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ELECTRONIC LOAN PROCESSING

WEEK 2 - APPLICATION PROCESSING

During this week of training, we'll lead users through a discussion and "show & tell" of how electronic loan applications are created and extracted in the Banner Financial Aid System. We'll be using the Banner 3.X database. Each user should login to his/her college's DEVL 3.X database. After our discussion and demonstration, each user will be able to create and extract the college's loan applications while testing the loan setup completed in last week's training session.

1. RRAAREQ - Applicant Requirements Tracking Form. For each student, you must satisfy all tracking requirements that would prevent packaging of the student loan.
2. RPAAWRD - Award Form. Award loan(s) to student. Loans must be in an "accept" status to create an electronic application. Banner awards loans based on "year in college" from RNANA01.
3. RPRELAP - Electronic Loan Application Process. Electronic loan applications must be created on-line ("Create App" button on RPAAWRD/ROARMAN, for instance) or in batch through the job submission control form, GJAPCTL. Both methods invoke the RPRELAP loan creation process. You created your user-defined parameters for either batch or on-line processing last week during the loan setup session. Regardless of which option you choose (and you can choose whichever option suits you on a particular day), you must review manually each loan application and mark it "R" (Ready to Send) before the RWPXF01 process will create and extract a loan application file. For demonstration purposes, we'll first create loans in batch using the RPRELAP process. Then we'll review the output report entitled "Electronic Loan Application Record Creation Log" and discuss

its use. Next we'll demonstrate the dynamic, on-line use of RPRELAP process while in the RPAAWRD form of a student financial aid record.

4. RPAELAP - Electronic Loan Application Form. The loan application form is created as a result of running the RPRELAP process - either on-line or in batch. RPAELAP displays the latest loan application first. Arrow down to see additional applications. Review and modify information as necessary. For instance, here's where you can make changes to the default lender/guarantor, loan period, requested amount, and the like. When you determine the loan application is ready for "creation and extraction" by the RWPXF01 process, change the APPL STATUS on page 1 to "R" for "Ready to Send."

5. RWPXF01- Electronic Loan Process #1. From job submission, RWPXF01 will create and extract a loan application extract file in CommonLine 4 format. The only parameter for RWPXF01 is parameter 01 where the user inputs the aid year, i.e. 0001. RWPXF01 creates an output file named ELAP01IN_seq#.dat and automatically moves the file to the user's PROD/LOANS/APPS folder on the college share on the CTCROBUSTA file server. The end user must now use 3rd party software (web, FTP, pop3 mail) to transmit this file from the file server to the 3rd party vendor. RWPXF01 will also create a report of the loan extract activity and automatically place this report in the college's PROD/Reports folder on the college's share of the file server. This report follows our naming convention. i.e. 0001_LOAN_EXTRACT_ddmmyy_seq#.doc.

6. RPIBATC - Loan Batch Control Form. Here you can view the record of your CommonLine batches. For instance, input "L-Electronic Loan" in the "Main Type" field and "@-Elect Loan App" in the "Sub Type" field to generate a list of your electronic loan batches.

7. RPAELAP - Electronic Loan Application Form. Revisit RPAELAP and review the updates to the loan application brought about by the

RWPXF01 process. Note that APPL STATUS has changed to "S" for "Sent." Note submission date, loan IDS, batch Ids, and the like.

8. This completes the "show & tell" part of week 2 of your Electronic Loan Training. Now it's time for you to test these processes yourself in your DEVL 3.X database. To begin your testing, you may want to generate an "Applicant Award Report (RPRAWRD)" from your database to see if you have offered any subsidized, unsubsidized, or PLUS loans to students. (Remember that DEVL 3.X is a "refresh" of PRODUCTION data as of July 29, 2000). Good Luck!