falls
 - Guarantor OPEID: HEMAR Insurance Corp. of Ameri

Step	Action
4.	Click the Loan Orig Status tab. Loan Orig Status
5.	Notice that the loan in this example has been transmitted and acknowledged by the lender. You can adjust loan amounts either before the loan record is in transmitted status, or after the record is acknowledged. You cannot make adjustments while the loan is in transmitted status.
6.	Having checked the status of the loan, navigate to the awards page. Navigate: Financial Aid > Awards > Award Processing > Assign Awards to a Student.

Process Document

Financial Aid: Adjusting Loan Amounts-073008

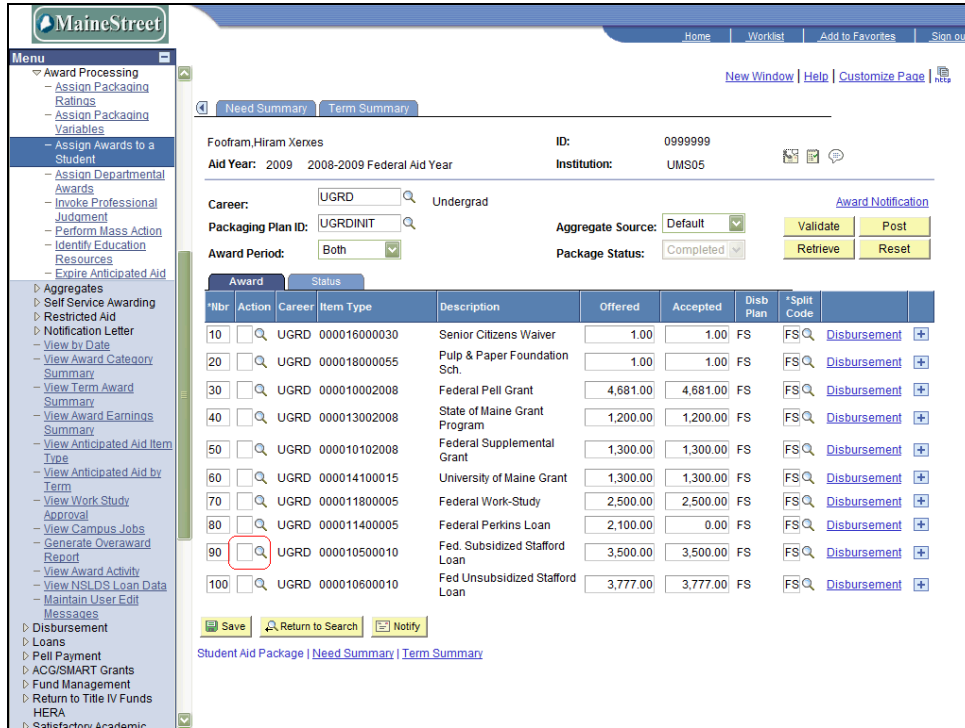


The screenshot shows the 'Award Entry' page in the MaineStreet system. The left sidebar contains a 'Menu' with various options like 'Award Processing', 'Assign Packaging', and 'Assign Awards to a Student'. The main content area is titled 'Award Entry' and includes a search form with the following fields:

- ID:** begins with 0999999
- Academic Institution:** UMS05
- Aid Year:** 2009
- National ID:** begins with
- Campus ID:** begins with
- Last Name:** begins with
- First Name:** begins with

Buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria' are located below the form. A 'Find an Existing Value' link is also present above the search fields.

Step	Action
7.	Search for the student. Click the Search button.



MaineStreet

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Need Summary | Term Summary

Footram, Hiram Xerxes ID: 0999999
Aid Year: 2009 2008-2009 Federal Aid Year Institution: UMS05

Career: UGRD Undergrad
Packaging Plan ID: UGRDINIT Aggregate Source: Default
Award Period: Both Package Status: Completed

Nbr	Action	Career	Item Type	Description	Offered	Accepted	Disb Plan	Split Code	
10		UGRD	000016000030	Senior Citizens Waiver	1.00	1.00	FS	FS	Disbursement
20		UGRD	000018000055	Pulp & Paper Foundation Sch.	1.00	1.00	FS	FS	Disbursement
30		UGRD	000010002008	Federal Pell Grant	4,681.00	4,681.00	FS	FS	Disbursement
40		UGRD	000013002008	State of Maine Grant Program	1,200.00	1,200.00	FS	FS	Disbursement
50		UGRD	000010102008	Federal Supplemental Grant	1,300.00	1,300.00	FS	FS	Disbursement
60		UGRD	000014100015	University of Maine Grant	1,300.00	1,300.00	FS	FS	Disbursement
70		UGRD	000011800005	Federal Work-Study	2,500.00	2,500.00	FS	FS	Disbursement
80		UGRD	000011400005	Federal Perkins Loan	2,100.00	0.00	FS	FS	Disbursement
90		UGRD	000010500010	Fed. Subsidized Stafford Loan	3,500.00	3,500.00	FS	FS	Disbursement
100		UGRD	000010600010	Fed Unsubsidized Stafford Loan	3,777.00	3,777.00	FS	FS	Disbursement

Save | Return to Search | Notify

Student Aid Package | Need Summary | Term Summary

Step	Action
8.	To adjust the Subsidized Stafford loan amount, you must enter the "B" action code in the Action field on that line.
9.	The B action code opens the Offered amount field for editing. Enter the new amount in the Offered field and press the Tab key to copy the new amount into the Accepted field.

Process Document

Financial Aid: Adjusting Loan Amounts-073008

MaineStreet

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Need Summary | Term Summary

Footram,Hiram Xerxes ID: 0999999
 Aid Year: 2009 2008-2009 Federal Aid Year Institution: UMS05

Career: UGRD Undergrad
 Packaging Plan ID: UGRDINIT
 Award Period: Both
 Aggregate Source: Default
 Package Status: Completed

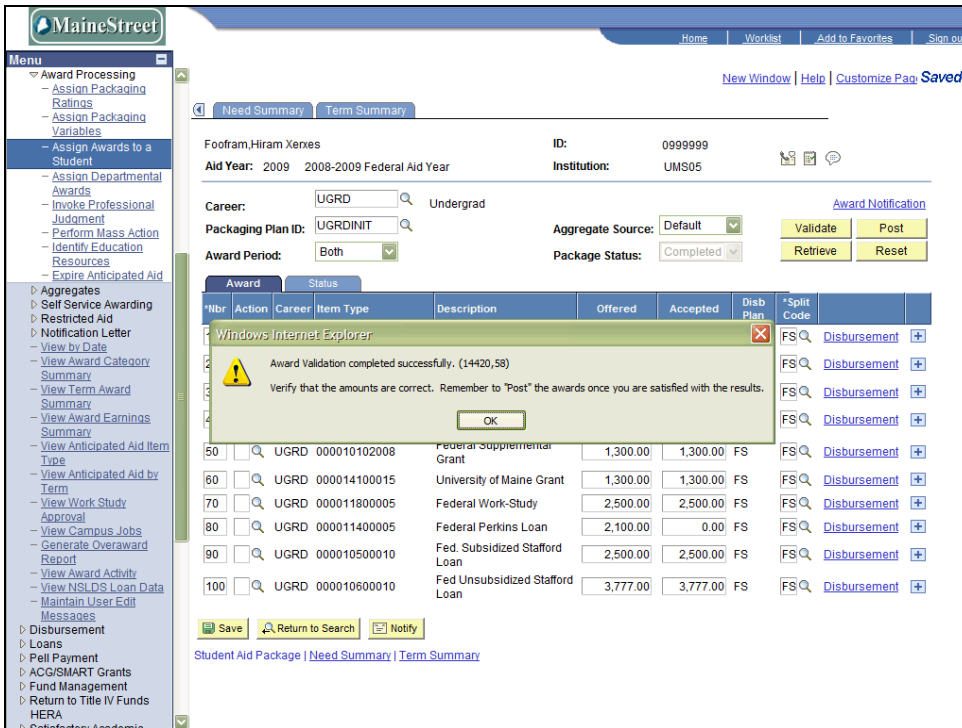
Validate Post
 Retrieve Reset

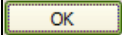
Award	Status	Nbr	Action	Career	Item Type	Description	Offered	Accepted	Disb Plan	*Split Code	
10				UGRD	000016000030	Senior Citizens Waiver	1.00	1.00	FS	FS	Disbursement
20				UGRD	000018000055	Pulp & Paper Foundation Sch.	1.00	1.00	FS	FS	Disbursement
30				UGRD	000010002008	Federal Pell Grant	4,681.00	4,681.00	FS	FS	Disbursement
40				UGRD	000013002008	State of Maine Grant Program	1,200.00	1,200.00	FS	FS	Disbursement
50				UGRD	000010102008	Federal Supplemental Grant	1,300.00	1,300.00	FS	FS	Disbursement
60				UGRD	000014100015	University of Maine Grant	1,300.00	1,300.00	FS	FS	Disbursement
70				UGRD	000011800005	Federal Work-Study	2,500.00	2,500.00	FS	FS	Disbursement
80				UGRD	000011400005	Federal Perkins Loan	2,100.00	0.00	FS	FS	Disbursement
90	B			UGRD	000010500010	Fed. Subsidized Stafford Loan	2,500.00	2,500.00	FS	FS	Disbursement
100				UGRD	000010600010	Fed Unsubsidized Stafford Loan	3,777.00	3,777.00	FS	FS	Disbursement

Save Return to Search Notify

Student Aid Package | Need Summary | Term Summary

Step	Action
10.	Click the Validate button.



Step	Action
11.	Click the OK button. <div style="text-align: center; margin-top: 10px;">  </div>

Process Document

Financial Aid: Adjusting Loan Amounts-073008

MaineStreet

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Need Summary | Term Summary

Foofram,Hiram Xerxes ID: 0999999
 Aid Year: 2009 2008-2009 Federal Aid Year Institution: UMS05

Career: UGRD Undergrad
 Packaging Plan ID: UGRDINIT
 Award Period: Both
 Aggregate Source: Default
 Package Status: Completed

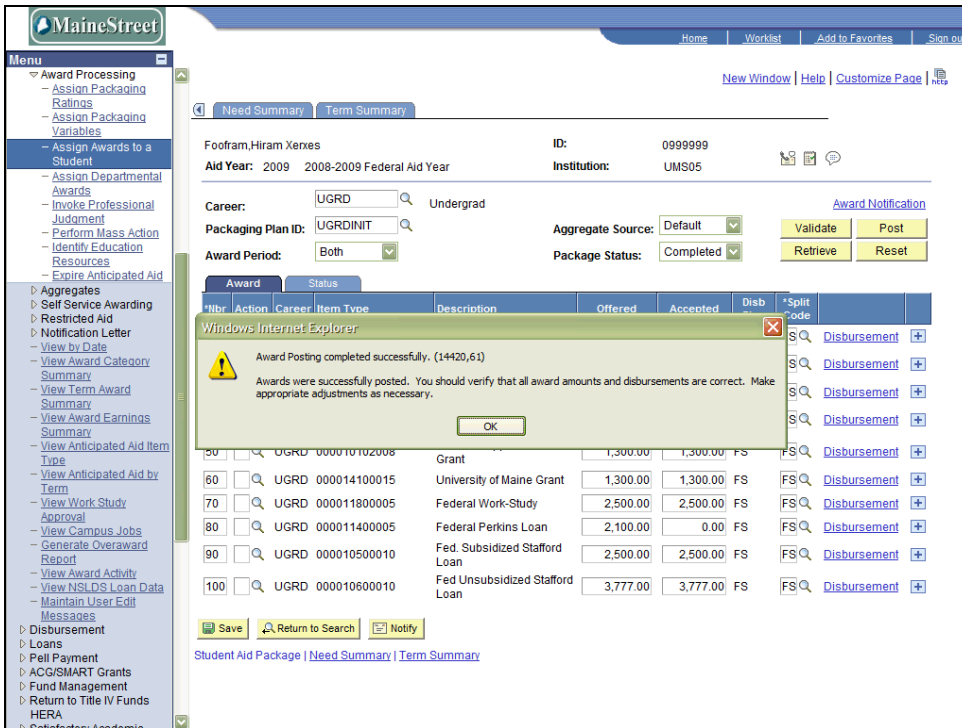
Validate Post
 Retrieve Reset

Award	Status	#	Action	Career	Item Type	Description	Offered	Accepted	Disb Plan	*Split Code	
10				UGRD	000016000030	Senior Citizens Waiver	1.00	1.00	FS	FS	Disbursement
20				UGRD	000018000055	Pulp & Paper Foundation Sch.	1.00	1.00	FS	FS	Disbursement
30				UGRD	000010002008	Federal Pell Grant	4,681.00	4,681.00	FS	FS	Disbursement
40				UGRD	000013002008	State of Maine Grant Program	1,200.00	1,200.00	FS	FS	Disbursement
50				UGRD	000010102008	Federal Supplemental Grant	1,300.00	1,300.00	FS	FS	Disbursement
60				UGRD	000014100015	University of Maine Grant	1,300.00	1,300.00	FS	FS	Disbursement
70				UGRD	000011800005	Federal Work-Study	2,500.00	2,500.00	FS	FS	Disbursement
80				UGRD	000011400005	Federal Perkins Loan	2,100.00	0.00	FS	FS	Disbursement
90				UGRD	000010500010	Fed. Subsidized Stafford Loan	2,500.00	2,500.00	FS	FS	Disbursement
100				UGRD	000010600010	Fed Unsubsidized Stafford Loan	3,777.00	3,777.00	FS	FS	Disbursement

Save Return to Search Notify

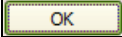
Student Aid Package | Need Summary | Term Summary

Step	Action
12.	Click the Post button.



The screenshot shows the MaineStreet financial aid system interface. The main content area displays student information for 'Foofram, Hiram Xerxes' and a table of financial aid items. A 'Windows Internet Explorer' dialog box is overlaid on the table, displaying a success message: 'Award Posting completed successfully. (14420,61) Awards were successfully posted. You should verify that all award amounts and disbursements are correct. Make appropriate adjustments as necessary.' with an 'OK' button.

ID	Action	Career	Item Type	Description	Offered	Accepted	Disb	Split Code	Disbursement
50	<input type="checkbox"/>	UGRD	000010102008	Grant	1,300.00	1,300.00	FS	FS	Disbursement
60	<input type="checkbox"/>	UGRD	000014100015	University of Maine Grant	1,300.00	1,300.00	FS	FS	Disbursement
70	<input type="checkbox"/>	UGRD	000011800005	Federal Work-Study	2,500.00	2,500.00	FS	FS	Disbursement
80	<input type="checkbox"/>	UGRD	000011400005	Federal Perkins Loan	2,100.00	0.00	FS	FS	Disbursement
90	<input type="checkbox"/>	UGRD	000010500010	Fed. Subsidized Stafford Loan	2,500.00	2,500.00	FS	FS	Disbursement
100	<input type="checkbox"/>	UGRD	000010600010	Fed Unsubsidized Stafford Loan	3,777.00	3,777.00	FS	FS	Disbursement

Step	Action
13.	Click the OK button. 

Process Document

Financial Aid: Adjusting Loan Amounts-073008



MaineStreet

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Need Summary | Term Summary

Foofram,Hiram Xerxes ID: 0999999
 Aid Year: 2009 2008-2009 Federal Aid Year Institution: UMS05

Career: UGRD Undergrad
 Packaging Plan ID: UGRDINIT
 Award Period: Both

Aggregate Source: Default
 Package Status: Completed

Validate Post
 Retrieve Reset

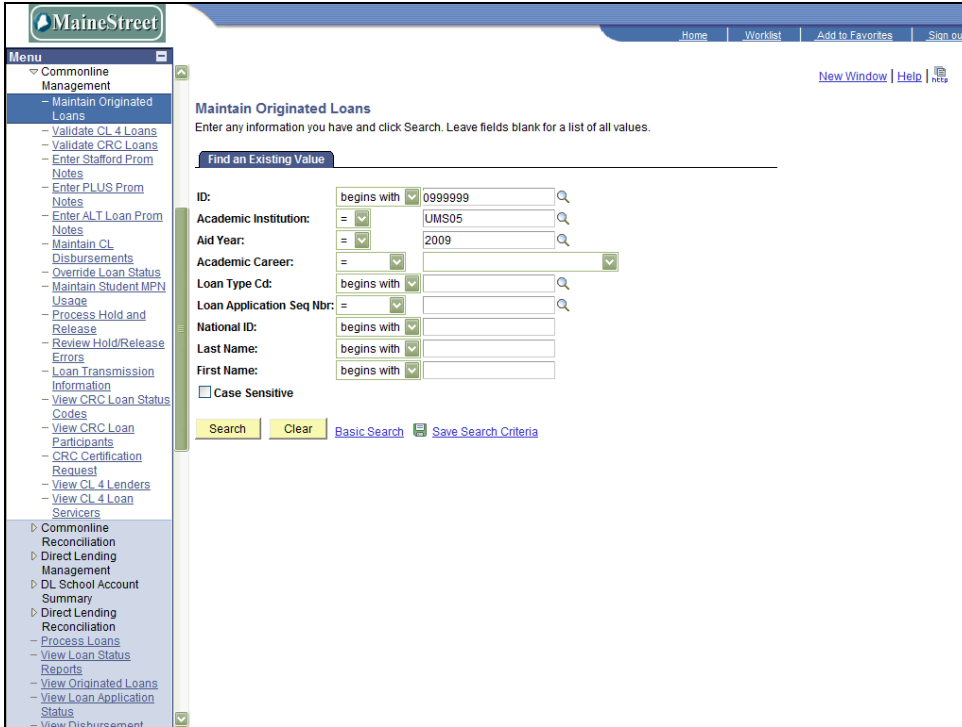
Award	Status	#	Action	Career	Item Type	Description	Offered	Accepted	Disb Plan	*Split Code	
10		Q	UGRD	000016000030	Senior Citizens Waiver	1.00	1.00	FS	FS	Q	Disbursement +
20		Q	UGRD	000018000055	Pulp & Paper Foundation Sch.	1.00	1.00	FS	FS	Q	Disbursement +
30		Q	UGRD	000010002008	Federal Pell Grant	4,681.00	4,681.00	FS	FS	Q	Disbursement +
40		Q	UGRD	000013002008	State of Maine Grant Program	1,200.00	1,200.00	FS	FS	Q	Disbursement +
50		Q	UGRD	000010102008	Federal Supplemental Grant	1,300.00	1,300.00	FS	FS	Q	Disbursement +
60		Q	UGRD	000014100015	University of Maine Grant	1,300.00	1,300.00	FS	FS	Q	Disbursement +
70		Q	UGRD	000011800005	Federal Work-Study	2,500.00	2,500.00	FS	FS	Q	Disbursement +
80		Q	UGRD	000011400005	Federal Perkins Loan	2,100.00	0.00	FS	FS	Q	Disbursement +
90		Q	UGRD	000010500010	Fed. Subsidized Stafford Loan	2,500.00	2,500.00	FS	FS	Q	Disbursement +
100		Q	UGRD	000010600010	Fed Unsubsidized Stafford Loan	3,777.00	3,777.00	FS	FS	Q	Disbursement +

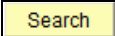
Save Return to Search Notify

Student Aid Package | Need Summary | Term Summary

Step	Action
14.	The adjustment is complete. To view the effect on disbursement, click the Disbursement link on that row. Disbursement
15.	The new award amount is split evenly between the two academic terms. To complete the processing of this loan, you would originate it (with the Adjustments checkbox selected), validate it, process the loan record and create an outbound file to send the changed record to the lender. For details, please see the topics on loan origination, validation and generation of an outbound file.

Step	Action
16.	<p>Now we will see how to change the loan amount after funds have been disbursed.</p> <p>For example, a student received the fall disbursement for his/her subsidized loan, and then later was awarded a scholarship, necessitating an adjustment in the loan amount. This process allows the spring disbursement amount to be adjusted, leaving the funds already disbursed unchanged.</p> <p>As before, the first step is to review the loan status. Navigate: Financial Aid > Loans > Commonline Management > Maintain Originated Loans.</p>



Step	Action
17.	<p>Search for the student. Click the Search button.</p> <div style="text-align: center; margin-top: 10px;">  </div>

Process Document

Financial Aid: Adjusting Loan Amounts-073008



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Menu

- Commonline Management
 - Maintain Originated Loans
 - Validate CL 4 Loans
 - Validate CRC Loans
 - Enter Stafford Prom Notes
 - Enter PLUS Prom Notes
 - Enter A/T/L Loan Prom Notes
 - Maintain CL Disbursements
 - Override Loan Status
 - Maintain Student MPN Usage
 - Process Hold and Release
 - Review Hold/Release Errors
 - Loan Transmission Information
 - View CRC Loan Status Codes
 - View CRC Loan Participants
 - CRC Certification Request
 - View CL 4 Lenders
 - View CL 4 Loan Services
 - Commonline Reconciliation
 - Direct Lending Management
 - DL School Account Summary
 - Direct Lending Reconciliation
 - Process Loans
 - View Loan Status Reports
 - View Originated Loans
 - View Loan Application Status
 - View Disbursement

Loan Origination 2 | Loan Origination 3 | Loan Validation | Loan Orig Status

ID: 0999999 Fofram,Hiram Xerxes Institution: UMS05
 Career: UGRD Undergraduate Aid Year: 2009
 Loan Type: STF 1 FFEL Stafford Combo Appl Seq: 1 [Loan Status Summary](#)

Borrower Information

Borrower ID: 0616576 Hiram Xerxes Fofram
 Borrower SSN: 999-99-9999 [Loan Demographic](#)
 Borrower Date of Birth: 01/01/1990 [Borr Bio/Demo Data](#)
 Driver's License #: 7777777 State: ME Select Ref/Csgn
 Borrower Requested Amt: \$7,277.00

Parent/Alternative Loan

Loan Refund Indicator: Borrower [Stdnt Bio/Demo Data](#)
[Related IDs](#)

Process

Loan Destination Nbr: 137 AMS through FNB Sioux Falls CommonLine Loan Version: CL4
 Processing Level: GP Guarantee and Print Appl
 Servicer OPEID: ELM Resources 000003 0000
 Lender OPEID: AMS through FNB Sioux Falls 500200 0000
 Guarantor OPEID: HEMAR Insurance Corp. of Ameri 002

Save Return to Search Notify

[Loan Origination 1](#) | [Loan Origination 2](#) | [Loan Origination 3](#) | [Loan Validation](#) | [Loan Orig Status](#)

Step	Action
18.	Click the Loan Orig Status tab. Loan Orig Status

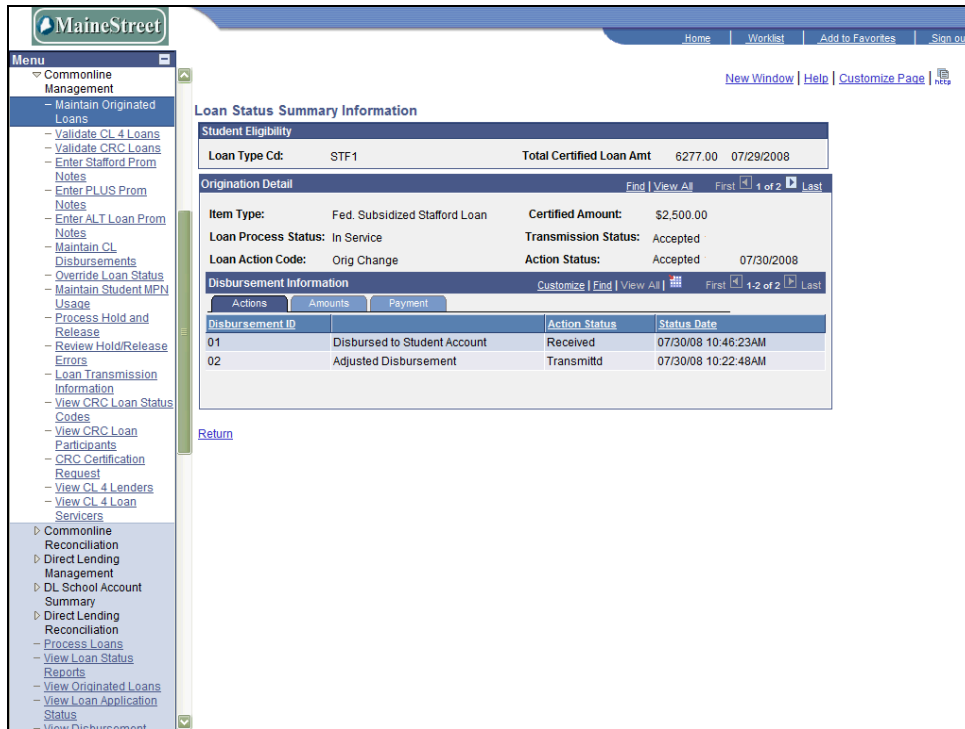


The screenshot shows the 'MaineStreet' web application interface. The left sidebar contains a 'Menu' with various options like 'Commonline Management', 'Loan Origination', and 'Direct Lending'. The main content area displays loan details for a student with ID 0999999, name Foofram, Hiram Xerxes, at institution UMS05. The loan type is STF1 (FFEL Stafford Combo) with an aid year of 2009. The 'Origination Detail' table shows two rows: one for 'ORIGINATED' with an offer amount of \$2500.00 and an 'Ln Proc Stat' of 'In Service', and another for 'ACKNOWLEDGED' with an offer amount of \$2500.00 and an 'Orig Trans Stat' of 'Accepted'. Below this is a 'Disbursement' table with two rows, each for \$1250.00. At the bottom, there are buttons for 'Save', 'Return to Search', and 'Notify', and a link for 'Loan Status Summary'.

Step	Action
19.	<p>Notice that the Orig trans Stat is "Accepted" - in other words, an acknowledgement has been received from the lender. You cannot make an adjustment if this status is "Trans."</p> <p>Click the Loan Status Summary link.</p> <p>Loan Status Summary</p>

Process Document

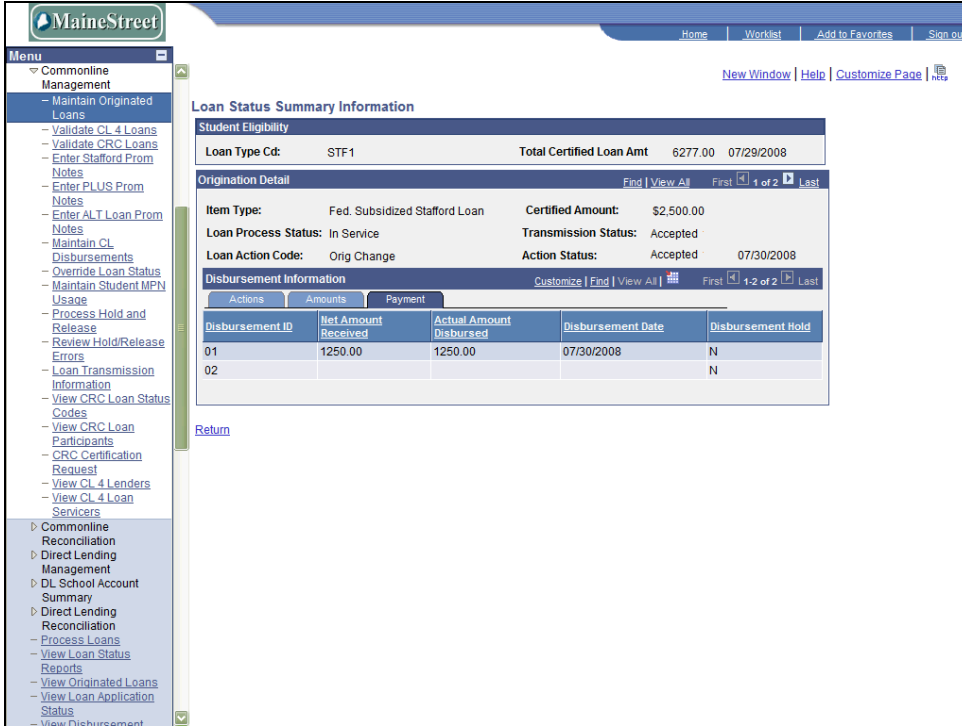
Financial Aid: Adjusting Loan Amounts-073008



The screenshot shows the MaineStreet web application interface. On the left is a navigation menu with categories like 'Commonline Management' and 'Commonline Reconciliation'. The main content area displays 'Loan Status Summary Information' for a specific loan. It includes sections for Student Eligibility, Origination Detail, and Disbursement Information. The Disbursement Information section has tabs for 'Actions', 'Amounts', and 'Payment'. A table below shows two disbursement entries: one for 'Disbursed to Student Account' and another for 'Adjusted Disbursement'.

Loan Status Summary Information			
Student Eligibility			
Loan Type Cd:	STF1	Total Certified Loan Amt	6277.00 07/29/2008
Origination Detail			
Item Type:	Fed. Subsidized Stafford Loan	Certified Amount:	\$2,500.00
Loan Process Status:	In Service	Transmission Status:	Accepted
Loan Action Code:	Orig Change	Action Status:	Accepted 07/30/2008
Disbursement Information			
Actions		Amounts	Payment
Disbursement ID	Amounts	Action Status	Status Date
01	Disbursed to Student Account	Received	07/30/08 10:46:23AM
02	Adjusted Disbursement	Transmittd	07/30/08 10:22:48AM

Step	Action
20.	Note that funds have been disbursed. Click the Payment tab. <div style="border: 1px solid black; padding: 2px; display: inline-block;">Payment</div>



The screenshot shows the 'Loan Status Summary Information' page in the MaineStreet system. The page includes a navigation menu on the left and a main content area with several sections:

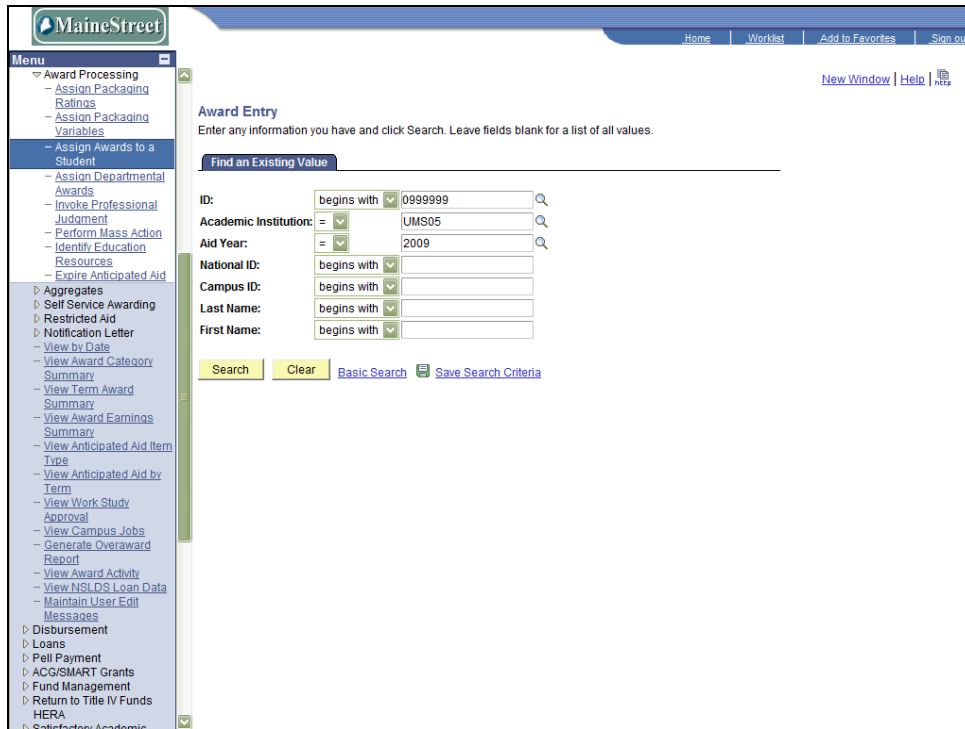
- Student Eligibility:** Loan Type Cdt: STF1, Total Certified Loan Amt: 6277.00, 07/29/2008
- Origination Detail:** Item Type: Fed. Subsidized Stafford Loan, Certified Amount: \$2,500.00, Loan Process Status: In Service, Transmission Status: Accepted, Loan Action Code: Orig Change, Action Status: Accepted, 07/30/2008
- Disbursement Information:** A table showing disbursement details.

Disbursement ID	Amounts		Disbursement Date	Disbursement Hold
	Net Amount Received	Actual Amount Disbursed		
01	1250.00	1250.00	07/30/2008	N
02				N

Step	Action
21.	<p>The first payment has been made.</p> <p>Now go to the awards page to adjust the spring disbursement.</p> <p>Navigate: Financial Aid > Awards > Award Processing > Assign Awards to a Student.</p>

Process Document

Financial Aid: Adjusting Loan Amounts-073008

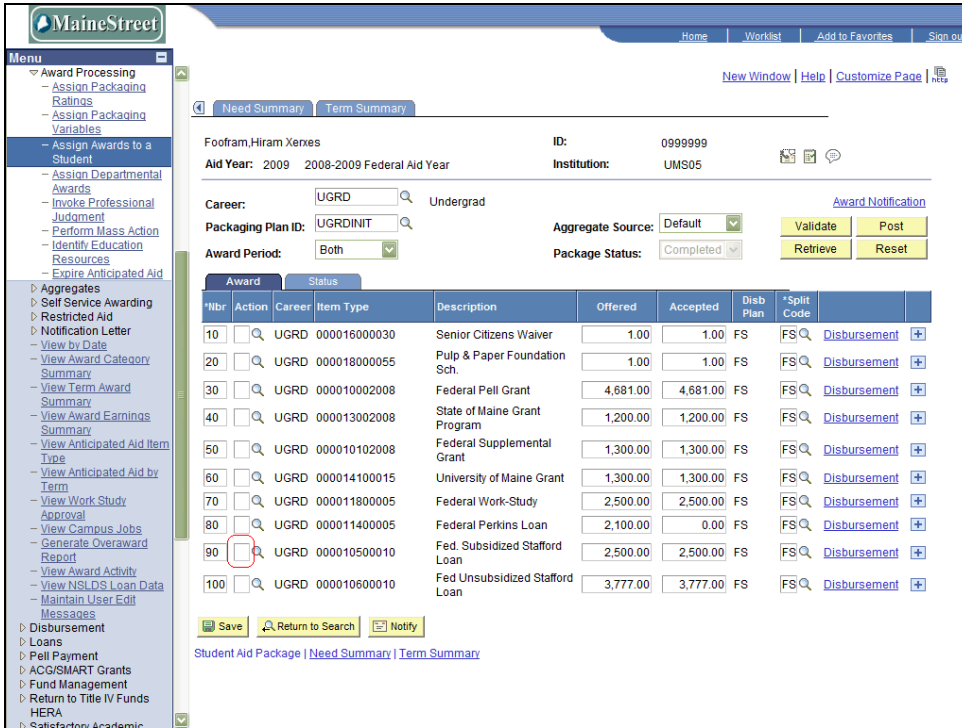


The screenshot shows the 'Award Entry' page in the MaineStreet system. The left sidebar contains a 'Menu' with various options like 'Award Processing', 'Assign Packaging', and 'View Award Category Summary'. The main content area is titled 'Award Entry' and includes a search form with the following fields:

- ID:** begins with 0999999
- Academic Institution:** UMS05
- Aid Year:** 2009
- National ID:** begins with
- Campus ID:** begins with
- Last Name:** begins with
- First Name:** begins with

Buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria' are located below the form. A 'Find an Existing Value' link is also present above the search fields.

Step	Action
22.	Search for the student. Click the Search button. <div style="border: 1px solid black; padding: 2px; display: inline-block; margin-top: 5px;">Search</div>



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[New Window](#) | [Help](#) | [Customize Page](#) | [...](#)

[Need Summary](#) | [Term Summary](#)

Footram, Hiram Xerxes ID: 0999999
 Aid Year: 2009 2008-2009 Federal Aid Year Institution: UMS05

Career: UGRD Undergrad [Award Notification](#)
 Packaging Plan ID: UGRDINIT Aggregate Source: Default [Validate](#) [Post](#)
 Award Period: Both Package Status: Completed [Retrieve](#) [Reset](#)

Award		Status								
Nbr	Action	Career	Item Type	Description	Offered	Accepted	Disb Plan	Split Code		
10	<input type="checkbox"/>	UGRD	000016000030	Senior Citizens Waiver	1.00	1.00	FS	FS	Q	Disbursement +
20	<input type="checkbox"/>	UGRD	000018000055	Pulp & Paper Foundation Sch.	1.00	1.00	FS	FS	Q	Disbursement +
30	<input type="checkbox"/>	UGRD	000010002008	Federal Pell Grant	4,681.00	4,681.00	FS	FS	Q	Disbursement +
40	<input type="checkbox"/>	UGRD	000013002008	State of Maine Grant Program	1,200.00	1,200.00	FS	FS	Q	Disbursement +
50	<input type="checkbox"/>	UGRD	000010102008	Federal Supplemental Grant	1,300.00	1,300.00	FS	FS	Q	Disbursement +
60	<input type="checkbox"/>	UGRD	000014100015	University of Maine Grant	1,300.00	1,300.00	FS	FS	Q	Disbursement +
70	<input type="checkbox"/>	UGRD	000011800005	Federal Work-Study	2,500.00	2,500.00	FS	FS	Q	Disbursement +
80	<input type="checkbox"/>	UGRD	000011400005	Federal Perkins Loan	2,100.00	0.00	FS	FS	Q	Disbursement +
90	<input type="checkbox"/>	UGRD	000010500010	Fed. Subsidized Stafford Loan	2,500.00	2,500.00	FS	FS	Q	Disbursement +
100	<input type="checkbox"/>	UGRD	000010600010	Fed Unsubsidized Stafford Loan	3,777.00	3,777.00	FS	FS	Q	Disbursement +

[Save](#) [Return to Search](#) [Notify](#)

[Student Aid Package](#) | [Need Summary](#) | [Term Summary](#)

Step	Action
23.	To adjust the spring disbursement amount for the student's subsidized Stafford loan, Enter " B " into the Action field on the loan award line.

Process Document

Financial Aid: Adjusting Loan Amounts-073008



MaineStreet

Home | Worklist | Add to Favorites | Sign out

Need Summary | Term Summary

Foofram,Hiram Xerxes ID: 0999999
 Aid Year: 2009 2008-2009 Federal Aid Year Institution: UMS05

Career: UGRD Undergrad
 Packaging Plan ID: UGRDINIT
 Award Period: Both
 Aggregate Source: Default
 Package Status: Completed

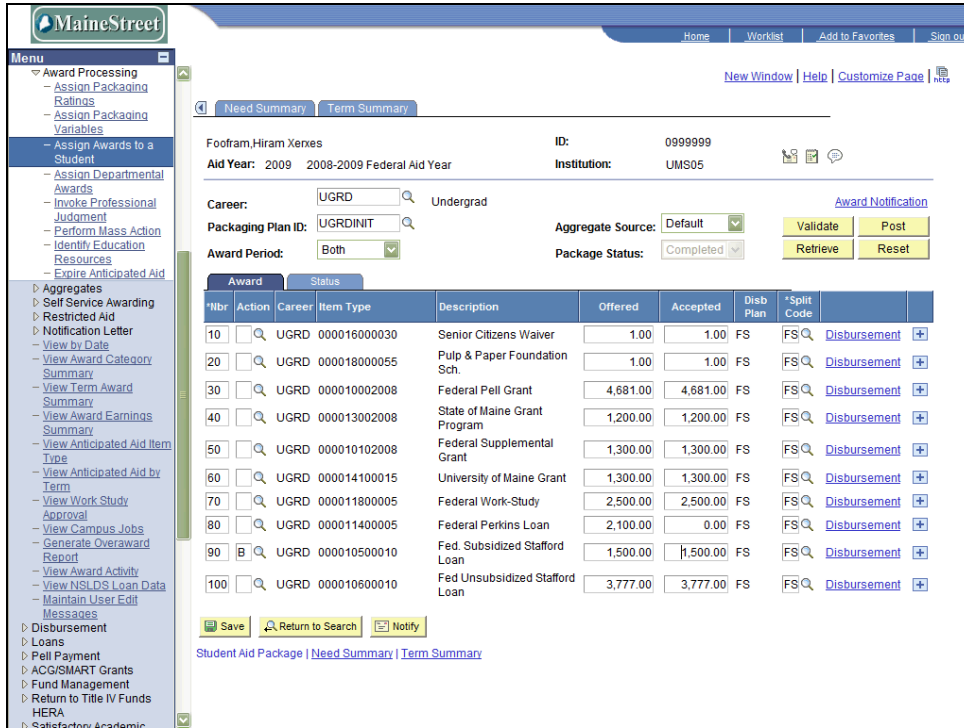
Validate Post
 Retrieve Reset

Award	Status	Nbr	Action	Career	Item Type	Description	Offered	Accepted	Disb Plan	*Split Code	
10				UGRD	000016000030	Senior Citizens Waiver	1.00	1.00	FS	FS	Disbursement
20				UGRD	000018000055	Pulp & Paper Foundation Sch.	1.00	1.00	FS	FS	Disbursement
30				UGRD	000010002008	Federal Pell Grant	4,681.00	4,681.00	FS	FS	Disbursement
40				UGRD	000013002008	State of Maine Grant Program	1,200.00	1,200.00	FS	FS	Disbursement
50				UGRD	000010102008	Federal Supplemental Grant	1,300.00	1,300.00	FS	FS	Disbursement
60				UGRD	000014100015	University of Maine Grant	1,300.00	1,300.00	FS	FS	Disbursement
70				UGRD	000011800005	Federal Work-Study	2,500.00	2,500.00	FS	FS	Disbursement
80				UGRD	000011400005	Federal Perkins Loan	2,100.00	0.00	FS	FS	Disbursement
90	B			UGRD	000010500010	Fed. Subsidized Stafford Loan	2,500.00	2,500.00	FS	FS	Disbursement
100				UGRD	000010600010	Fed Unsubsidized Stafford Loan	3,777.00	3,777.00	FS	FS	Disbursement

Save Return to Search Notify

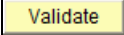
Student Aid Package | Need Summary | Term Summary

Step	Action
24.	Change the amount in the Offered field for the award. Enter the desired information into the Offered field.
25.	Press [Tab] . This copies the Offered amount into the Accepted column.



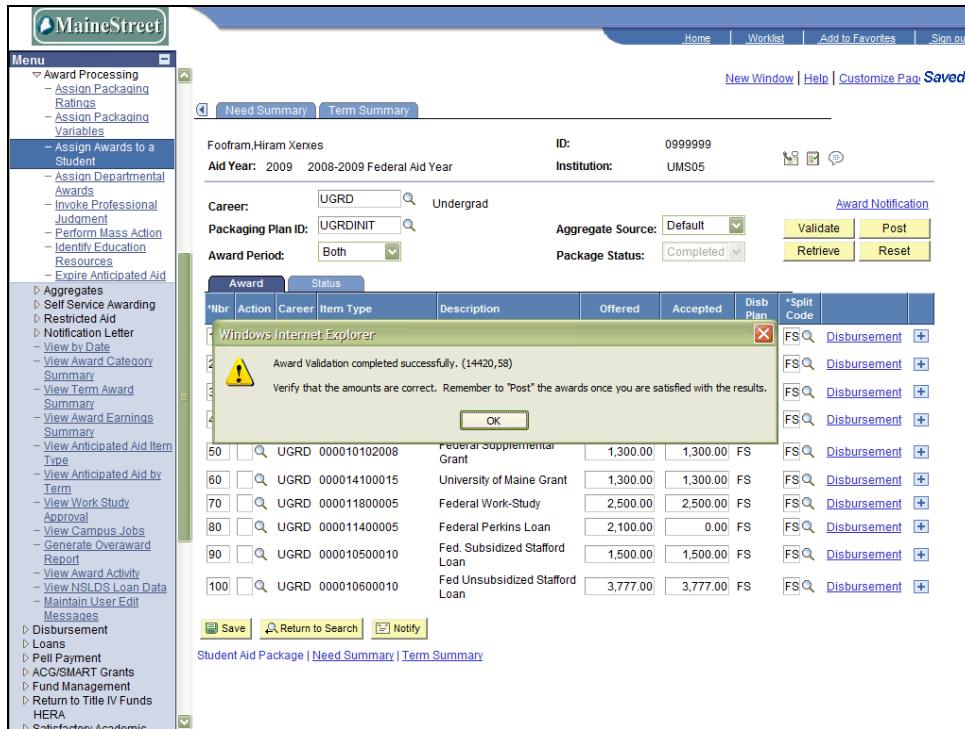
The screenshot shows the MaineStreet interface for a student named Fooram, Hiram Xerxes. The interface includes a navigation menu on the left, a header with navigation links (Home, Worklist, Add to Favorites, Sign out), and a main content area. The main content area displays the student's aid package details, including the aid year (2009), institution (UMS05), and career (UGRD). A table lists the individual aid items, including grants and loans, with columns for Nbr, Action, Career, Item Type, Description, Offered, Accepted, Disb Plan, Split Code, and Disbursement. The 'Validate' button is highlighted in the interface.

Nbr	Action	Career	Item Type	Description	Offered	Accepted	Disb Plan	Split Code	Disbursement
10		UGRD	000016000030	Senior Citizens Waiver	1.00	1.00	FS	FS Q	Disbursement
20		UGRD	000018000055	Pulp & Paper Foundation Sch.	1.00	1.00	FS	FS Q	Disbursement
30		UGRD	000010002008	Federal Pell Grant	4,681.00	4,681.00	FS	FS Q	Disbursement
40		UGRD	000013002008	State of Maine Grant Program	1,200.00	1,200.00	FS	FS Q	Disbursement
50		UGRD	000010102008	Federal Supplemental Grant	1,300.00	1,300.00	FS	FS Q	Disbursement
60		UGRD	000014100015	University of Maine Grant	1,300.00	1,300.00	FS	FS Q	Disbursement
70		UGRD	000011800005	Federal Work-Study	2,500.00	2,500.00	FS	FS Q	Disbursement
80		UGRD	000011400005	Federal Perkins Loan	2,100.00	0.00	FS	FS Q	Disbursement
90	B	UGRD	000010500010	Fed. Subsidized Stafford Loan	1,500.00	1,500.00	FS	FS Q	Disbursement
100		UGRD	000010600010	Fed Unsubsidized Stafford Loan	3,777.00	3,777.00	FS	FS Q	Disbursement

Step	Action
26.	Click the Validate button. 

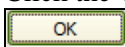
Process Document

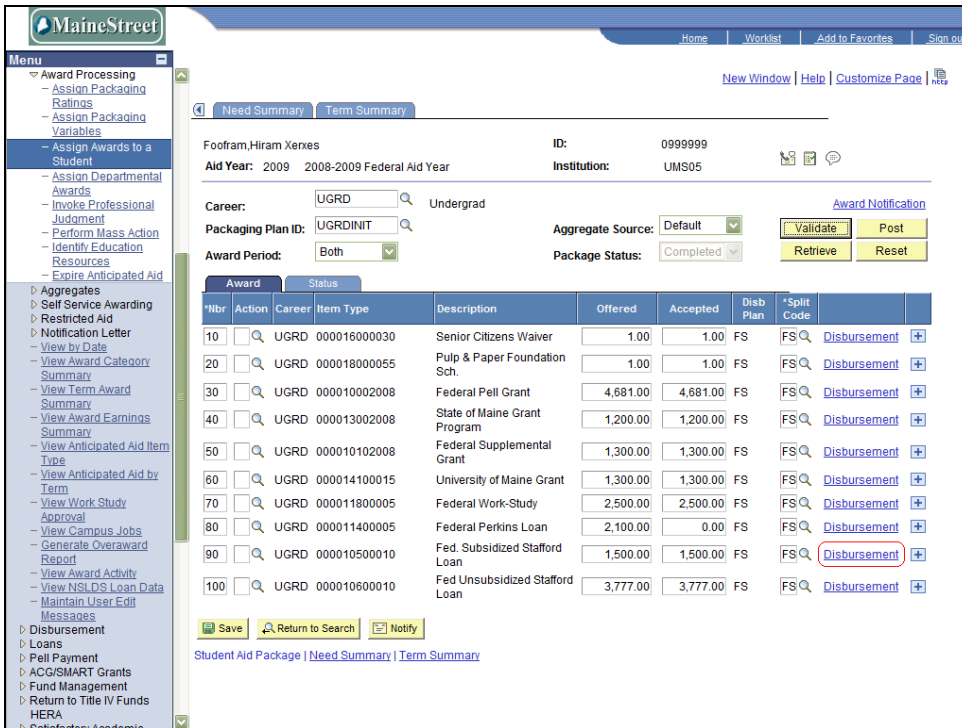
Financial Aid: Adjusting Loan Amounts-073008



Nbr	Action	Career	Item Type	Description	Offered	Accepted	Disb Plan	*Split Code
50	<input type="checkbox"/>	UGRD	000010102008	Federal Supplemental Grant	1,300.00	1,300.00	FS	FS Q Disbursement +
60	<input type="checkbox"/>	UGRD	000014100015	University of Maine Grant	1,300.00	1,300.00	FS	FS Q Disbursement +
70	<input type="checkbox"/>	UGRD	000011800005	Federal Work-Study	2,500.00	2,500.00	FS	FS Q Disbursement +
80	<input type="checkbox"/>	UGRD	000011400005	Federal Perkins Loan	2,100.00	0.00	FS	FS Q Disbursement +
90	<input type="checkbox"/>	UGRD	000010500010	Fed. Subsidized Stafford Loan	1,500.00	1,500.00	FS	FS Q Disbursement +
100	<input type="checkbox"/>	UGRD	000010600010	Fed Unsubsidized Stafford Loan	3,777.00	3,777.00	FS	FS Q Disbursement +

Step	Action
27.	Click the OK button.





The screenshot shows the MaineStreet interface for a student named Fooram, Hiram Xenex. The interface includes a menu on the left, a header with navigation links, and a main content area with a summary and a table of awards.

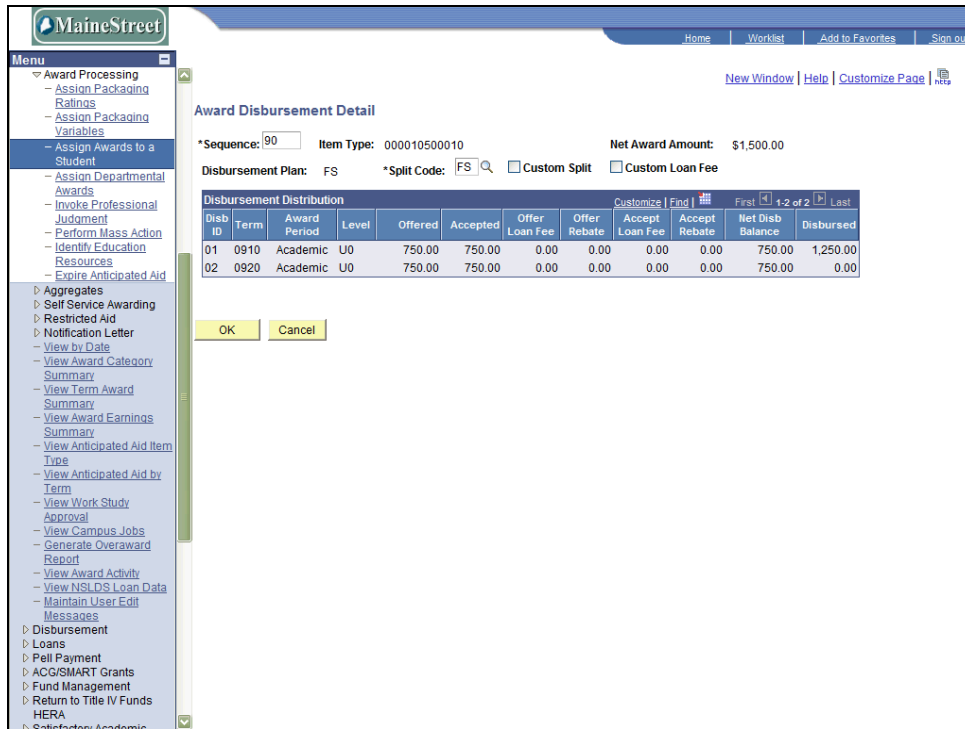
Summary:
 Career: UGRD Undergrad
 Packaging Plan ID: UGRDINIT
 Award Period: Both
 Aggregate Source: Default
 Package Status: Completed

Nbr	Action	Career	Item Type	Description	Offered	Accepted	Disb Plan	Split Code	Disbursement
10	<input type="checkbox"/>	UGRD	000016000030	Senior Citizens Waiver	1.00	1.00	FS	FS	Disbursement
20	<input type="checkbox"/>	UGRD	000018000055	Pulp & Paper Foundation Sch.	1.00	1.00	FS	FS	Disbursement
30	<input type="checkbox"/>	UGRD	000010002008	Federal Pell Grant	4,681.00	4,681.00	FS	FS	Disbursement
40	<input type="checkbox"/>	UGRD	000013002008	State of Maine Grant Program	1,200.00	1,200.00	FS	FS	Disbursement
50	<input type="checkbox"/>	UGRD	000010102008	Federal Supplemental Grant	1,300.00	1,300.00	FS	FS	Disbursement
60	<input type="checkbox"/>	UGRD	000014100015	University of Maine Grant	1,300.00	1,300.00	FS	FS	Disbursement
70	<input type="checkbox"/>	UGRD	000011800005	Federal Work-Study	2,500.00	2,500.00	FS	FS	Disbursement
80	<input type="checkbox"/>	UGRD	000011400005	Federal Perkins Loan	2,100.00	0.00	FS	FS	Disbursement
90	<input type="checkbox"/>	UGRD	000010500010	Fed. Subsidized Stafford Loan	1,500.00	1,500.00	FS	FS	Disbursement
100	<input type="checkbox"/>	UGRD	000010600010	Fed Unsubsidized Stafford Loan	3,777.00	3,777.00	FS	FS	Disbursement

Step	Action
28.	Do not post yet. Instead, click the Disbursement link for the adjusted loan award. Disbursement

Process Document

Financial Aid: Adjusting Loan Amounts-073008



Award Disbursement Detail

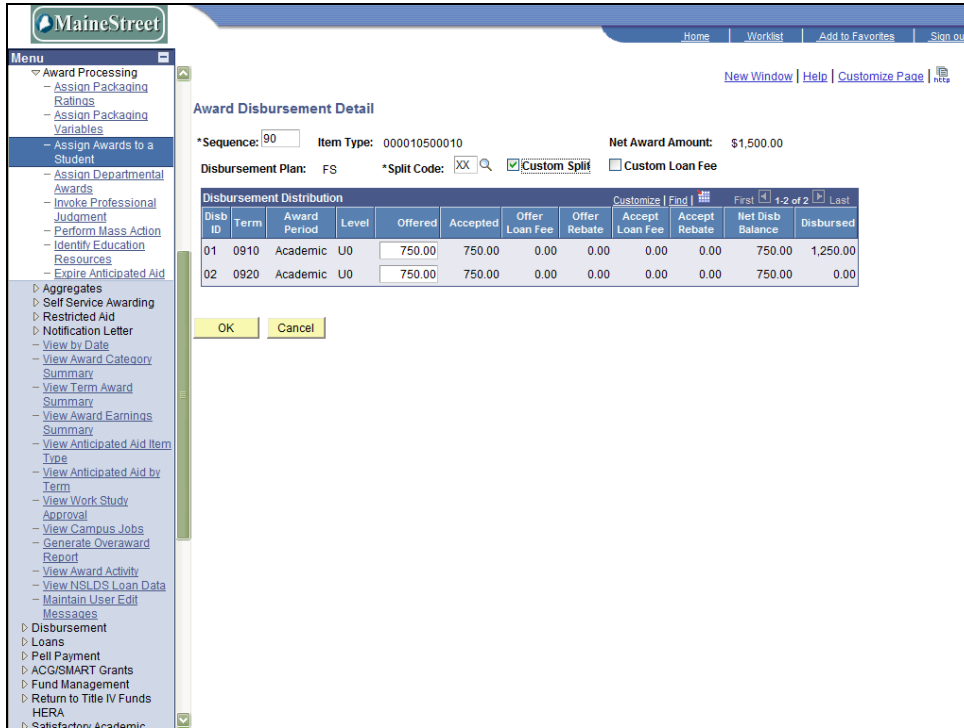
*Sequence: 90 Item Type: 000010500010 Net Award Amount: \$1,500.00

Disbursement Plan: FS *Split Code: FS Custom Split Custom Loan Fee

Disb ID	Term	Award Period	Level	Offered	Accepted	Offer Loan Fee	Offer Rebate	Accept Loan Fee	Accept Rebate	Net Disb Balance	Disbursed
01	0910	Academic	U0	750.00	750.00	0.00	0.00	0.00	0.00	750.00	1,250.00
02	0920	Academic	U0	750.00	750.00	0.00	0.00	0.00	0.00	750.00	0.00

OK Cancel

Step	Action
29.	Click the Custom Split option. <input type="checkbox"/> Custom Split



Award Disbursement Detail

*Sequence: 90 Item Type: 000010500010 Net Award Amount: \$1,500.00

Disbursement Plan: FS *Split Code: XX Custom Split Custom Loan Fee

Disb ID	Term	Award Period	Level	Offered	Accepted	Offer Loan Fee	Offer Rebate	Accept Loan Fee	Accept Rebate	Net Disb Balance	Disbursed
01	0910	Academic	U0	750.00	750.00	0.00	0.00	0.00	0.00	750.00	1,250.00
02	0920	Academic	U0	750.00	750.00	0.00	0.00	0.00	0.00	750.00	0.00

OK Cancel

Step	Action
30.	The Custom Split option opens up the Offered fields for editing. Change the Offered amount for the second disbursement to match the funds remaining for the award. In the example shown, this would be 1500-1250 since \$1250 has already been disbursed.

Process Document

Financial Aid: Adjusting Loan Amounts-073008

MaineStreet Home | Worklist | Add to Favorites | Sign out

Menu

- Award Processing
 - Assign Packaging Ratings
 - Assign Packaging Variables
 - Assign Awards to a Student
 - Assign Departmental Awards
 - Invoke Professional Judgment
 - Perform Mass Action
 - Identify Education Resources
 - Expire Anticipated Aid
- Aggregates
- Self Service Awarding
- Restricted Aid
- Notification Letter
 - View by Date
 - View Award Category Summary
 - View Term Award Summary
 - View Award Earnings Summary
 - View Anticipated Aid Item Type
 - View Anticipated Aid by Term
 - View Work Study Approval
 - View Campus Jobs
 - Generate Overaward Report
 - View Award Activity
 - View NSLDS Loan Data
 - Maintain User Edit
- Messages
- Disbursement
- Loans
- Pell Payment
- ACG/SMART Grants
- Fund Management
- Return to Title IV Funds
- HERA
- Satisfactory Academic

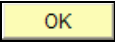
Award Disbursement Detail

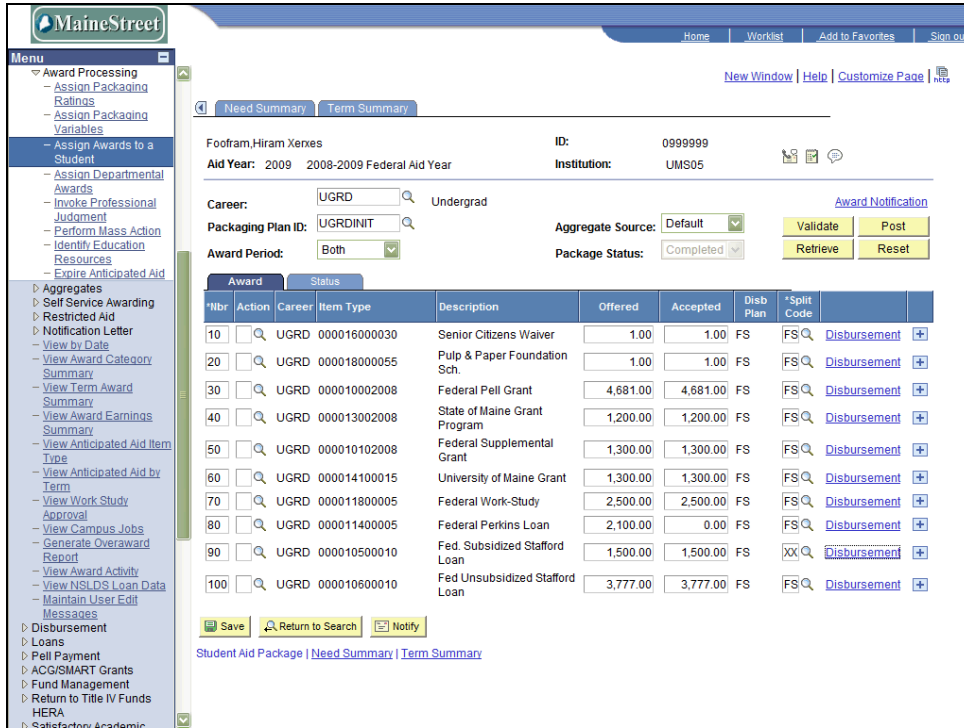
*Sequence: 90 Item Type: 000010500010 Net Award Amount: \$1,500.00

Disbursement Plan: FS *Split Code: XX Custom Split Custom Loan Fee

Disb ID	Term	Award Period	Level	Offered	Accepted	Offer Loan Fee	Offer Rebate	Accept Loan Fee	Accept Rebate	Net Disb Balance	Disbursed
01	0910	Academic	U0	750.00	750.00	0.00	0.00	0.00	0.00	750.00	1,250.00
02	0920	Academic	U0	250.00	250.00	0.00	0.00	0.00	0.00	250.00	0.00

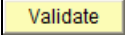
OK Cancel

Step	Action
31.	Edit the Offered field in the first disbursement row to reflect the amount that has already been disbursed. The total of the Offered fields must equal the new award amount.
32.	Click the OK button. 



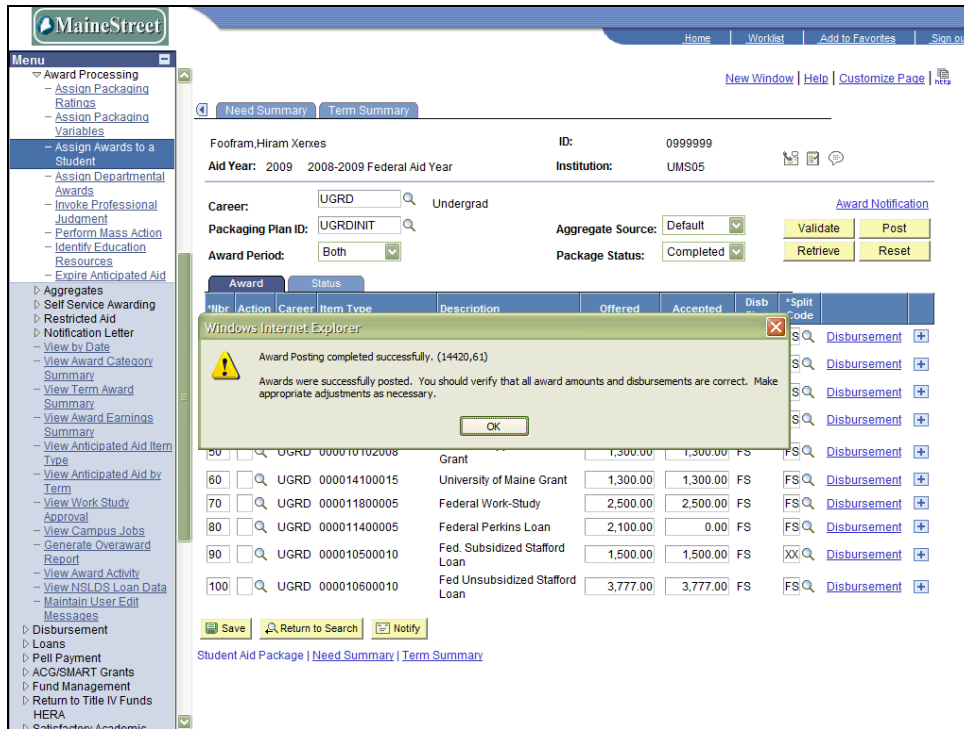
The screenshot shows the MaineStreet interface for a student named Fooram, Hiram Xerxes. The interface includes a navigation menu on the left, a header with 'Home', 'Worklist', 'Add to Favorites', and 'Sign out'. The main content area displays the student's aid package details for the 2009-2008-2009 Federal Aid Year. The student's ID is 0999999 and the institution is UMS05. The career is UGRD (Undergrad) and the packaging plan ID is UGRDINIT. The aggregate source is set to 'Default' and the package status is 'Completed'. There are buttons for 'Validate', 'Post', 'Retrieve', and 'Reset'. Below this information is a table of awards and loans.


Award		Status								
Nbr	Action	Career	Item Type	Description	Offered	Accepted	Disb Plan	Split Code		
10	<input type="checkbox"/>	UGRD	000016000030	Senior Citizens Waiver	1.00	1.00	FS	FS	Q	Disbursement
20	<input type="checkbox"/>	UGRD	000018000055	Pulp & Paper Foundation Sch.	1.00	1.00	FS	FS	Q	Disbursement
30	<input type="checkbox"/>	UGRD	000010002008	Federal Pell Grant	4,681.00	4,681.00	FS	FS	Q	Disbursement
40	<input type="checkbox"/>	UGRD	000013002008	State of Maine Grant Program	1,200.00	1,200.00	FS	FS	Q	Disbursement
50	<input type="checkbox"/>	UGRD	000010102008	Federal Supplemental Grant	1,300.00	1,300.00	FS	FS	Q	Disbursement
60	<input type="checkbox"/>	UGRD	000014100015	University of Maine Grant	1,300.00	1,300.00	FS	FS	Q	Disbursement
70	<input type="checkbox"/>	UGRD	000011800005	Federal Work-Study	2,500.00	2,500.00	FS	FS	Q	Disbursement
80	<input type="checkbox"/>	UGRD	000011400005	Federal Perkins Loan	2,100.00	0.00	FS	FS	Q	Disbursement
90	<input type="checkbox"/>	UGRD	000010500010	Fed. Subsidized Stafford Loan	1,500.00	1,500.00	FS	XX	Q	Disbursement
100	<input type="checkbox"/>	UGRD	000010600010	Fed Unsubsidized Stafford Loan	3,777.00	3,777.00	FS	FS	Q	Disbursement

Step	Action
33.	Click the Validate button. 
34.	Click OK and then Post .

Process Document

Financial Aid: Adjusting Loan Amounts-073008



Step	Action
35.	Click the OK button. 
36.	This completes the adjustment process. The adjusted loan must be processed in the usual way and the record transmitted to the lender. Please see documentation on Commonline loan origination, validation and the generation of the outbound file for details.
37.	End of Procedure.