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North Dakota University System
Campus Solutions – Financial Aid
Direct Loans Set Up

Resources

U. S. Department of Education
The Department of Education provides instruction for schools on how to apply to participate in the Direct Loans program at http://www.ed.gov/offices/OSFAP/DirectLoan/newtoDL.pdf


Student information about MPNs is available at: https://studentloans.gov

G5
Your campus will need to:
  o Provide G5 with your DL bank account information at www.g5.gov
  o Submit a new direct deposit form to receive Direct Loan funds even if you will use the same bank account as your other Title IV funds.

COD/SAIG
Ensure you are fully set up at www.cod.ed.gov (see HEUG webinar mentioned below)
Confirm your SAIG enrolment for DL at www.fsawebenroll.ed.gov

HEUG
The powerpoint file “Transitoning to DL – Setup Outside PS” is available at http://www.heug.org/p/do/sd/sid=10211&type=0 for information on updating SAIG and COD. It shows examples of how your set up should look and advises which reports to request.

Other powerpoint presentations and some recordings can be found on the HEUG web site by going to Files > Campus Solutions > Financial Aid. Look for the subtopic of “Loans: Direct Loans”.

National Direct Student Loan Coalition
You can sign up for the National Direct Student Loan Coalition listserv by following the instructions at http://www.directstudentloancoalition.org/media/pdfs_autogen/Dirloan2.pdf.

Viewing the Direct Loan Application Component: http://upk.cnd.nodak.edu/PlayerPackage/tpc/a2dd9842-fa1a-4108-95da-a817cd20a77a/topic.html?su=mode=S/0026CTXEX=/0027PST8$P25000/0027-/0027PST8$P$005BSEARCH$005D/0027.

Viewing a Direct Loan Promissory Note: http://upk.cnd.nodak.edu/PlayerPackage/tpc/86bff915-bfdd-4d09-aaab-8aa0165af49/topic.html?su=mode=S/0026CTXEX=/0027PST8$P25000/0027-/0027PST8$P$005BSEARCH$005D/0027.

Generating a Direct Loan Validation Errors Report: http://upk.cnd.nodak.edu/PlayerPackage/tpc/76cd84fd-6a89-4c11-a228-a913c0cc17b8/topic.html?su=mode=S/0026CTXEX=/0027PST8$P25000/0027-/0027PST8$P$005BSEARCH$005D/0027.

COPY Feature
Many of our screens have a COPY button that will be useful in your set up.
  • Generally, to use the copy button, go to the screen you want to copy from and push the COPY button.
  • Fill in the appropriate boxes in the Copy To section of the sub-screen and select OK, and you will be brought back to the original screen you copied from.

06/07/2019
SAVE before leaving the original screen. This SAVE actually creates the new screen.
Navigate to your new screen to make any adjustments.

**Item Type Numbering**

Use the following pattern as you need to set up Item Types. The Late Summer item types are needed because fees may be different after 1 Jul of each year, and they cannot be changed on the existing item type. You will need to judge from past experience how many item types to set up initially.

Before aid year rollover in Jan 2010 for AY 2011 (and before the “P over Q” that will happen at the end of fall 2010), each school will want to create, at minimum, late summer item types for use in Summer 2010 after 1 Jul 2010. If you also set up the sub/unsub item types for packaging before the P over Q, then they will be available in Stage for testing during the Spring.

- **DL Subsidized Stafford**
  - 911000002100
  - 911000002110
  - 911000002120
  - 911000002180 (Before Sequestration)
  - 911000002190 (Before Sequestration)
  - 912000002180 (After Sequestration)

- **DL Unsubsidized Stafford**
  - 911000002200
  - 911000002210
  - 911000002220
  - 911000002280 (Before Sequestration)
  - 911000002290 (Before Sequestration)
  - 912000002280 (After Sequestration)

- **Federal DL Perkins (Number reserved for future setup)**
  - 911000002300
  - 911000002310
  - 911000002380 (Before Sequestration)
  - 912000002380 (After Sequestration)

- **Fed Parent PLUS**
  - 911000002500
  - 911000002510
  - 911000002520
  - 911000002580 (Before Sequestration)
  - 912000002580 (After Sequestration)

- **Fed Grad PLUS**
  - 911000002600
  - 911000002610
  - 911000002680 (Before Sequestration)
  - 912000002680 (After Sequestration)

Schools will need to update their COD set up to activate eMPNs and to have COD mail MPNs to students where appropriate (see Resources above).

Schools may need to update their SAIG Enrollment to receive the monthly SAS report through SAIG TG52501 (See page 39)
Campus Solutions Set Up
The following set up was done globally for all schools by Campus Solutions. It is included here as a record for future troubleshooting.

Set Up Message Classes
Campus Solutions will need to add the following to the file handler set up:

- CRCO##OP  Credit Decision Override*
- CRPN##OP  MPN Response*
- CRBN##OP  Booking notification*
- CRPS##OP  Payment Servicing*
- CRND##OP  Negative Disbursement (send to MoveIt Reports folder)
- CRWB##OP  Responses to COD Web Site activity (send to MoveIt Reports folder)
- DSDF#OP  Import School Account Statement (Disbursement level detail)
- DSLF##OP  Import School Account Statement (Loan level detail)
- CRECMYOP  DL Entrance Counseling Acknowledgement
- CRSP##OP  DL PLUS Electronic Application (send to MoveIt Reports folder)

*Needs to be added to run control at Production Control (Financial Aid > File Management > COD Full Participant > Import COD Response Data)

Set Up Lender

<table>
<thead>
<tr>
<th>Set Up SACR &gt; Product Related &gt; Financial Aid &gt; Loans &gt; CommonLine 4 &gt; Maintain Servicer Codes</th>
</tr>
</thead>
<tbody>
<tr>
<td>This page is delivered</td>
</tr>
</tbody>
</table>

Servicer Load Maintenance

<table>
<thead>
<tr>
<th>Destination OE Code</th>
<th>Branch</th>
<th>Description</th>
<th>Short Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>0000000</td>
<td>0000</td>
<td>Direct Loan Servicer</td>
<td>DL Servicer</td>
</tr>
</tbody>
</table>

Address Information

- **Country:** USA, United States
- **Address:** 474 S. Court Street, Suite 400, Montgomery, AL 36104-4102

Mailbox ID: loan_2200100500@education.com  Load Time: 
Mailbox Type: Internet

06/07/2019
Set Up SACR > Product Related > Financial Aid > Loans > Maintain Loan Transfer ID

Campus Solutions will review this up to ensure that the Statement of Account Report loads properly.

Set Up SACR > Product Related > Financial Aid > Loans > CommonLine 4 > Define School Servicers

This page will be completed by Campus Solutions.

Set Up SACR > Product Related > Financial Aid > Loan > CommonLine 4 > Create Loan Destinations

Set up the Loan Print Options to
Campus Solutions will add a row and change the Loan Program for all Sub and Unsub Aggregate Aid Limits.

Aggregates
Set Up SACR > Product Related > Financial Aid > Awards > Aggregate Aid Limits
School Set Up

Set Up Loan Institution

Complete this screen for each career.

On the second tab, add a row for the “Direct” Loan Program.

---

**Institution** | **DL School Code** | **COD Common School ID**
---|---|---
BSC01 | G02988 | 18740362
DSU01 | G02989 | 47706821
LRSC1 | G02991 | 68323966
MASU1 | G02993 | 38688400
MISU1 | G02994 | 56037846
MISUB | G02995 | 76652635
NDSCS | G02996 | 39060065
NDSU1 | G02997 | 79909520
UND01 | G03005 | 75658862
VCSU1 | G03008 | 39119698
WSC01 | G03007 | 30638165
Set Up Fee

**Setup SACR > Product Related > Financial Aid > Awards > Loan Fee Setup**

Because the Budget Control Act of 2011 (the sequester law) remains in effect, this announcement provides information regarding sequester-required changes to Direct Loan fees and sequester-required changes in the percentage reduction that institutions must apply to awards in the Iraq-Afghanistan Service Grant and TEACH Grant programs where the first disbursement is on or after October 1, 20xx.

Set up details can be found at:


Whenever you set up a new DL Loan item type, add/update the following:

- SF Item Type
- FA Item Type
- Fiscal Item Type
- Disbursement Rules
- Loan Type Table
- Return of Title IV
- Right to Rescind

Here are the details:

**Set Up SF Item Type**

The effective date must be after the date of the Loan Fees, but no later than the 1 July of the first year you will use the item type.
Set the Maximum Transaction Amount to be consistent with your FFEL loans of the same type. This is the largest amount that will be passed to the Business Office for disbursement.

Be consistent in your set up with other Title IV Aid.

Each school has different Account Types in use. Set your Account Types to be consistent with your other Title IV Aid.

Coordinate with your Finances and/or
Business Offices about whether you need specific Accounts set up for Direct Loan funds. Use the GL Interface numbers provided by your local campus.

Set Up FA Item Type

You can COPY from your existing FFEL item types, then make Description, Fee, Disbursement Plan and Loan Fee updates.
Be sure to mark Truncate Fees.

Enter a row for each Career at your institution that will be

This example is from a two year school, so the maximum amount is half of $4500. The amount used for a four year institution would be half of $5500, or half of $8500 if the school has graduate programs.
awarded this item type.

On the last tab, the Loan Program comes from the Aggregate Area set up.

Ensure the loan fees are entered with the Origination first, then the Rebate.

Changes to Loan Fees are effective 1 Jul; if they change, a new item type has to be used, since the fees cannot be changed once an item type has been used.
### Set Up Fiscal Item Types

**Setup SACR > Product Related > Financial Aid > Awards > Fiscal Item Types**

Create Fiscal Item Types for each new item type.

<table>
<thead>
<tr>
<th>SetID: MSLUB</th>
<th>Item Type: 912000002100 DL Sub Stafford #1 + Late Summ</th>
<th>Aid Year: 2019 Federal Aid Year 2009-2010</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><strong>Max to Offer</strong></td>
<td><strong>Max to Accept</strong></td>
</tr>
<tr>
<td></td>
<td>$999,999,999,000</td>
<td>$999,999,999,000</td>
</tr>
<tr>
<td></td>
<td>13,750,000</td>
<td>13,750,000</td>
</tr>
<tr>
<td></td>
<td>5,000,000</td>
<td>5,000,000</td>
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<tr>
<td></td>
<td>8,750,000</td>
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</tr>
<tr>
<td></td>
<td>999,991,249,000</td>
<td>999,991,249,000</td>
</tr>
<tr>
<td></td>
<td>3</td>
<td>3</td>
</tr>
</tbody>
</table>

### Set Up Disbursement Rules

**Setup SACR > Product Related > Financial Aid > Disbursement > Define Item Type Rules**

Create Disbursement rules for each new item type. They should be the same as for your existing Stafford item types.

You may **COPY** from your existing FFEL item type disbursement rules.
Set Up Loan Types

Create a Loan Type for each loan. Do not set up sets of loans. There needs to be independent loan types for sub and unsub loans. You may want to use DLS1 (sub), DLU1 (unsub), DLP1 (Parent PLUS), DLG1 (Grad Plus), DLK1 (Perkins), DLS2, DLU2, etc.

Use NSLDS Loan Type D1 for Sub, D2 for Unsub Stafford, D3 for Direct Grad Plus, D4 for Parent PLUS.

You have several options here as to when the system should allow disbursements to the student’s account and when you want to allow transmission to COD.

This allows the loan to disburse after you receive the Promissory Note Acknowledgement. The system will transmit a disbursement file to COD only after you have received both an Origination Acknowledgement and a Promissory Note Acknowledgement from COD.
If you feel a need to assign a checklist to Stafford or PLUS loans, it would be done on the last tab. No checklists have been set up specifically for Direct Lending. If you feel a need for checklists, contact Campus Solutions.

Set up for Return of Title IV

Click the **Auto Populate** button to have the system find and add your new Title IV item types.

Set up Right to Rescind Letter

The person in your office who runs the Right to Rescind process needs to add the new item types to their set up.
### Update Award Messages

<table>
<thead>
<tr>
<th>Setup SACR &gt; Product Related &gt; Financial Aid &gt; Awards &gt; Award Messages</th>
</tr>
</thead>
<tbody>
<tr>
<td>Review any award messages for PLUS, Sub and Unsub to ensure the language is appropriate for Direct Loans. Award messages are displayed both in Self Service and on paper award letters.</td>
</tr>
</tbody>
</table>

The complete text used here is:

**STAF:** As a first time borrower you must complete the Federal Stafford Master Promissory Note at [https://dlenote.ed.gov/empn/index.jsp](https://dlenote.ed.gov/empn/index.jsp) and complete entrance counseling at [https://www.dl.ed.gov](https://www.dl.ed.gov) in order to receive loan funds. You must be enrolled in at least 6 credit hours per semester to receive the loan funds. The loan disclosure statement from the lender will reflect exact disbursement amounts.

**UNSB:** You will pay interest on this loan while you are enrolled. Please take time to determine whether or not you really need this loan and consider all previous debt before accepting. at [https://dlenote.ed.gov/empn/index.jsp](https://dlenote.ed.gov/empn/index.jsp) and complete entrance counseling at [https://www.dl.ed.gov](https://www.dl.ed.gov) in order to receive loan funds. You must also be enrolled in at least 6 credit hours per semester to receive the loan funds. The loan disclosure statement from the lender will reflect exact disbursement amounts.
Set Up Change File Exceptions

All demographic and loan related changes will automatically be sent as a change unless specifically selected here. Several existing DL schools have confirmed with ED that address changes do not need to be reported. Eliminating these changes will reduce the number of Change Files you will need to deal with, and which might cause a disbursement delay.
Set Up SACR > Product Related > Financial Aid > Loans > Define Loan Counseling Options

On tab 2, update the URL for Stafford and Grad PLUS loans from Mapping Your Future to the Dept of Education web site; the DOE will send us a file we can load reflecting students who have completed Entrance Counseling for Stafford loans. As of this writing, Grad PLUS counseling files do not load in CS V9.0.:

For Stafford and Grad PLUS entrance counseling, use:  https://studentloans.gov (PIN Required)

For Exit Counseling, use:  https://www.dl.ed.gov/borrower/BorrowerLogin.jsp (PIN Required)

Set Up SACR > Product Related > Financial Aid > Loans > Set DL Counseling Search

Add a new value for your institution. Use Search Parameter NDUSFASRCHMATCH, which is what we use for ISIR load.

Ensure the radio button at One Match is set to Update.
### Turn off Self Service Lender

**Set Up SACR > Definitions > Self Service > Financial Aid > Self Service Options**

<table>
<thead>
<tr>
<th>Turn off lender selection for 2011.</th>
</tr>
</thead>
</table>

![Image](https://example.com/image1.png)

### Packaging Plan

**Set Up SACR > Product Related > Financial Aid > Awards > Packaging Plan**

<table>
<thead>
<tr>
<th>(Do for 2011 only unless you have summer packaging plans) Add a row before starting. For 2011, change the FFEL item types in your packaging Plans to the DL Item Types you’ve created.</th>
</tr>
</thead>
</table>

![Image](https://example.com/image2.png)

On the last tab, check that the Award Action and Disb Plan are correct.