To meet the requirements outlined in Gen 13-13 (http://www.ifap.ed.gov/dpcletters/GEN1313.html), our fall only loans, spring only loans and fall/spring loans initially need to have Academic Year dates that reflect the August – May period. If a student is awarded a summer loan, we need to change the Academic Year dates on the summer only, fall only, spring only, or fall/spring loans to reflect the August to August period.

If a student’s summer loans are all cancelled, the Academic Year end date on the fall only, spring only or fall/spring loans need to be changed back to May.

Our default Academic Year set up has been changed to reflect May end dates so all loans (including summer) will originate with August to May Academic Year dates.

Between the time the loan originates and the time it is sent to COD (i.e., you run the DLOUT process), the Academic Year end dates on these loans need to be adjusted. One way to do that is with Population Update and Process Loan Dates. Alternatively, for a single student you could manually adjust the dates on the Override Loan Application Data page and click on the Activate Change Button on Manage Direct Loan Application.

In either case, run Process Loans and DLOUT to transmit the file.

Some schools are having issues after putting multiple careers on the same run control for Process Loan Dates. We now recommend separate run controls for each career.

Here are the details for batch processing of originated summer loans.

- The first step is to update the Offer Activity Indicator so the originated academic loans will re-originated.
- The second step is to update the loan end dates on the previously originated loans.
- Lastly, run origination and outbound the loans.

<table>
<thead>
<tr>
<th>Set Up SACR &gt; System Administration &gt; Utilities &gt; Population Update &gt; Population Update Process</th>
</tr>
</thead>
<tbody>
<tr>
<td>When a student has a new summer loan, use the Query NDU_FA_OAI_ADD to identify the academic year loans that need to be adjusted.</td>
</tr>
</tbody>
</table>
| *Record (Table) Name*: STDNT_AWARDS  
*Selection Tool*: PS Query  
*Query Name*: NDU_FA_OAI_ADD.  
*Edit Prompts*: Enter Institution, Aid Year and Career.  
*Field Name*: Offer Activity  
*Field Value*: Adjustment |

The process updates the Offer Activity Indicator (OAI) to signal the loan origination process that this loan must be re-originated to pick up the new dates.

It has to be run before the dates are changed, as the query is looking for
You may use the Preview Selection Results link to see who will be modified.

When all the summer loans for a student have been canceled, the Query NDU_FA_OAI_DELETE will identify academic year loans that need to be adjusted.

*Record (Table) Name: STDNT_AWARDS
Selection Tool: PS Query
Query Name: NDU_FA_OAI_DELETE.
Edit Prompts: Enter Institution, Aid Year and Career.
Field Name: Offer Activity
Field Value: Adjustment

The process updates the Offer Activity Indicator (OAI) to signal the loan origination process that this loan must be re-originated to pick up the new dates.

It has to be run before the dates are changed, as the query is looking for loans with incorrect dates.

On the Process Scheduler Request (which appears after you select the RUN button), select SCC_POP_IPD.
Financial Aid > Loans > Process Loan Dates

When a student has a new summer loan, use the Query *NDU_FA_SUMMER_LN_ADDED*.

**Selection Tool:** PS Query  
**Query Name:** *NDU_FA_SUMMER_LN_ADDED*  
**Edit Prompts** link: enter the appropriate *Academic Year*, *Institution* and *Career* to be used by the query.

In the **Select Values to Update** area, enter the *Disbursement Plans* that will need to have their Academic Year End dates changed, and the new *Acad Year End* date that needs to be used (normally an August date).

Leave Blank: *Loan Process State*, *Loan Process End*, *Acad Year Start*.

Add a run control for each career you need to process.

You may use the **Preview Selection Results** link to see who will be modified.

When all the summer loans for a student have been canceled, a different query will identify loans that need to be adjusted.

**Selection Tool:** PS Query  
**Query Name:** *NDU_FA_SUMMER_LN_DELETED*  
**Edit Prompts** link: enter the appropriate *Academic Year*, *Institution* and *Career* to be used by the query.

In the **Select Values to Update** area, enter the *Disbursement Plans* that will need to have their Academic Year End dates changed, and the new *Acad Year End* date (normally a May date)

DO NOT WANT INCLUDE ROWS FOR SUMMER TERMS.

Leave Blank: *Loan Process State*, *Loan Process End*, *Acad Year Start*.

Add a run control for each career you need to process.
You may use this screen if you want to verify that the Academic Year End dates have been correctly modified.

Run loan origination so the academic year loans will re-originate with the updated year end dates.

Outbound the summer and academic year loans.
Here are the steps to modify a single student. Run loan origination and outbound the loans.

**Financial Aid > Loans > Direct Lending Management > Override Loan Application Data, Direct Loan Demo Ovrd**

Use this screen if you want to modify the Academic Year End date for a single student.

Financial Aid > Loans > Direct Lending Management > Manage Direct Loan Application, Application Acknowledgement

Click *Activate Change* button.
<table>
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<th>Financial Aid &gt; Loans &gt; Process Loans</th>
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</tbody>
</table>

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<tr>
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<tr>
<td><img src="image1.png" alt="Loan Origination Image" /></td>
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<tr>
<th>Financial Aid &gt; File Management &gt; COD_Full Participant &gt; Generate Direct Loan Data</th>
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<thead>
<tr>
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<tbody>
<tr>
<td><img src="image2.png" alt="Direct Loan Outbound Image" /></td>
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