

Version	1.0
Document Generation Date	11/6/2008
Date Modified	11/6/2008
Last Changed by	ASDS
Status	Draft

Setting Up a Lender

Concept

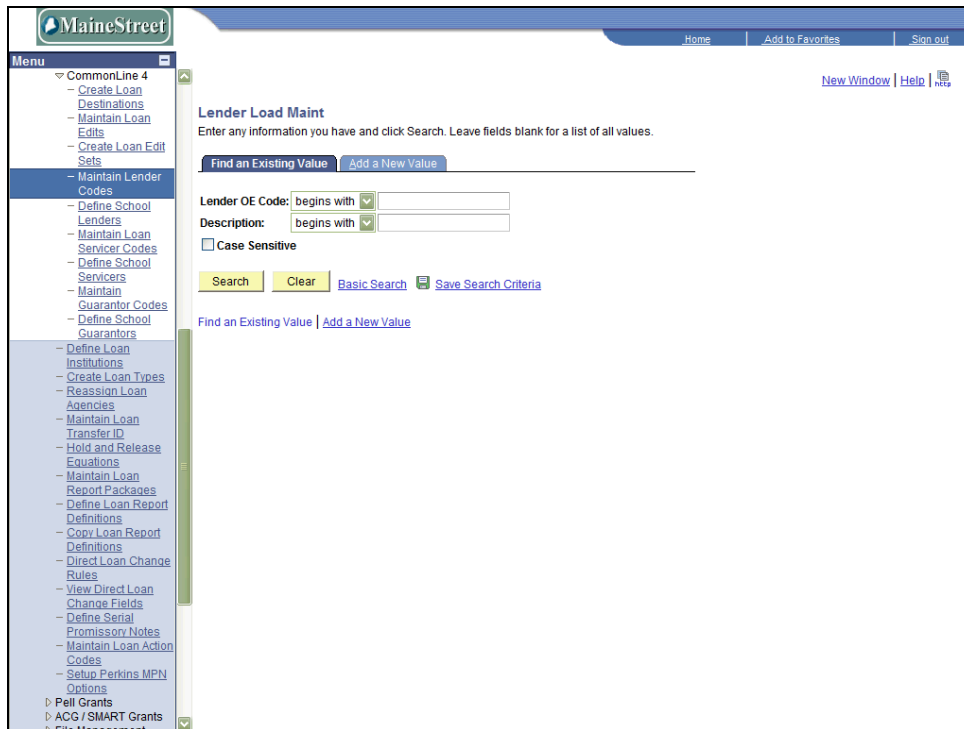
To add a lender to the database the following steps should be completed:

- (1) Use the Maintain Lender Codes component to search for an existing entry for the lender. It is very important to avoid duplicates in the lender table.
- (2) If the lender is not found, in the Maintain Lender Codes component, create the new lender entry.
- (3) Search for the lender in the Define School Lenders component. If not found, create the new lender entry in Define School Lenders.
- (4) Create the loan destination profile. If you do not find the Servicer or Guarantor you need, you may have to set those up (refer to the documentation on how to set up servicers and guarantors).
- (5) Perform the EDI setup for the lender.

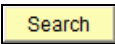
The loan participant tables in MaineStreet are shared by all the UMS Institutions. Great care must be taken to avoid duplicate entries. Before adding a new entry, please search carefully using the lender code to ensure that you don't create a duplicate.

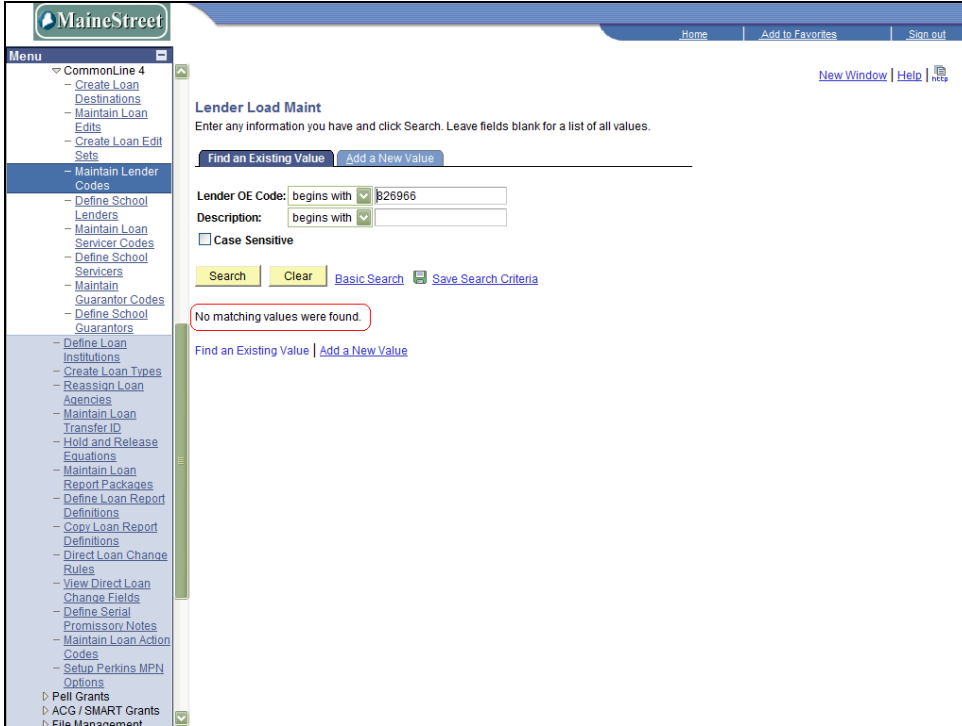
Procedure

Step	Action
1.	The first step is to determine whether an entry already exists for the lender. Navigate: Set Up SACR > Product Related > Financial Aid > Loans > Commonline 4 > Maintain Lender Codes.



The screenshot displays the 'Lender Load Maint' page. On the left is a 'Menu' sidebar with a tree view containing items like 'CommonLine 4', 'Create Loan Destinations', 'Maintain Loan Edits', 'Create Loan Edit Sets', 'Maintain Lender Codes', 'Define School Lenders', 'Maintain Loan Servicer Codes', 'Define School Servicers', 'Maintain Guarantor Codes', 'Define School Guarantors', 'Define Loan Institutions', 'Create Loan Types', 'Reassign Loan Agencies', 'Maintain Loan Transfer ID', 'Hold and Release Equations', 'Maintain Loan Report Packages', 'Define Loan Report Definitions', 'Copy Loan Report Definitions', 'Direct Loan Change Rules', 'View Direct Loan Change Fields', 'Define Serial Promission Notes', 'Maintain Loan Action Codes', 'Setup Perkins MPN Options', 'Pell Grants', and 'ACG / SMART Grants'. The main content area is titled 'Lender Load Maint' and includes the instruction: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' Below this are two tabs: 'Find an Existing Value' (selected) and 'Add a New Value'. The search form contains two dropdown menus: 'Lender OE Code:' and 'Description:', both with 'begins with' selected. There is an unchecked 'Case Sensitive' checkbox. At the bottom of the form are buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'. A footer at the bottom of the main area says 'Find an Existing Value | Add a New Value'.

Step	Action
2.	The recommended way to search for an existing lender is by entering the Lender Code in the Lender OE Code field.
3.	Click the Search button. 



MaineStreet Home Add to Favorites Sign out

Menu

- CommonLine 4
 - Create Loan Destinations
 - Maintain Loan Edits
 - Create Loan Edit Sets
 - Maintain Lender Codes
 - Define School Lenders
 - Maintain Loan Servicer Codes
 - Define School Servicers
 - Maintain Guarantor Codes
 - Define School Guarantors
 - Define Loan Institutions
 - Create Loan Types
 - Reassign Loan Agencies
 - Maintain Loan Transfer ID
 - Hold and Release Equalions
 - Maintain Loan Report Packages
 - Define Loan Report Definitions
 - Copy Loan Report Definitions
 - Direct Loan Change Rules
 - View Direct Loan Change Fields
 - Define Serial Promission/Notes
 - Maintain Loan Action Codes
 - Setup Perkins MPN Options
 - Pell Grants
 - ACG / SMART Grants
 - File Management

Lender Load Maint

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

[Find an Existing Value](#) [Add a New Value](#)

Lender OE Code: begins with

Description: begins with

Case Sensitive

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

No matching values were found.

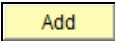
[Find an Existing Value](#) | [Add a New Value](#)

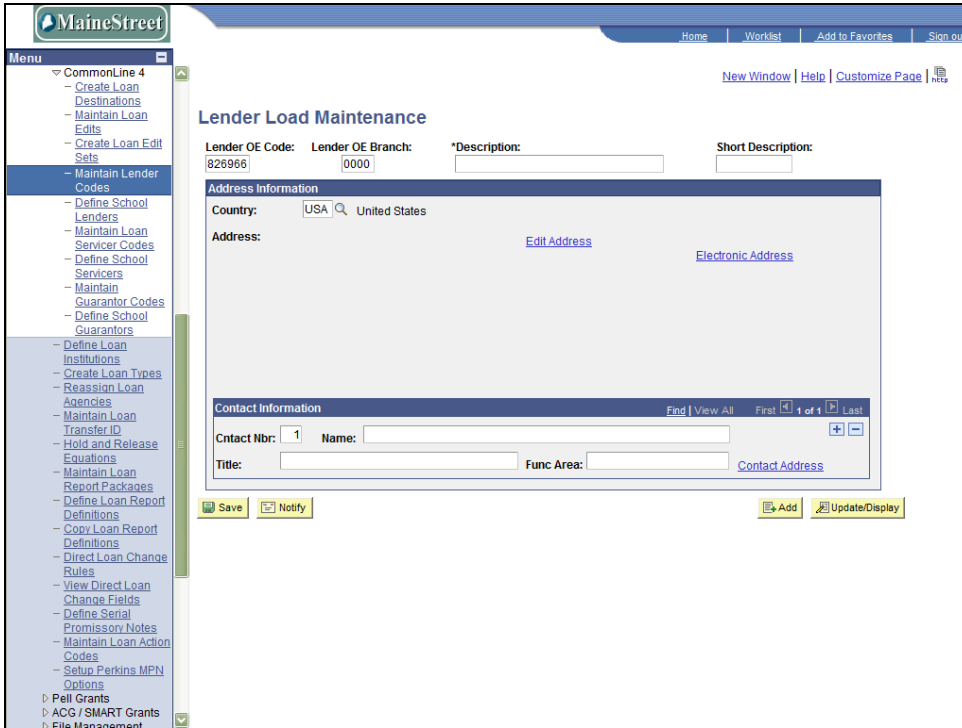
Step	Action
4.	The response "No matching values were found" indicates that there is no entry for the lender. An entry for this lender should be added to the lender maintenance table.
5.	Click the Add a New Value tab. Add a New Value

Process Document

Financial Aid: Setting Up a Lender-090908



Step	Action
6.	Make sure the correct OE code is entered. Click Add . <div style="text-align: center; margin-top: 5px;">  </div>



MaineStreet Home | Worklist | Add to Favorites | Sign out

New Window | Help | Customize Page |

Lender Load Maintenance

Lender OE Code: 826966 Lender OE Branch: 0000 *Description: Short Description:

Address Information

Country: USA United States

Address: [Edit Address](#) [Electronic Address](#)

Contact Information Find | View All First 1 of 1 Last

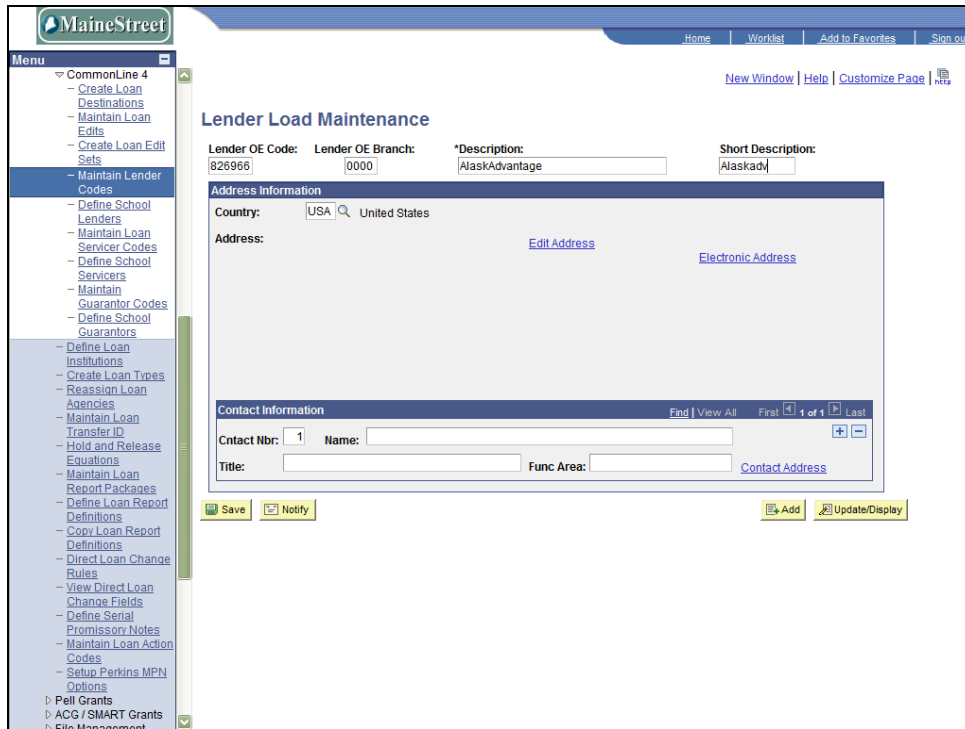
Contact Nbr: 1 Name: Title: Func Area: [Contact Address](#)

[Save](#) [Notify](#) [Add](#) [Update/Display](#)


Step	Action
7.	Enter the desired information into the Description field.
8.	Enter the desired information into the Short Description field.

Process Document

Financial Aid: Setting Up a Lender-090908



MaineStreet Home | Worklist | Add to Favorites | Sign out

New Window | Help | Customize Page | 

Lender Load Maintenance

Lender OE Code: 826966 Lender OE Branch: 0000 *Description: AlaskAdvantage Short Description: Alaskadv

Address Information

Country: USA | United States

Address: [Edit Address](#) [Electronic Address](#)

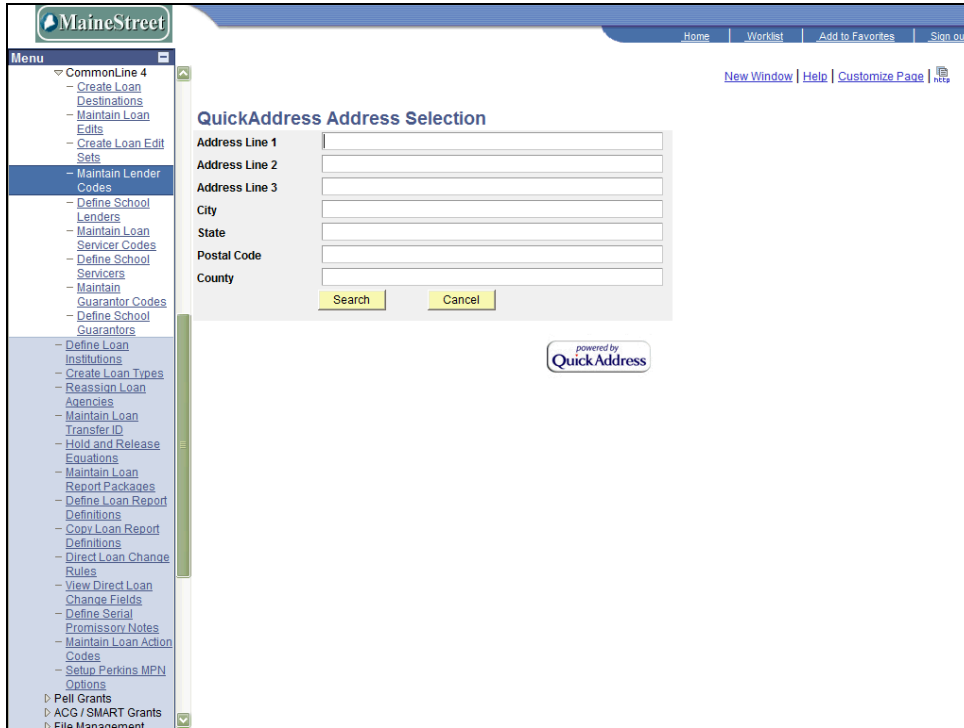
Contact Information Find | View All First 1 of 1 Last

Contact Nbr: 1 Name: [+](#) [-](#)

Title: Func Area: [Contact Address](#)

[Save](#) [Notify](#) [Add](#) [Update/Display](#)

Step	Action
9.	Optionally, enter a mailing address for the lender. Click the Edit Address link. Edit Address



The screenshot shows the 'MaineStreet' web application interface. On the left is a navigation menu with various options under 'CommonLine 4'. The main content area displays the 'QuickAddress Address Selection' form. The form contains the following fields:

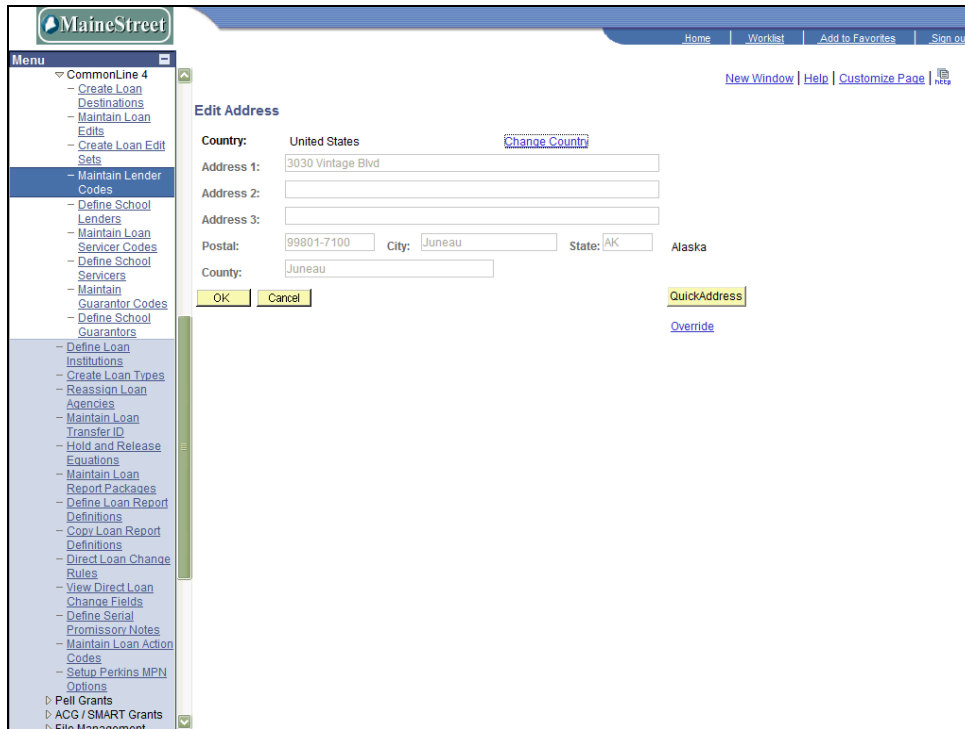
- Address Line 1
- Address Line 2
- Address Line 3
- City
- State
- Postal Code
- County

Below the fields are 'Search' and 'Cancel' buttons. A 'powered by QuickAddress' logo is located at the bottom right of the form area. The top navigation bar includes 'Home', 'Worklist', 'Add to Favorites', and 'Sign out' links.

Step	Action
10.	Enter the mailing address. Click Search to verify that the address is valid.

Process Document

Financial Aid: Setting Up a Lender-090908

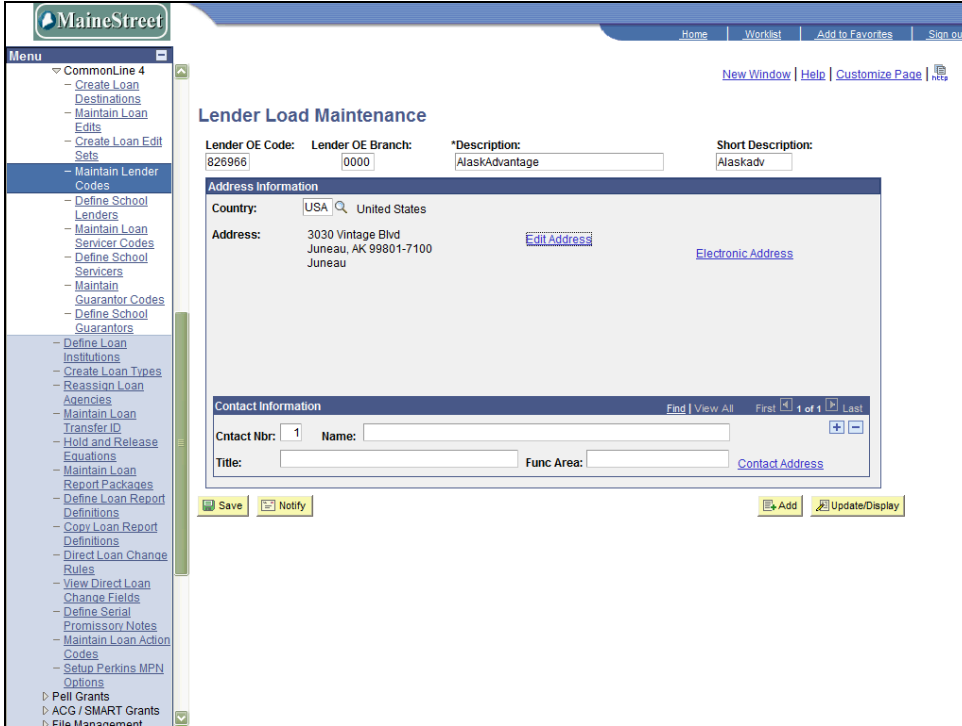


The screenshot shows the 'Edit Address' form in the MaineStreet application. The form is titled 'Edit Address' and contains the following fields and controls:

- Country:** United States (with a [Change Country](#) link)
- Address 1:** 3030 Vintage Blvd
- Address 2:** (empty field)
- Address 3:** (empty field)
- Postal:** 99801-7100
- City:** Juneau
- State:** AK (with 'Alaska' text to the right)
- County:** Juneau

Buttons at the bottom of the form include **OK**, **Cancel**, **QuickAddress**, and **Override**. A navigation menu is visible on the left side of the application window.

Step	Action
11.	When the address has been validated, click OK . <div style="border: 1px solid black; padding: 2px; display: inline-block; margin-top: 5px;">OK</div>



MaineStreet Home | Worklist | Add to Favorites | Sign out

Menu

- CommonLine 4
 - Create Loan Destinations
 - Maintain Loan Edits
 - Create Loan Edit Sets
 - Maintain Lender Codes
 - Define School Lenders
 - Maintain Loan Servicer Codes
 - Define School Servicers
 - Maintain Guarantor Codes
 - Define School Guarantors
 - Define Loan Institutions
 - Create Loan Types
 - Reassign Loan Agencies
 - Maintain Loan Transfer ID
 - Hold and Release Equalions
 - Maintain Loan Report Packages
 - Define Loan Report Definitions
 - Copy Loan Report Definitions
 - Direct Loan Change Rules
 - View Direct Loan Change Fields
 - Define Serial Promission/Notes
 - Maintain Loan Action Codes
 - Setup Perkins MPN Options
 - Pell Grants
 - ACG / SMART Grants
 - File Management

Lender Load Maintenance

Lender OE Code: 826966 Lender OE Branch: 0000 *Description: AlaskAdvantage Short Description: Alaskadv

Address Information

Country: USA United States


Address: 3030 Vintage Blvd
Juneau, AK 99801-7100

[Edit Address](#) [Electronic Address](#)

Contact Information Find | View All First 1 of 1 Last

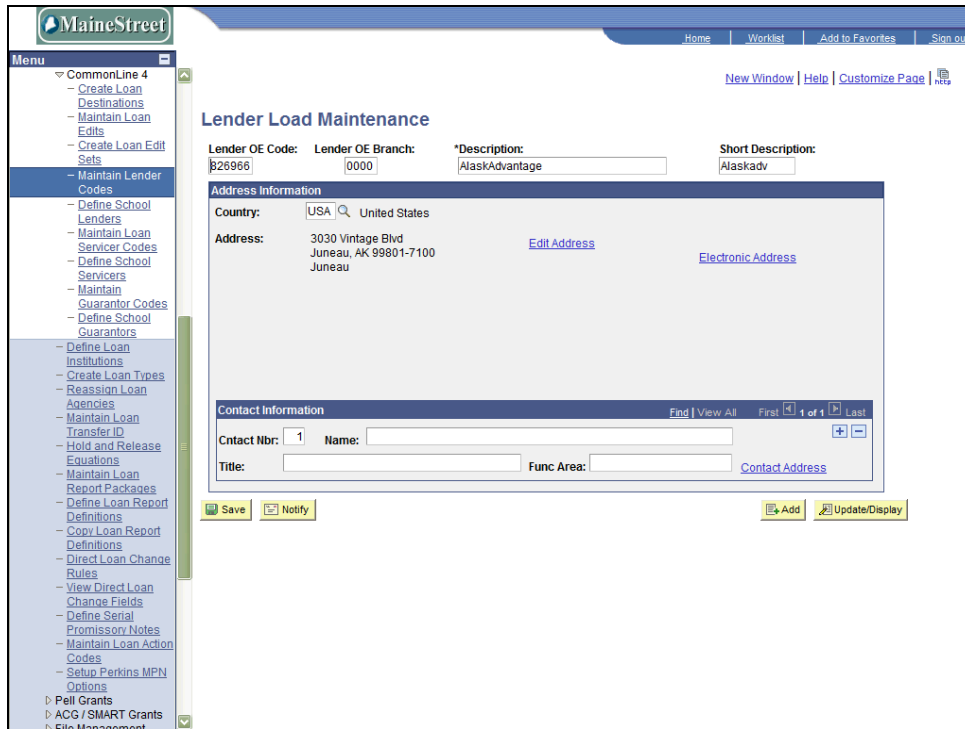
Contact Nbr: 1 Name:

Title: Func Area: [Contact Address](#)

Step	Action
12.	If you wish to enter an e-mail address for the lender, click the Electronic Address link and enter the address.
13.	Click the Save button. 

Process Document

Financial Aid: Setting Up a Lender-090908



MaineStreet Home | Worklist | Add to Favorites | Sign out

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

Lender Load Maintenance

Lender OE Code: 826966 Lender OE Branch: 0000 *Description: AlaskAdvantage Short Description: Alaskadv

Address Information

Country: USA United States

Address: 3030 Vintage Blvd Juneau, AK 99801-7100 Juneau

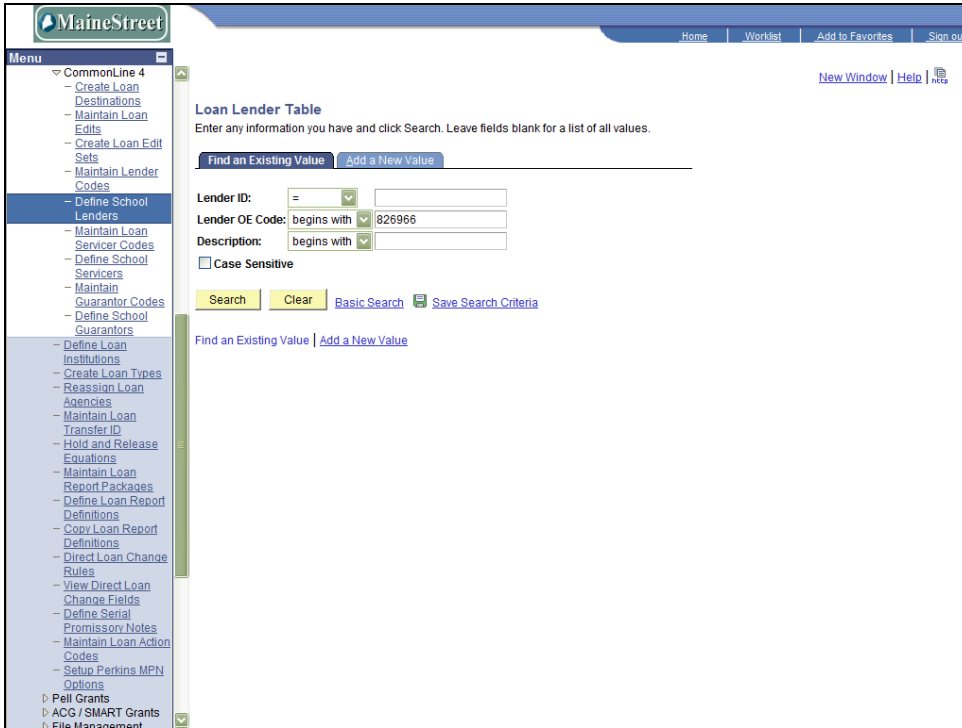
[Edit Address](#) [Electronic Address](#)

Contact Information Find | View All First 1 of 1 Last

Contact Nbr: 1 Name:

Title: Func Area: [Contact Address](#)



Step	Action
14.	Now create the lender's entry in the Define School Lenders component. Click the Define School Lenders link in the menu.



The screenshot shows the 'MaineStreet' web application interface. On the left is a 'Menu' with various options like 'CommonLine 4', 'Create Loan Destinations', 'Maintain Loan Edits', etc. The main content area is titled 'Loan Lender Table' and contains the following text: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' Below this are two tabs: 'Find an Existing Value' (selected) and 'Add a New Value'. The search form includes:

- Lender ID: [input field]
- Lender OE Code: begins with [dropdown menu] 826966 [input field]
- Description: begins with [dropdown menu] [input field]
- Case Sensitive

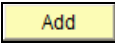
 At the bottom of the search form are buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'. Below the search form are links for 'Find an Existing Value' and 'Add a New Value'.

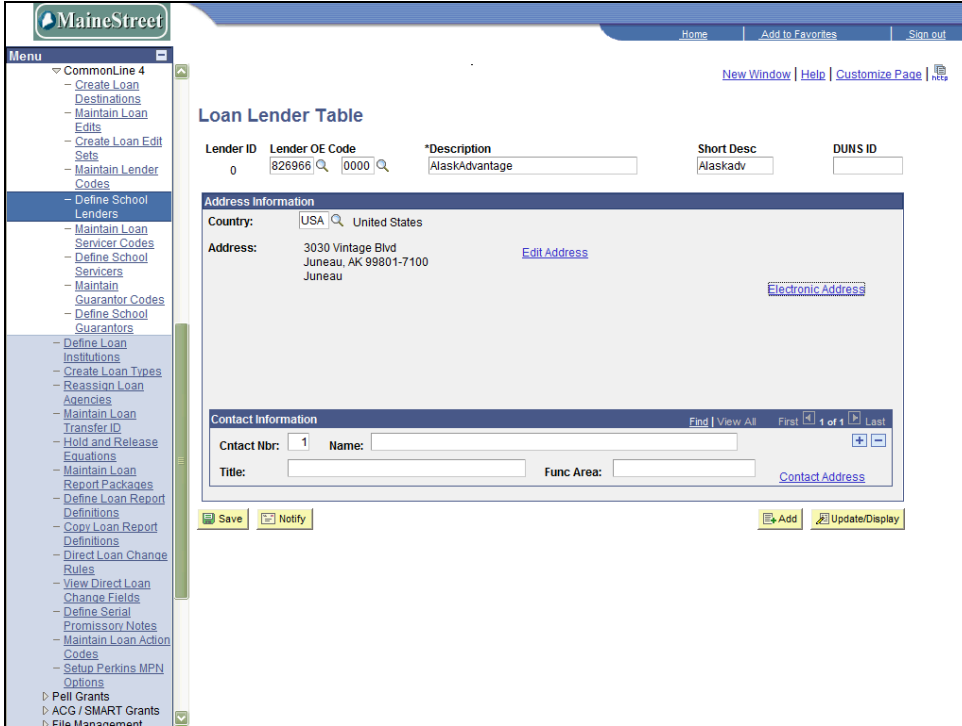
Step	Action
15.	Search for the lender to ensure that you don't create a duplicate entry. Enter the OE Code and click the Search button. 
16.	If no matching values were found, you will need to add the new lender entry. Click the Add a New Value tab. 

Process Document

Financial Aid: Setting Up a Lender-090908



Step	Action
17.	Leave the Lender ID set to 0. Click the Add button. 
18.	Enter the Lender OE Code and click the TAB key. The data from the Maintain Lender Codes table will populate this screen.

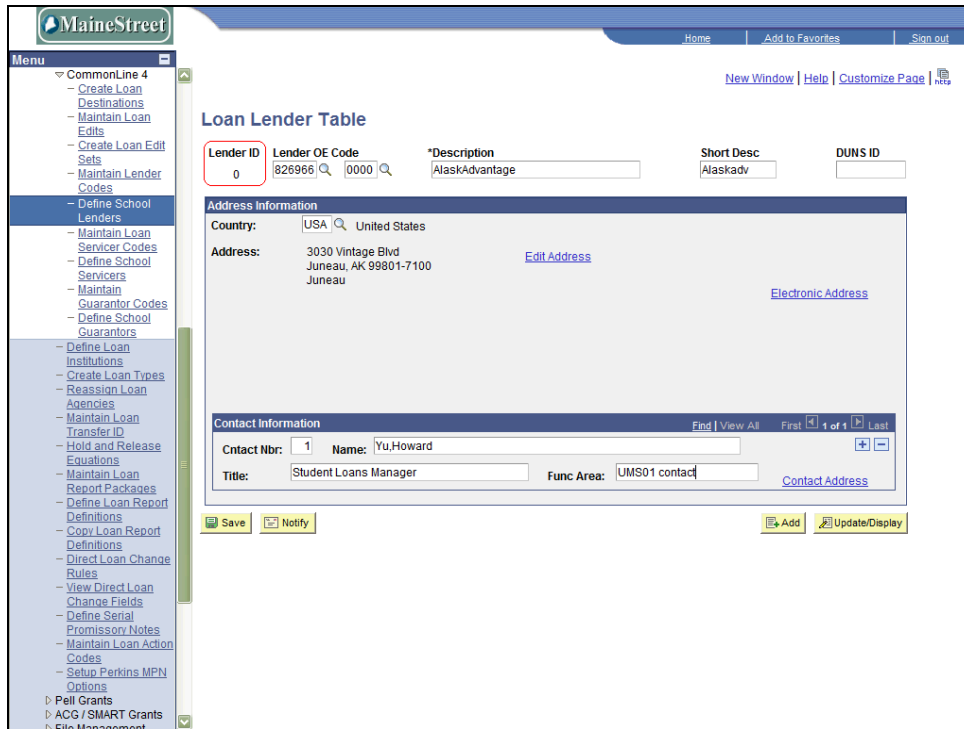



The screenshot shows the 'MaineStreet' web application interface. On the left is a navigation menu with various options like 'CommonLine 4', 'Create Loan Destinations', 'Maintain Loan Edits', etc. The main content area is titled 'Loan Lender Table' and contains a table with columns: Lender ID, Lender OE Code, *Description, Short Desc, and DUNS ID. Below the table is an 'Address Information' section with fields for Country (USA), Address (3030 Vintage Blvd, Juneau, AK 99801-7100), and Electronic Address. At the bottom is a 'Contact Information' section with fields for Contact Nbr (1), Name, Title, and Func Area. There are buttons for 'Save', 'Notify', 'Add', and 'Update/Display'.

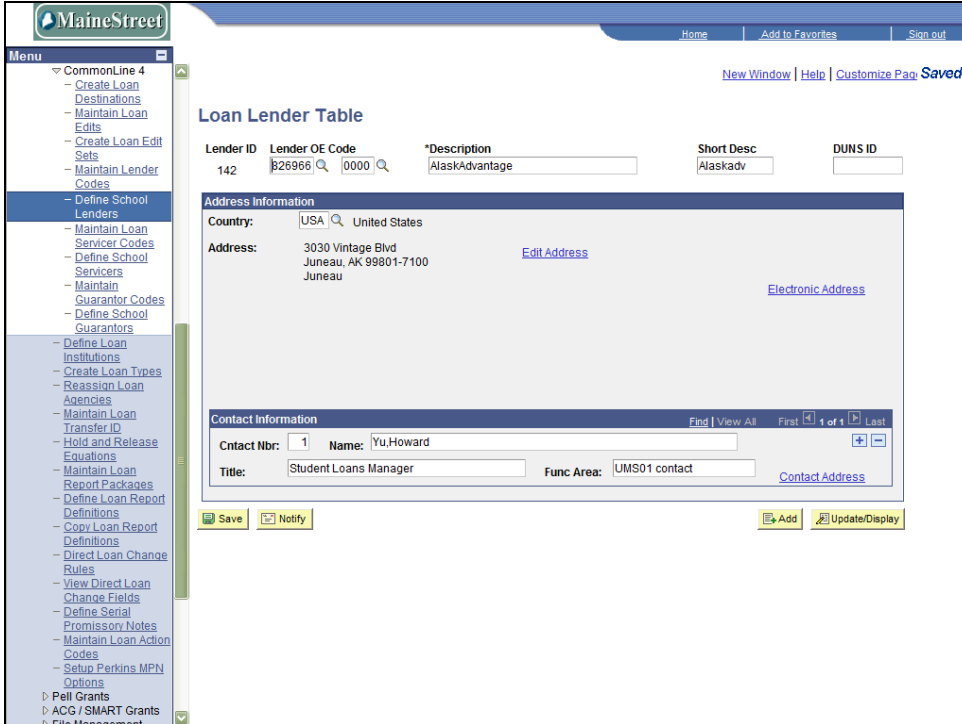
Step	Action
19.	<p>The lender table is shared by all UMS Institutions. But each Institution using a particular lender may have different contacts for the lender.</p> <p>To add contact information specific to your Institution, add a row in the Contact Information area of the page and fill in the name, address, title, etc. In the Func Area field, enter your Institution.</p>

Process Document

Financial Aid: Setting Up a Lender-090908



Step	Action
20.	Click the Save button. A new Lender ID will be assigned to the lender. Note that ID for use in the next step. 



MaineStreet Home Add to Favorites Sign out

New Window | Help | Customize Page | **Saved**

Loan Lender Table

Lender ID	Lender OE Code	*Description	Short Desc	DUNS ID
142	26966	AlaskAdvantage	Alaskadv	

Address Information

Country: USA United States

Address: 3030 Vintage Blvd
Juneau, AK 99801-7100
Juneau

[Edit Address](#)

[Electronic Address](#)

Contact Information Find | View All First 1 of 1 Last

Contact Nbr: 1 Name: Yu,Howard

Title: Student Loans Manager Func Area: UMS01 contact

[Contact Address](#)

Save Notify Add Update/Display

Step	Action
21.	<p>The next step is to create the loan destination. Click the Create Loan Destinations link in the menu (full navigation: Set Up SACR > Product Related > Financial Aid > Loans > Commonline 4 > Create Loan Destinations).</p> <p>Create Loan Destinations</p>

Process Document

Financial Aid: Setting Up a Lender-090908



MaineStreet Home Add to Favorites Sign out

New Window | Help |

Menu

- CommonLine 4
 - Create Loan Destinations
 - Maintain Loan Edits
 - Create Loan Edit Sets
 - Maintain Lender Codes
 - Define School Lenders
 - Maintain Loan Servicer Codes
 - Define School Services
 - Maintain Guarantor Codes
 - Define School Guarantors
 - Define Loan Institutions
 - Create Loan Types
 - Reassign Loan Agencies
 - Maintain Loan Transfer ID
 - Hold and Release Equations
 - Maintain Loan Report Packages
 - Define Loan Report Definitions
 - Copy Loan Report Definitions
 - Direct Loan Change Rules
 - View Direct Loan Change Fields
 - Define Serial Promission Notes
 - Maintain Loan Action Codes
 - Setup Perkins MPN Options
 - Pell Grants
 - ACG / SMART Grants
 - File Management

Loan Destination Profile

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

[Find an Existing Value](#) [Add a New Value](#)

Academic Institution: = [dropdown] [text box] [search icon]

Aid Year: = [dropdown] [text box] [search icon]

Loan Program: = [dropdown] [text box] [search icon]

Loan Destination Nbr: = [dropdown] [text box] [search icon]

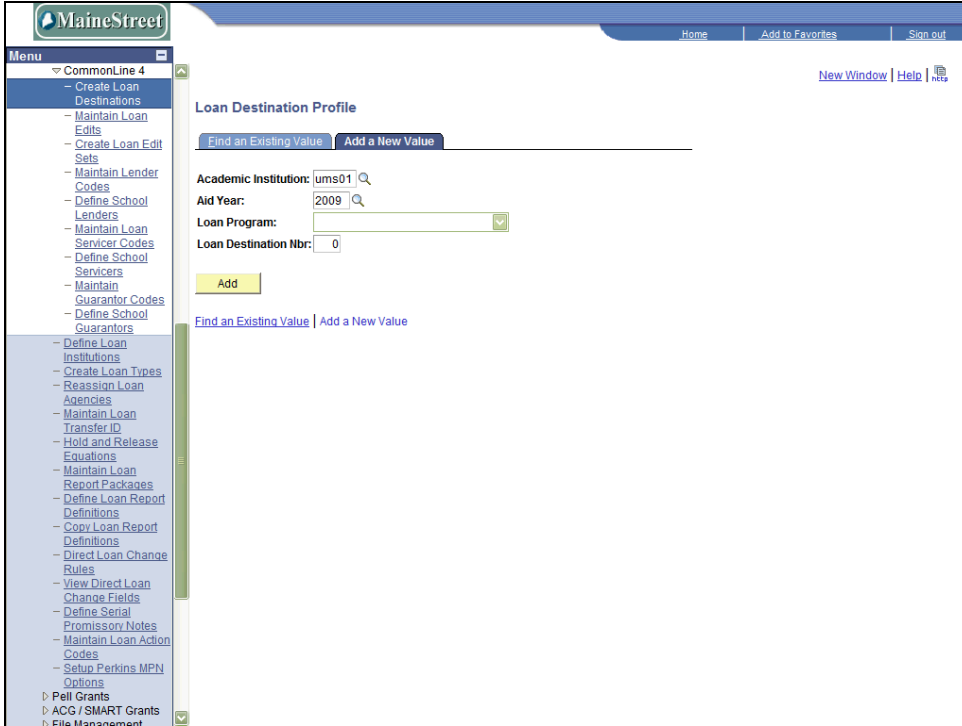
Short Description: begins with [dropdown] [text box]

Case Sensitive

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

[Find an Existing Value](#) | [Add a New Value](#)

Step	Action
22.	Click the Add a New Value tab. Add a New Value



MaineStreet Home Add to Favorites Sign out

Menu

- CommonLine 4
 - Create Loan Destinations
 - Maintain Loan Edits
 - Create Loan Edit Sets
 - Maintain Lender Codes
 - Define School Lenders
 - Maintain Loan Servicer Codes
 - Define School Servicers
 - Maintain Guarantor Codes
 - Define School Guarantors
 - Define Loan Institutions
 - Create Loan Types
 - Reassign Loan Agencies
 - Maintain Loan Transfer ID
 - Hold and Release Equalions
 - Maintain Loan Report Packages
 - Define Loan Report Definitions
 - Copy Loan Report Definitions
 - Direct Loan Change Rules
 - View Direct Loan Change Fields
 - Define Serial Promission/Notes
 - Maintain Loan Action Codes
 - Setup Perkins MPN Options
 - Pell Grants
 - ACG / SMART Grants
 - File Management

Loan Destination Profile

Find an Existing Value Add a New Value

Academic Institution: ums01

Aid Year: 2009

Loan Program: [Dropdown]

Loan Destination Nbr: 0

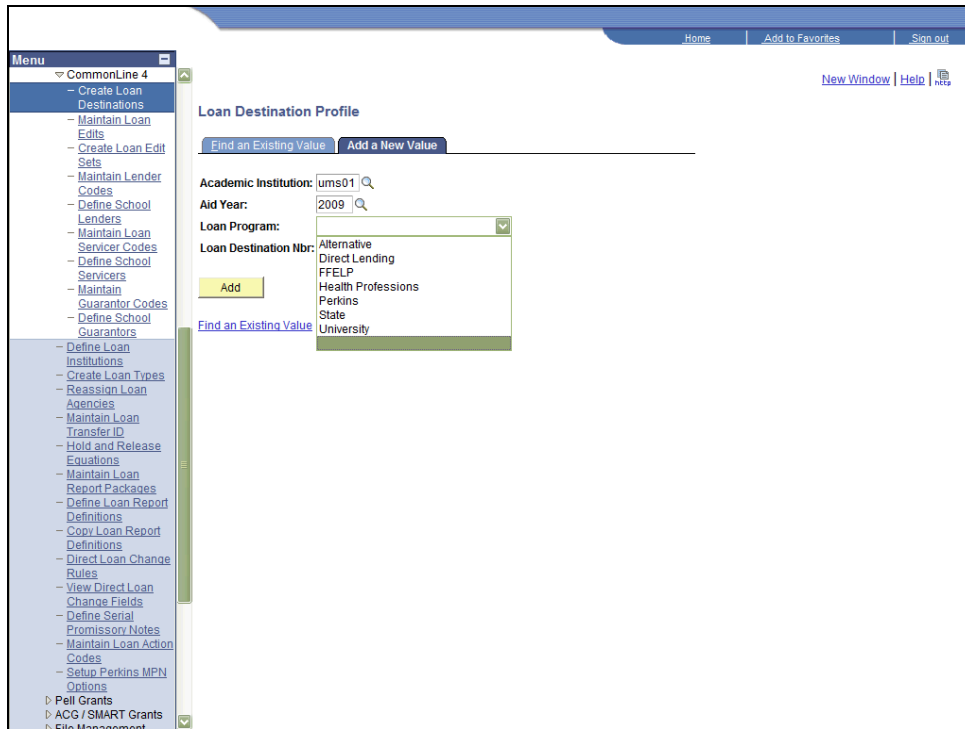
Add

Find an Existing Value | Add a New Value

Step	Action
23.	Enter the Academic Institution and Aid year . Click the Loan Program list.

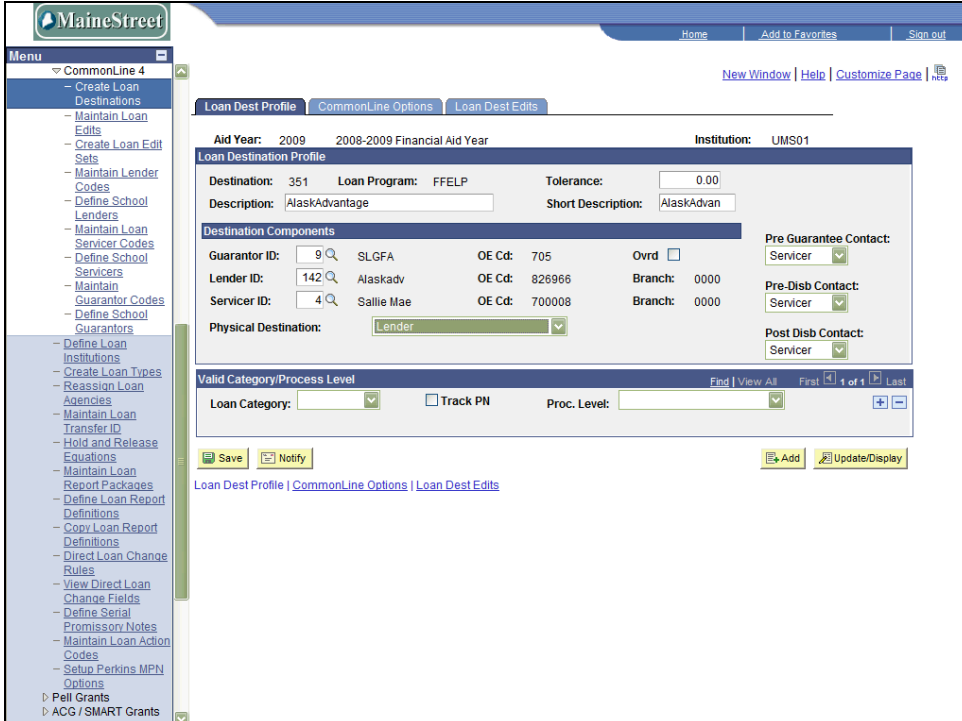
Process Document

Financial Aid: Setting Up a Lender-090908



Step	Action
24.	Select the type of loan from the list. <input type="text" value="FFELP"/>
25.	Click the Add button. <input type="button" value="Add"/>
26.	The fields on the Loan Dest Profile page will vary slightly depending on whether the loan type is Direct Lending or something else. The Tolerance field is not used. Fill in the lender Description and Short Description .

Step	Action
27.	<p>Fill in the fields in the Destination Components section of the page. You must fill in at least the Guarantor ID. If you don't find the desired Servicer and/or Guarantor, you will have to create the entries. Refer to the documentation on entering Servicers and Guarantors.</p> <p>The Lender ID should be the ID of the lender created in the previous step.</p> <p>Check the Ovrd checkbox if you do not fill in all three IDs: Guarantor, Lender and Servicer.</p> <p>Select the Pre Guarantee Contact, the Pre-Disb Contact and the Post Disb Contact (these fields are for information only).</p> <p>Values for the Physical Destination field are: <i>Servicer, Lender and Guarantor</i>. Select the destination to receive the loan application.</p>



The screenshot displays the 'Loan Destination Profile' form in the MaineStreet system. The form is for the 2009-2008-2009 Financial Aid Year at institution UMS01. It includes fields for Destination (351), Loan Program (FFELP), and Tolerance (0.00). The Description is 'AlaskAdvantage' and the Short Description is 'AlaskAdvan'. The 'Destination Components' section contains fields for Guarantor ID (9), Lender ID (142), and Servicer ID (4), each with a search icon. It also includes OE Cd, Branch, and an 'Ovrd' checkbox. The 'Physical Destination' is set to 'Lender'. On the right, there are dropdown menus for 'Pre Guarantee Contact', 'Pre-Disb Contact', and 'Post Disb Contact', all currently set to 'Servicer'. At the bottom, there are 'Valid Category/Process Level' fields, a 'Track PN' checkbox, and 'Proc. Level' dropdown. Action buttons for 'Save', 'Notify', 'Add', and 'Update/Display' are visible.

Process Document

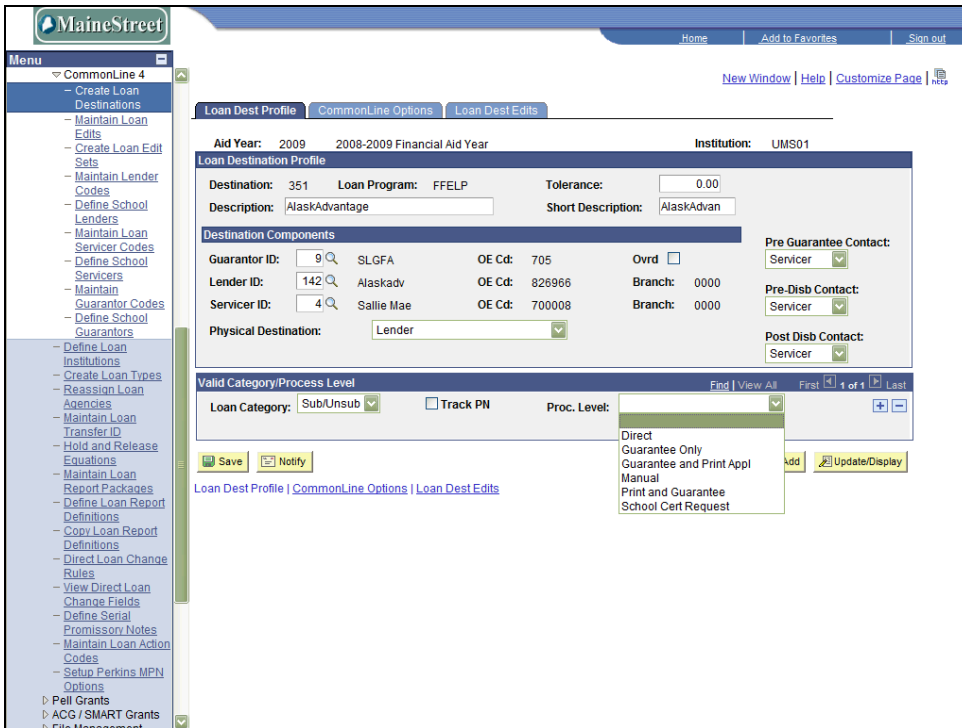
Financial Aid: Setting Up a Lender-090908



Step	Action
28.	In the Valid Category/Process Level area of the page, you will need a row for each Loan Category handled by this lender. Click the Loan Category list.

The screenshot shows the 'MaineStreet' interface for setting up a lender. The 'Valid Category/Process Level' section is active, displaying a table with columns for 'Loan Category', 'Track PN', and 'Proc. Level'. The 'Loan Category' dropdown is open, showing options: Alt Loan, PLUS, Sub/Unsub, and Subsidized. The 'Proc. Level' dropdown is also visible. The interface includes a menu on the left, a top navigation bar, and a main content area with various fields and buttons.

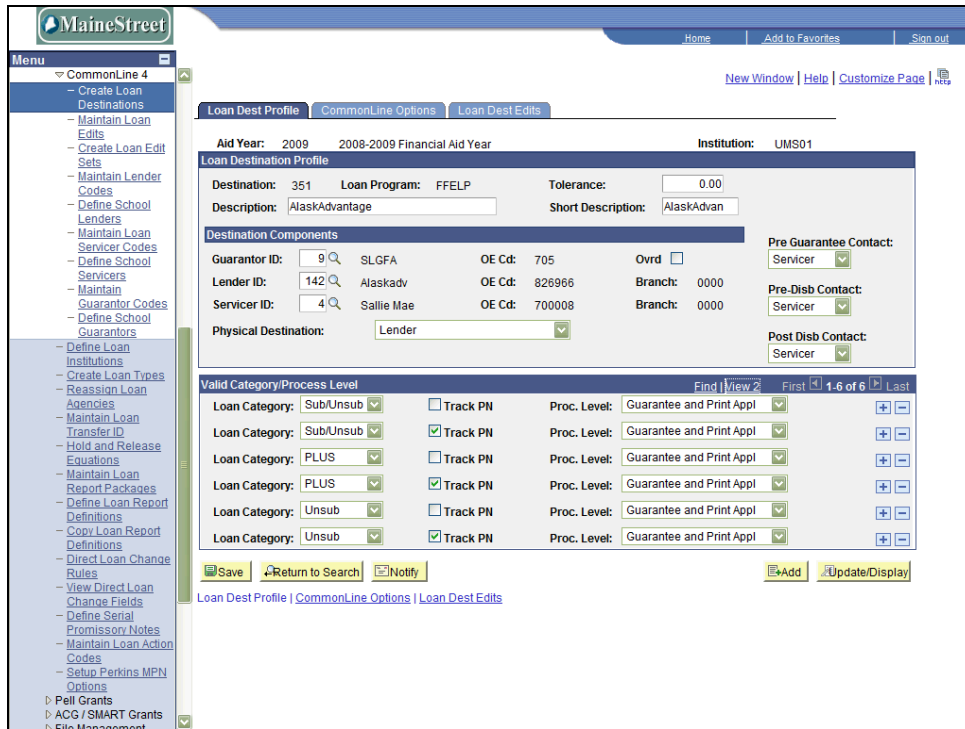
Step	Action
29.	Select the loan category. <input type="text" value="Sub/Unsub"/>
30.	Click the Proc. Level list.



Step	Action
31.	Select the desired processing level. <input type="text" value="Guarantee and Print Appl"/>
32.	To add more loan categories, lick the Add a new row button. <input type="button" value="+"/>

Process Document

Financial Aid: Setting Up a Lender-090908



The screenshot shows the 'Loan Destination Profile' configuration page in the MaineStreet system. The page is titled 'Loan Destination Profile' and includes the following sections:

- Aid Year:** 2009 (2008-2009 Financial Aid Year)
- Institution:** UMS01
- Destination:** 351
- Loan Program:** FFELP
- Tolerance:** 0.00
- Description:** AlaskAdvantage
- Short Description:** AlaskAdvan

Destination Components:

Guarantor ID:	9	SLGFA	OE Cd:	705	Ovrd:	<input type="checkbox"/>	Pre Guarantee Contact:	Servicer
Lender ID:	142	Alaskadv	OE Cd:	826966	Branch:	0000	Pre-Disb Contact:	Servicer
Servicer ID:	4	Sallie Mae	OE Cd:	700008	Branch:	0000	Post Disb Contact:	Servicer

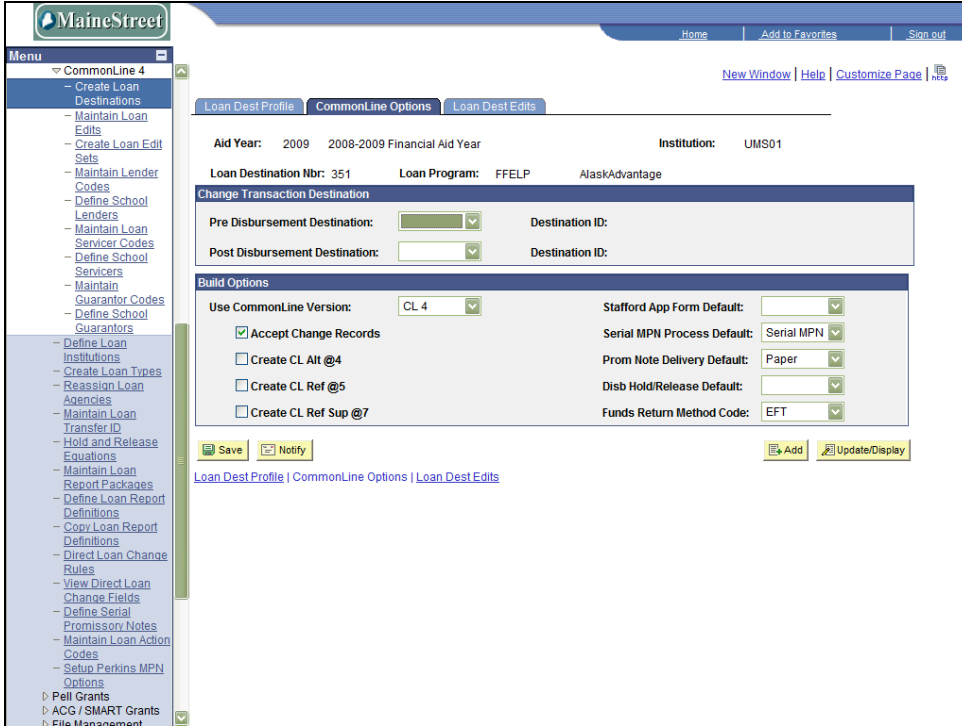
Physical Destination: Lender

Valid Category/Process Level:

Loan Category	Track PN	Proc. Level
Sub/Unsub	<input type="checkbox"/>	Guarantee and Print Appl
Sub/Unsub	<input checked="" type="checkbox"/>	Guarantee and Print Appl
PLUS	<input type="checkbox"/>	Guarantee and Print Appl
PLUS	<input checked="" type="checkbox"/>	Guarantee and Print Appl
Unsub	<input type="checkbox"/>	Guarantee and Print Appl
Unsub	<input checked="" type="checkbox"/>	Guarantee and Print Appl

Buttons: Save, Return to Search, Notify, Add, Update/Display

Step	Action
33.	You may wish to insert two rows for each Loan Category selected - one with Prom Note tracking off (PN checkbox unchecked) and one with Prom Note tracking on.
34.	Click the CommonLine Options tab. CommonLine Options

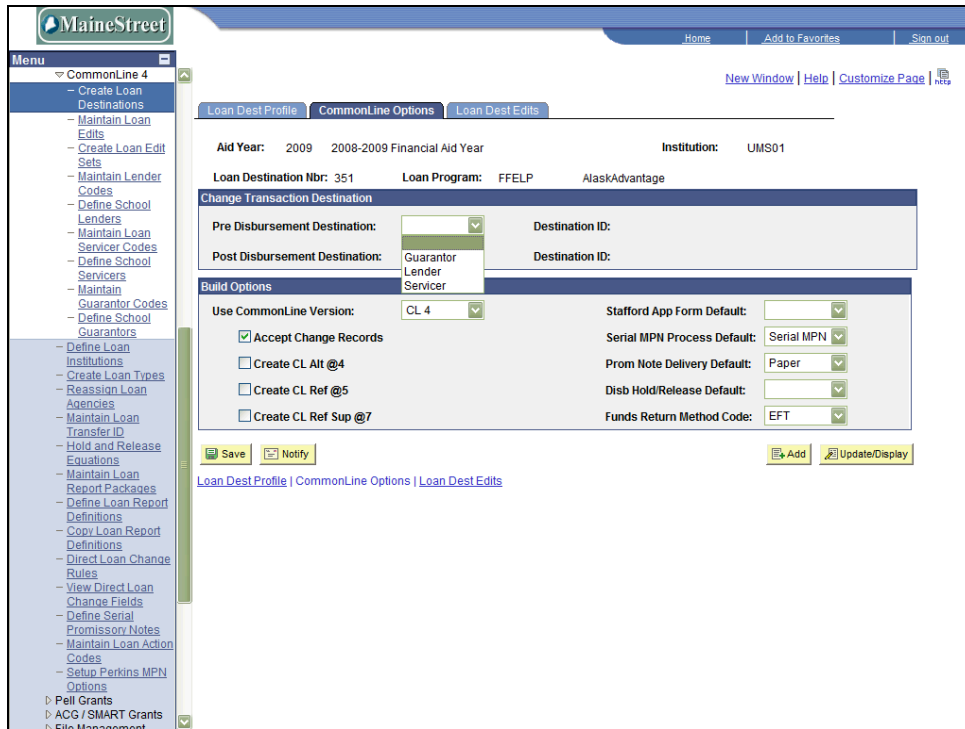


The screenshot shows the 'CommonLine Options' page in the MaineStreet system. The left-hand menu is expanded to show 'CommonLine 4' and its sub-items, including 'Create Loan Destinations', 'Maintain Loan Edits', 'Create Loan Edit Sets', 'Maintain Lender Codes', 'Define School Leaders', 'Maintain Loan Servicer Codes', 'Define School Servicers', 'Maintain Guarantor Codes', 'Define School Guarantors', 'Define Loan Institutions', 'Create Loan Types', 'Reassign Loan Agencies', 'Maintain Loan Transfer ID', 'Hold and Release Equalizations', 'Maintain Loan Report Packages', 'Define Loan Report Definitions', 'Copy Loan Report Definitions', 'Direct Loan Change Rules', 'View Direct Loan Change Fields', 'Define Serial Promission/Notes', 'Maintain Loan Action Codes', 'Setup Perkins MPN Options', 'Pell Grants', 'ACG / SMART Grants', and 'File Management'. The main content area has three tabs: 'Loan Dest Profile', 'CommonLine Options', and 'Loan Dest Edits'. The 'CommonLine Options' tab is selected. It displays the following information: 'Aid Year: 2009 2008-2009 Financial Aid Year', 'Institution: UMS01', 'Loan Destination Nbr: 351', and 'Loan Program: FFELP AlaskAdvantage'. Below this is a 'Change Transaction Destination' section with two rows of dropdown menus for 'Pre Disbursement Destination' and 'Post Disbursement Destination', each with a 'Destination ID' field. The 'Build Options' section contains several settings: 'Use CommonLine Version' set to 'CL 4', 'Accept Change Records' checked, 'Create CL Alt @4' unchecked, 'Create CL Ref @5' unchecked, 'Create CL Ref Sup @7' unchecked, 'Stafford App Form Default' as a dropdown, 'Serial MPN Process Default' set to 'Serial MPN', 'Prom Note Delivery Default' set to 'Paper', 'Disb Hold/Release Default' as a dropdown, and 'Funds Return Method Code' set to 'EFT'. At the bottom of the form are 'Save', 'Notify', 'Add', and 'Update/Display' buttons. Navigation links at the bottom include 'Loan Dest Profile | CommonLine Options | Loan Dest Edits'.

Step	Action
35.	<p>On the CommonLine Options page, designate the loan agency to receive change transaction records when a loan adjustment occurs before or after the receipt of loan funds by the school.</p> <p>Click the Pre Disbursement Destination list.</p>

Process Document

Financial Aid: Setting Up a Lender-090908



The screenshot shows the 'CommonLine Options' tab in the MaineStreet system. The interface includes a navigation menu on the left and a main content area with the following details:

- Aid Year:** 2009 (2008-2009 Financial Aid Year)
- Institution:** UMS01
- Loan Destination Nbr:** 351
- Loan Program:** FFELP AlaskAdvantage

The 'Change Transaction Destination' section contains:

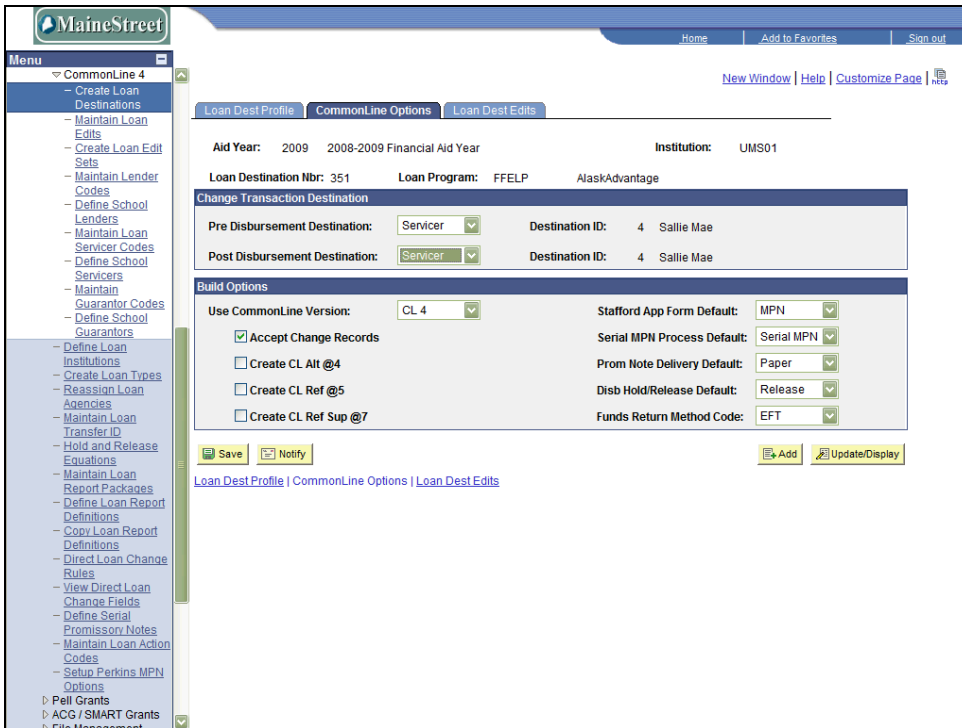
- Pre Disbursement Destination:** A dropdown menu with 'Guarantor Lender Servicer' selected.
- Post Disbursement Destination:** A dropdown menu with 'Guarantor Lender Servicer' selected.
- Destination ID:** Two empty text input fields.

The 'Build Options' section contains:

- Use CommonLine Version:** CL 4 (dropdown)
- Accept Change Records
- Create CL Alt @4
- Create CL Ref @5
- Create CL Ref Sup @7
- Stafford App Form Default:** (dropdown)
- Serial MPN Process Default:** Serial MPN (dropdown)
- Prom Note Delivery Default:** Paper (dropdown)
- Disb Hold/Release Default:** (dropdown)
- Funds Return Method Code:** EFT (dropdown)

Buttons for 'Save', 'Notify', 'Add', and 'Update/Display' are visible at the bottom of the form.

Step	Action
36.	Select the loan agency. <input data-bbox="370 1108 508 1136" type="text" value="Servicer"/>



MaineStreet Home Add to Favorites Sign out

New Window | Help | Customize Page |

Menu

- CommonLine 4
 - Create Loan Destinations
 - Maintain Loan Edits
 - Create Loan Edit Sets
 - Maintain Lender Codes
 - Define School Leaders
 - Maintain Loan Servicer Codes
 - Define School Servicers
 - Maintain Guarantor Codes
 - Define School Guarantors
 - Define Loan Institutions
 - Create Loan Types
 - Reassign Loan Agencies
 - Maintain Loan Transfer ID
 - Hold and Release Equalities
 - Maintain Loan Report Packages
 - Define Loan Report Definitions
 - Copy Loan Report Definitions
 - Direct Loan Change Rules
 - View Direct Loan Change Fields
 - Define Serial Promission/Notes
 - Maintain Loan Action Codes
 - Setup Perkins MPN Options
 - Pell Grants
 - ACG / SMART Grants
 - File Management

Loan Dest Profile | **CommonLine Options** | Loan Dest Edits

Aid Year: 2009 2008-2009 Financial Aid Year Institution: UMS01

Loan Destination Nbr: 351 Loan Program: FFELP AlaskAdvantage

Change Transaction Destination

Pre Disbursement Destination: Servicer Destination ID: 4 Sallie Mae

Post Disbursement Destination: Servicer Destination ID: 4 Sallie Mae

Build Options

Use CommonLine Version: CL 4 Stafford App Form Default: MPN

Accept Change Records Serial MPN Process Default: Serial MPN

Create CL Alt @4 Prom Note Delivery Default: Paper

Create CL Ref @5 Disb Hold/Release Default: Release

Create CL Ref Sup @7 Funds Return Method Code: EFT

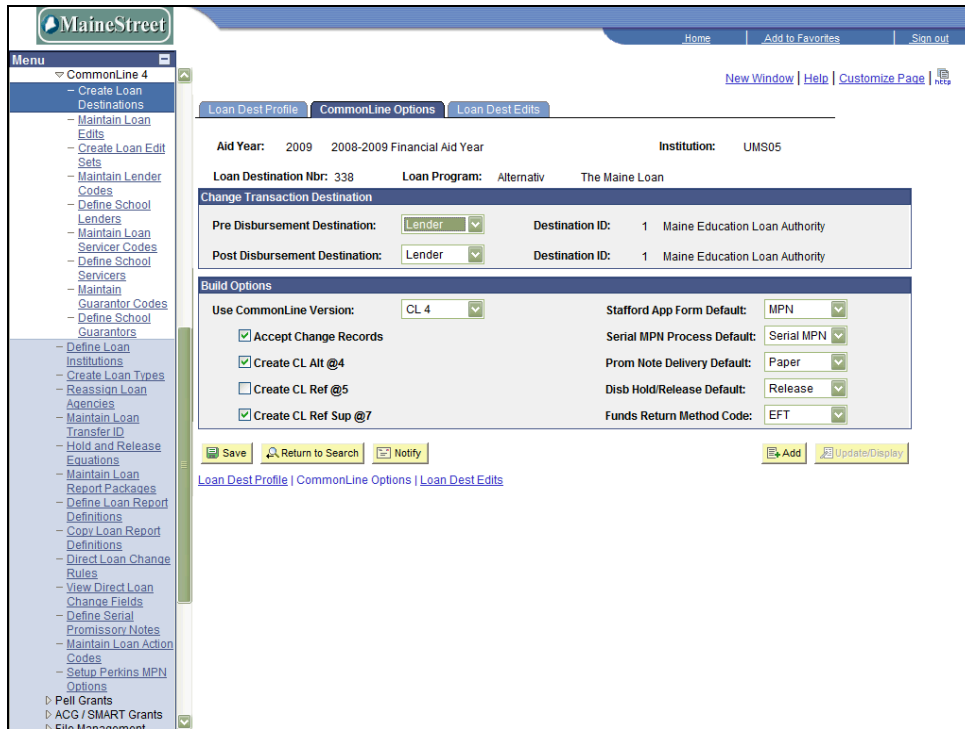
Save Notify Add Update/Display

Loan Dest Profile | CommonLine Options | Loan Dest Edits

Step	Action
37.	<p>The Use CommonLine Version field must be set to CL4. The Accept Change Records checkbox should be selected.</p> <p>For FFELP loans, do not select Create CL Alt @4, Create CL Ref @5 or Create CL Ref Sup @7.</p> <p>However, for Alternative loans you should select Create CL Alt @4 and Create CL Ref Sup @7.</p> <p>Select the appropriate values for the five checkboxes on the right side of the Build Options page section.</p>

Process Document

Financial Aid: Setting Up a Lender-090908



The screenshot displays the 'CommonLine Options' page for an Alternative loan type. The interface includes a left-hand menu with various system functions, a top navigation bar with 'Home', 'Add to Favorites', and 'Sign out' links, and a main content area with three tabs: 'Loan Dest Profile', 'CommonLine Options', and 'Loan Dest Edits'. The 'CommonLine Options' tab is active, showing the following details:

- Aid Year:** 2009 (2008-2009 Financial Aid Year)
- Institution:** UMS05
- Loan Destination Nbr:** 338
- Loan Program:** Alternativ (The Maine Loan)

The 'Change Transaction Destination' section contains:

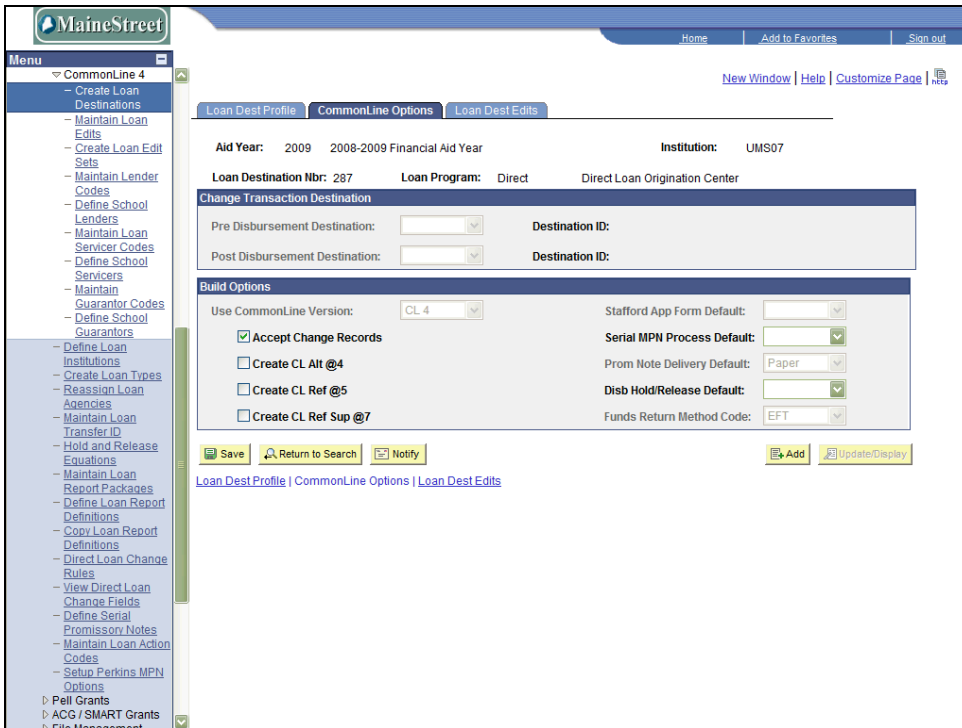
- Pre Disbursement Destination:** Lender (dropdown), Destination ID: 1 (Maine Education Loan Authority)
- Post Disbursement Destination:** Lender (dropdown), Destination ID: 1 (Maine Education Loan Authority)

The 'Build Options' section includes:

- Use CommonLine Version:** CL 4 (dropdown)
- Stafford App Form Default:** MPN (dropdown)
- Accept Change Records**
- Serial MPN Process Default:** Serial MPN (dropdown)
- Create CL Alt @4**
- Prom Note Delivery Default:** Paper (dropdown)
- Create CL Ref @5**
- Disb Hold/Release Default:** Release (dropdown)
- Create CL Ref Sup @7**
- Funds Return Method Code:** EFT (dropdown)

At the bottom of the form, there are buttons for 'Save', 'Return to Search', 'Notify', 'Add', and 'Update/Display'. A breadcrumb trail at the bottom reads: 'Loan Dest Profile | CommonLine Options | Loan Dest Edits'.

Step	Action
38.	Here is an example of the CommonLine Options page for an Alternative loan type.



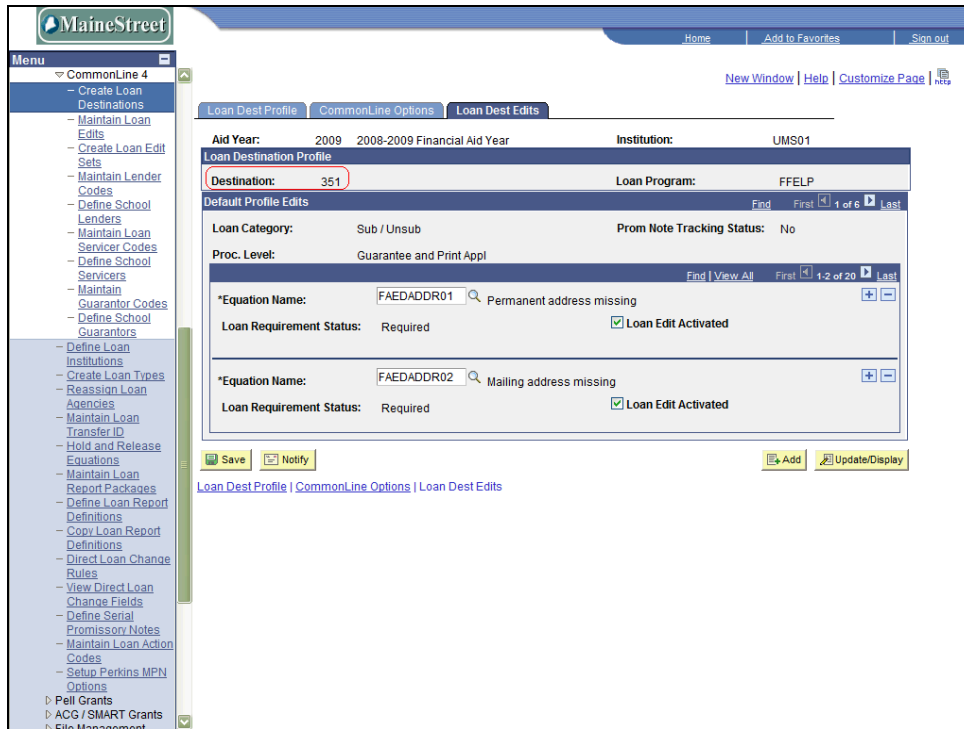
The screenshot displays the 'CommonLine Options' page in the MaineStreet system. The left-hand menu lists various administrative tasks such as 'Create Loan Destinations', 'Maintain Loan Edits', and 'Define Loan Institutions'. The main content area shows the following details:

- Header:** Loan Dest Profile | **CommonLine Options** | Loan Dest Edits
- Metadata:** Aid Year: 2009 2008-2009 Financial Aid Year; Institution: UMS07
- Loan Information:** Loan Destination Nbr: 287; Loan Program: Direct; Direct Loan Origination Center
- Change Transaction Destination:** Fields for Pre Disbursement Destination, Post Disbursement Destination, and Destination ID.
- Build Options:**
 - Use CommonLine Version: CL 4
 - Accept Change Records
 - Create CL Alt @4
 - Create CL Ref @5
 - Create CL Ref Sup @7
 - Stafford App Form Default: [Dropdown]
 - Serial MPN Process Default: [Dropdown]
 - Prom Note Delivery Default: Paper
 - Disb Hold/Release Default: [Dropdown]
 - Funds Return Method Code: EFT

Step	Action
39.	Here is an example of the CommonLine Options page for Direct Lending.
40.	Click the Loan Dest Edits tab. Loan Dest Edits
41.	The Loan Dest Edits page will be automatically populated with the default loan edits defined for the loan category and processing level for each loan type defined on the Loan Dest Profile page. You can use this page to add or modify the default loan edits.

Process Document


Financial Aid: Setting Up a Lender-090908

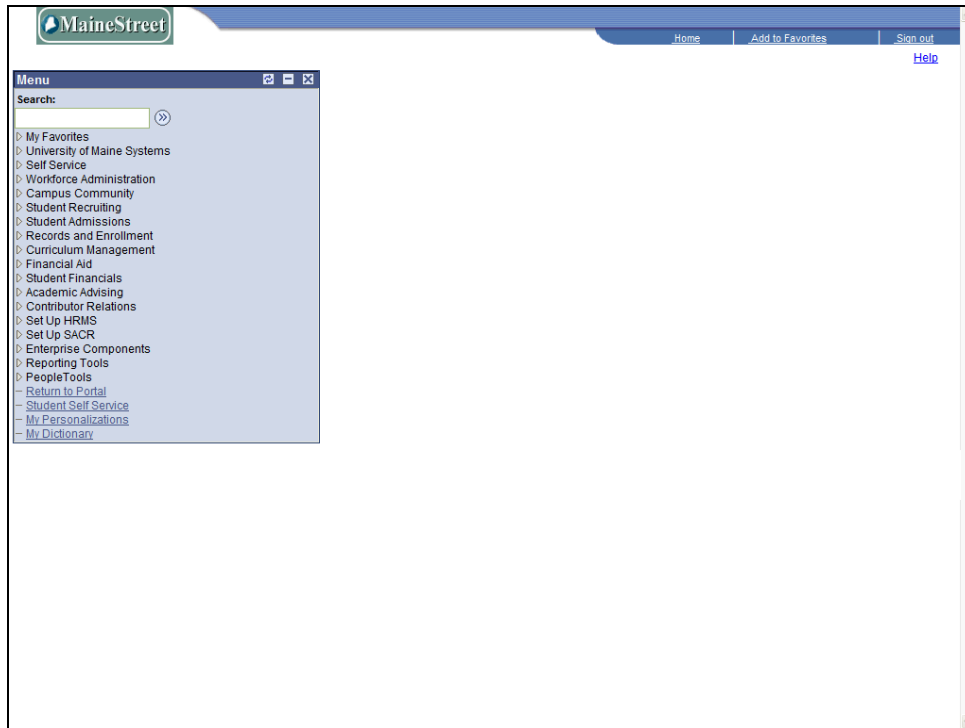


The screenshot shows the 'MaineStreet' application interface. On the left is a 'Menu' tree with various options like 'CommonLine 4', 'Create Loan Destinations', and 'Define Loan Institutions'. The main content area is titled 'Loan Dest Edits' and contains the following information:

- Aid Year:** 2009 (2008-2009 Financial Aid Year)
- Institution:** UMS01
- Loan Destination Profile:**
 - Destination:** 351 (highlighted with a red box)
 - Loan Program:** FFELP
- Default Profile Edits:**
 - Loan Category:** Sub / Unsub
 - Prom Note Tracking Status:** No
 - Proc. Level:** Guarantee and Print Appl
- Equation Name:** FAEDADDR01 (Permanent address missing) - Loan Requirement Status: Required, Loan Edit Activated
- Equation Name:** FAEDADDR02 (Mailing address missing) - Loan Requirement Status: Required, Loan Edit Activated

Buttons for 'Save', 'Notify', 'Add', and 'Update/Display' are visible at the bottom of the form.

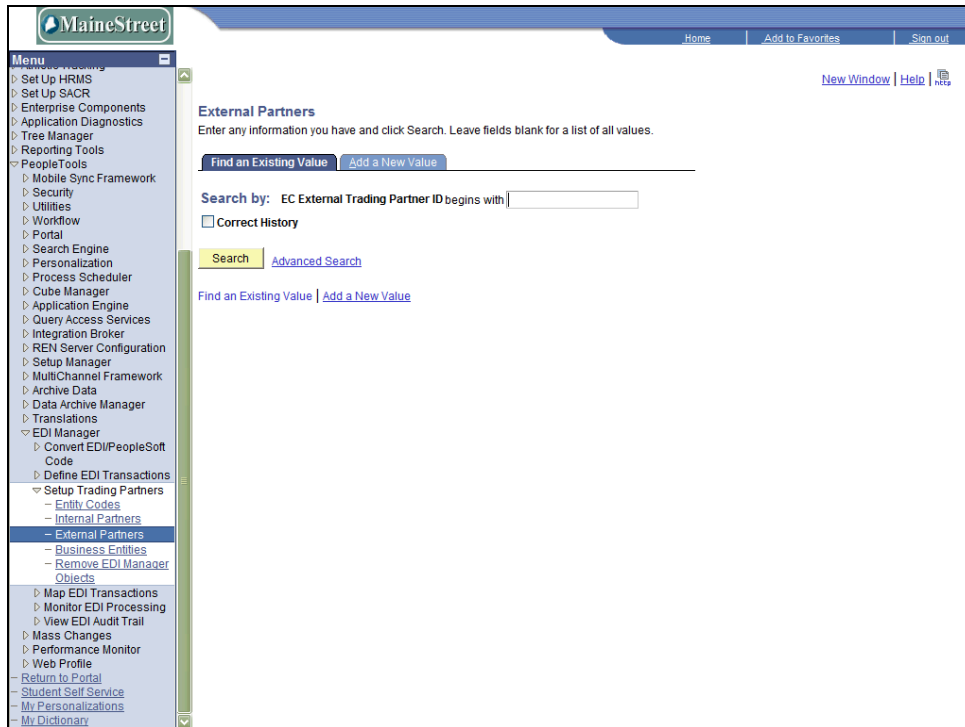
Step	Action
42.	<p>Note the Loan Destination number for use in the next step.</p> <p>Click the Save button.</p> 



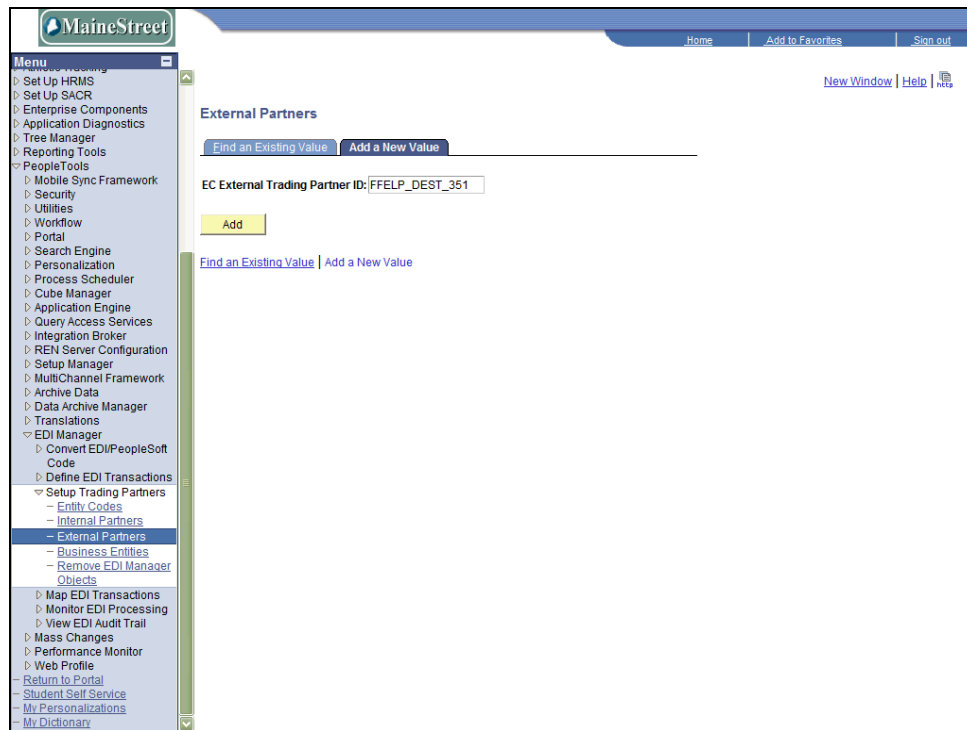
Step	Action
43.	The last step (for Alternative and FFELP) is the EDI setup. Navigate: PeopleTools > EDI Manager > Set up Trading Partners > External Partners.

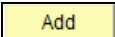
Process Document

Financial Aid: Setting Up a Lender-090908



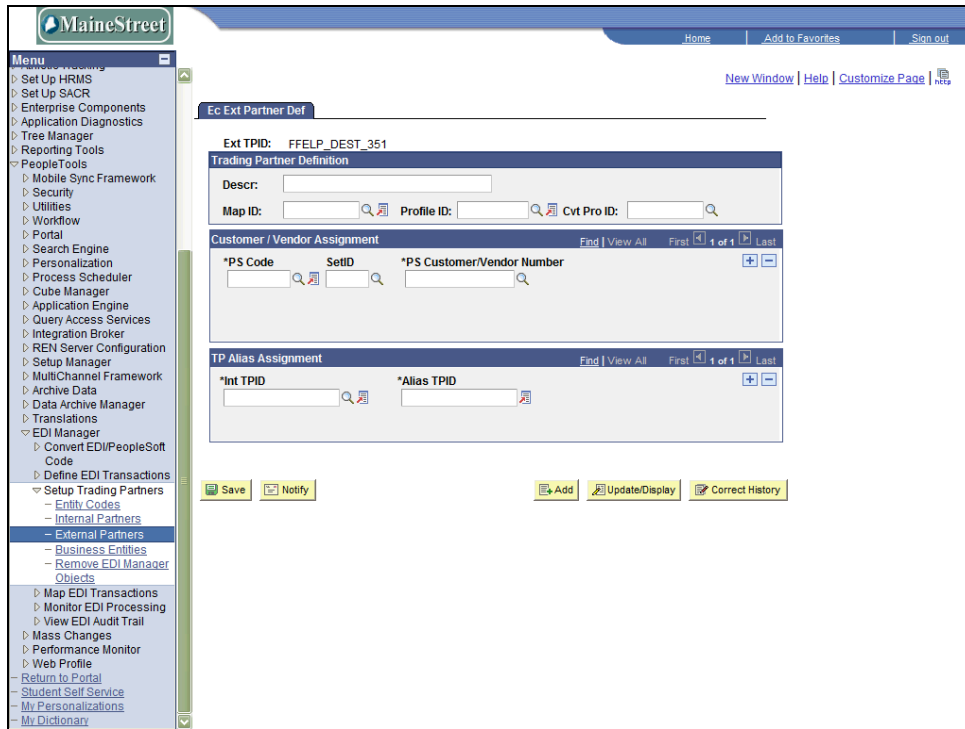
Step	Action
44.	Click the Add a New Value tab. Add a New Value
45.	The EC External Trading Partner ID must conform to the following rules: For Alternative lenders, use "ALT_DEST_num" where "num" is the Loan Destination Number. For FFELP, use "FFELP_DEST_num" where "num" is the Loan Destination Number.



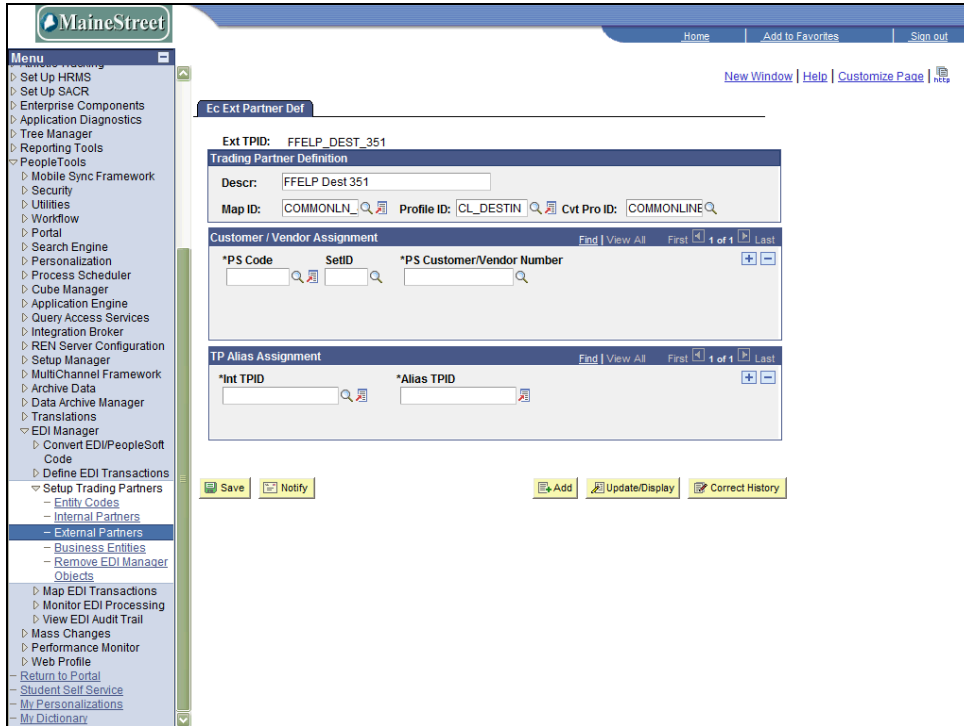
Step	Action
46.	Click the Add button. <div style="text-align: center; margin-top: 5px;">  </div>

Process Document

Financial Aid: Setting Up a Lender-090908




Step	Action
47.	Use the same ID (minus the underscores) in the Descr field.
48.	For the Map ID field, select <i>COMMONLN_4</i> . For the Profile ID field, select <i>CL_DESTIN</i> .



The screenshot shows the 'Ec Ext Partner Def' form in the MaineStreet application. The form is divided into three main sections:

- Trading Partner Definition:** Contains fields for 'Descr:' (FFELP Dest 351), 'Map ID:' (COMMONLN), 'Profile ID:' (CL_DESTIN), and 'Cvt Pro ID:' (COMMONLINE).
- Customer / Vendor Assignment:** Contains fields for '*PS Code', 'SetID', and '*PS Customer/Vendor Number'.
- TP Alias Assignment:** Contains fields for '*Int TPID' and '*Alias TPID'.

At the bottom of the form, there are buttons for 'Save', 'Notify', 'Add', 'Update/Display', and 'Correct History'. The left sidebar shows a menu with 'Setup Trading Partners' expanded to 'External Partners'.

Step	Action
49.	<p>For the Cvt Pro ID field, select <i>COMMONLINE</i>.</p> <p>Click the Look up PS Code button.</p> 

Process Document

Financial Aid: Setting Up a Lender-090908



MaineStreet

Home | Add to Favorites | Sign out

[New Window](#) | [Help](#) | 

Look Up PS Code


Search by: begins with

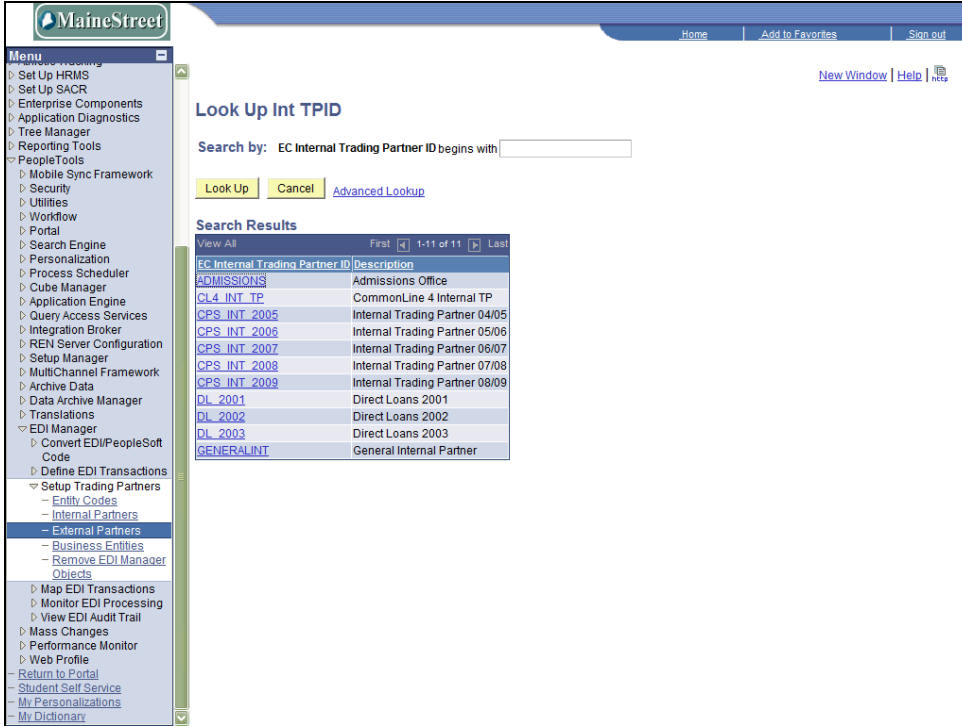
[Advanced Lookup](#)

Search Results

View All First 1-14 of 14 Last

PeopleSoft Entity Code	Description
ADAP	Admissions Applicant Processing
ADTR	Admission Transcript Process
APBU	Accounts Payable Business Unit
ARBU	Accounts Receivable Bus Unit
BIBU	Billing Business Unit
CUST	Customer
EMPL	Employee
FATP	Financial Aid Trading Partner
GENR	General EC Entity Code Table
INBU	Inventory Business Unit
LDST	Loan Destination
OMBU	Order Management Business Unit
PORU	Purchasing Business Unit
VEND	Vendor

Step	Action
50.	Select LDST . LDST
51.	Leave the SetID field blank. In the PS Customer/Vendor Number field, type in the Loan Destination Number.
52.	Use the look up button on the Int TPID field. 



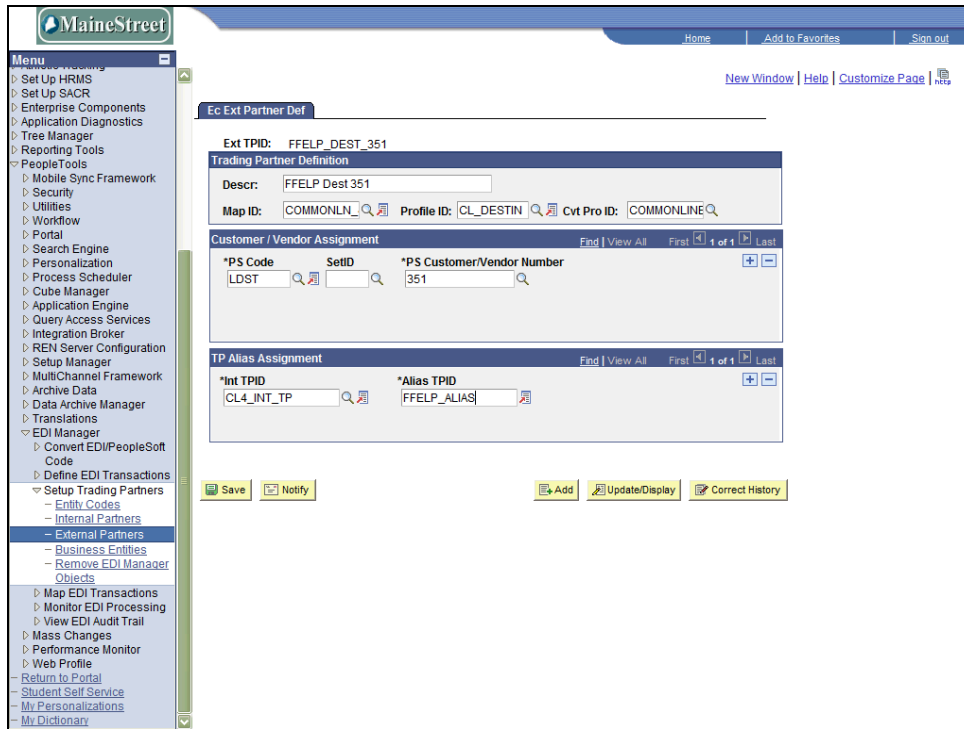
The screenshot shows the 'MaineStreet' application interface. The left-hand menu is expanded to 'Setup Trading Partners' > 'Internal Partners'. The main content area is titled 'Look Up Int TPID'. A search box contains the text 'EC Internal Trading Partner ID begins with'. Below the search box are buttons for 'Look Up', 'Cancel', and 'Advanced Lookup'. The 'Search Results' section displays a table with two columns: 'EC Internal Trading Partner ID' and 'Description'. The table contains the following entries:

EC Internal Trading Partner ID	Description
ADMISSIONS	Admissions Office
CL4_INT_TP	CommonLine 4 Internal TP
CPS_INT_2005	Internal Trading Partner 04/05
CPS_INT_2006	Internal Trading Partner 05/06
CPS_INT_2007	Internal Trading Partner 06/07
CPS_INT_2008	Internal Trading Partner 07/08
CPS_INT_2009	Internal Trading Partner 08/09
DL_2001	Direct Loans 2001
DL_2002	Direct Loans 2002
DL_2003	Direct Loans 2003
GENERALINT	General Internal Partner

Step	Action
53.	Select CL4_INT_TP CL4_INT_TP
54.	In the Alias TPID field, type in FFELP_ALIAS .

Process Document



Financial Aid: Setting Up a Lender-090908

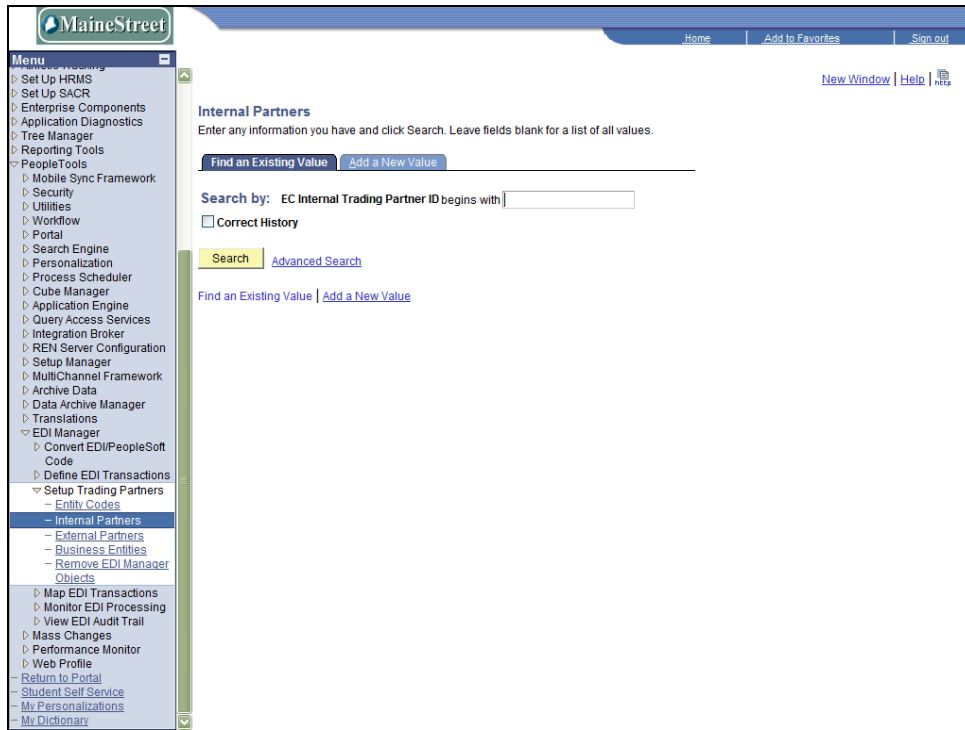


The screenshot shows the 'Ec Ext Partner Def' form in the MaineStreet application. The form is divided into three main sections:

- Trading Partner Definition:** Contains fields for 'Ext TPID' (FFELP_DEST_351), 'Descr' (FFELP Dest 351), 'Map ID' (COMMONLN), 'Profile ID' (CL_DESTIN), and 'Cvt Pro ID' (COMMONLINE).
- Customer / Vendor Assignment:** A table with columns for '*PS Code', 'SetID', and '*PS Customer/Vendor Number'. The entry shows 'LDST' for the code and '351' for the vendor number.
- TP Alias Assignment:** A table with columns for '*Int TPID' and '*Alias TPID'. The entry shows 'CL4_INT_TP' for the internal TPID and 'FFELP_ALIAS' for the alias TPID.

At the bottom of the form, there are buttons for 'Save', 'Notify', 'Add', 'Update/Display', and 'Correct History'. The 'Save' button is highlighted in yellow.

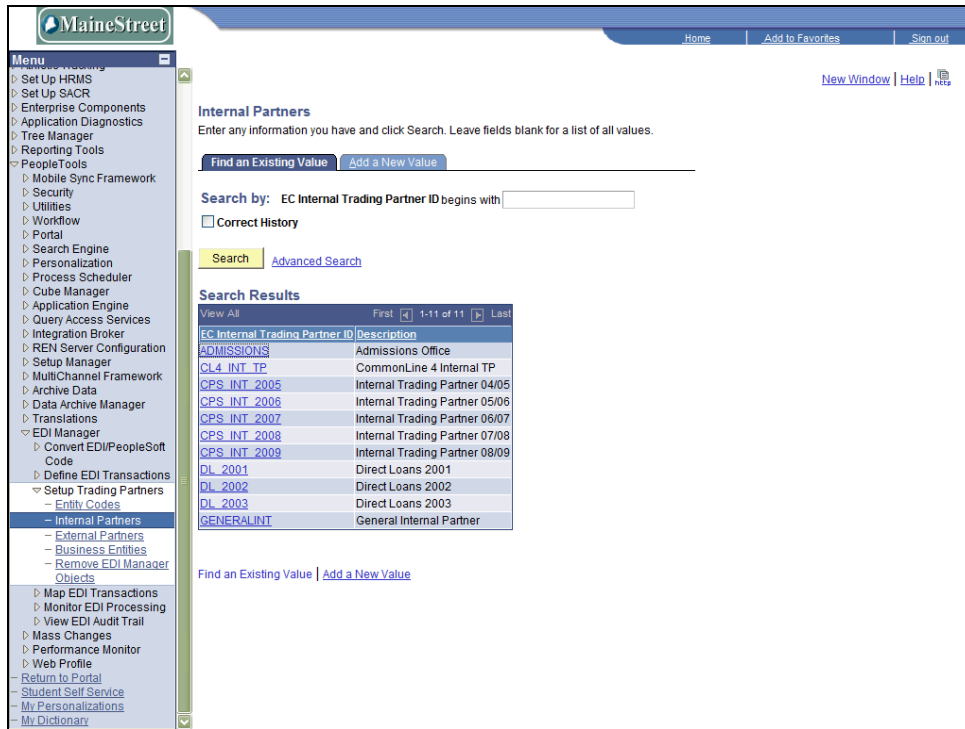
Step	Action
55.	Click the Save button. 
56.	To verify that the Internal Partner table was automatically updated, click Internal Partners in the menu. 



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

Process Document

Financial Aid: Setting Up a Lender-090908



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

[Find an Existing Value](#) [Add a New Value](#)

Search by: EC Internal Trading Partner ID begins with

Correct History

[Search](#) [Advanced Search](#)

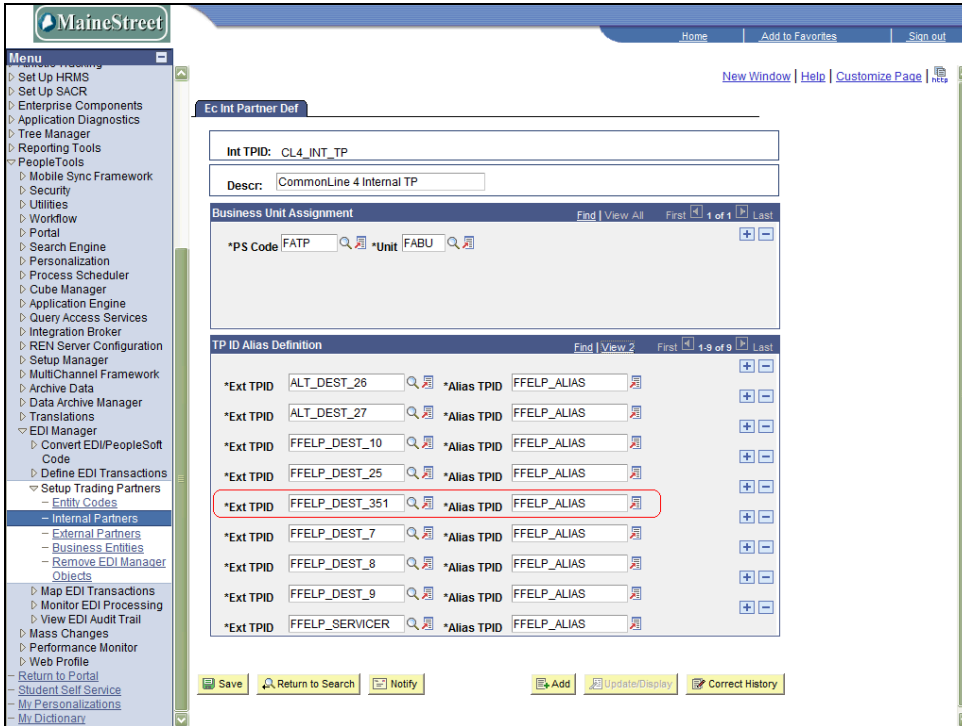
Search Results

View All First 1-11 of 11 Last

EC Internal Trading Partner ID	Description
AMMISSIONS	Admissions Office
CL4_INT_TP	CommonLine 4 Internal TP
CPS_INT_2005	Internal Trading Partner 04/05
CPS_INT_2006	Internal Trading Partner 05/06
CPS_INT_2007	Internal Trading Partner 06/07
CPS_INT_2008	Internal Trading Partner 07/08
CPS_INT_2009	Internal Trading Partner 08/09
DL_2001	Direct Loans 2001
DL_2002	Direct Loans 2002
DL_2003	Direct Loans 2003
GENERALINT	General Internal Partner

[Find an Existing Value](#) | [Add a New Value](#)

Step	Action
58.	Select CL4_INT_TP .



Ec Int Partner Def

Int TPID: CL4_INT_TP

Descr: CommonLine 4 Internal TP

Business Unit Assignment

*PS Code: FATP *Unit: FABU

TP ID Alias Definition

Ext TPID	Alias TPID
ALT_DEST_26	FFELP_ALIAS
ALT_DEST_27	FFELP_ALIAS
FFELP_DEST_10	FFELP_ALIAS
FFELP_DEST_25	FFELP_ALIAS
FFELP_DEST_351	FFELP_ALIAS
FFELP_DEST_7	FFELP_ALIAS
FFELP_DEST_8	FFELP_ALIAS
FFELP_DEST_9	FFELP_ALIAS
FFELP_SERVICER	FFELP_ALIAS

Buttons: Save, Return to Search, Notify, Add, Update/Display, Correct History

Step	Action
59.	Click View All to see the list of TP ID Alias Definitions. Your new external trading partner should appear in the list.
60.	End of Procedure.