

Understanding Certification Requests

In this chapter we will look at how to respond to certification requests from lenders.

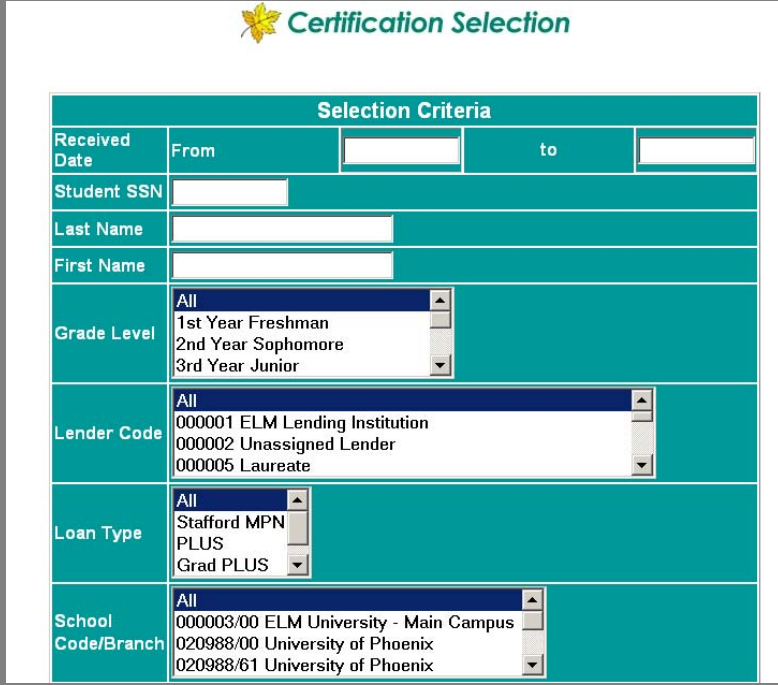
Certification requests are requests from a lender to a school to confirm a student's eligibility for a loan. When a school completes the certification section of a borrower's loan application they are confirming the borrower's eligibility for the loan. The school confirms that the student is enrolled at least half-time at the school, and meets all other eligibility requirements for the loan.

Viewing Certification Requests

To view certification requests:

1. From the **Function Selection** menu, click on **Certification Requests**.

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The screenshot shows a web interface titled "Certification Selection" with a yellow leaf icon. Below the title is a "Selection Criteria" form with the following fields:

Selection Criteria	
Received Date	From <input type="text"/> to <input type="text"/>
Student SSN	<input type="text"/>
Last Name	<input type="text"/>
First Name	<input type="text"/>
Grade Level	All 1st Year Freshman 2nd Year Sophomore 3rd Year Junior
Lender Code	All 000001 ELM Lending Institution 000002 Unassigned Lender 000005 Laureate
Loan Type	All Stafford MPN PLUS Grad PLUS
School Code/Branch	All 000003/00 ELM University - Main Campus 020988/00 University of Phoenix 020988/61 University of Phoenix

2. The **Certification Selection** page will appear. This page allows you to select to view certification requests by:
 - Date range
 - Student Social Security number
 - Student name
 - Grade level
 - Lender code
 - Loan type
 - School code or branch
 - Status
3. The **Certification Selection** page will also let you sort by student name, student Social Security number, date, loan type, lender code and status, grade level or a combination of these factors.
4. Click **Select**.

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Certification Request Processing

SSN	Student Name	Grade Level	Loan Type	Requested Loan Amount	Received/Updated Date	Lender Name	Lender Code	Lender Expiration Date	School Code	Status	Select
878-06-1146	TEST, ALT STU A	1st Year Freshman	ALT	\$19,000.00	04/07/2009	Suntrust	811304		000003-00	Cert Req Partially Saved	<input type="checkbox"/>

Back Next List Previous List Generate Report Delete Selected Reject Selected Select All

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Delete Selected will delete the selected records.

Reject Selected will reject the selected records, and send an @1T record to the lender.

5. The **Certification Request Processing** page appears. This page will allow you to view and work with individual certification requests.

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Completing Certification Requests

To complete certification requests:

1. Click on the Social Security number hyperlink in the **SSN** column for the certification request you wish to view.

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Alternative Certification Request

Program Information

Program	Alternative - CLC Premier Loan	Guarantor Code	200 - COLLOANG
Lender Code/Branch	811304 00	School Code	000003-00
Lender Name	Suntrust		
Credit Expiration Date		Status	Cert Req Partially Saved

Borrower Information

Borrower Name	DOE, JOHN A.	SSN	888-08-1195
Street Address	123 MAIN STREET	Address #2	SUITE 100
City/State/Zip	OAKLAND, CA 94501-1122	Foreign Postal Code	
Foreign Prefix/Telephone	510-555-1212	Date of Birth	03/23/1978
Legal Residence			
Driver's License	40		
E-Mail Address			
Requested Amount \$	\$1		
Citizenship Status	C		
Outstanding Loans	Ye		
Borrower Credit Auth. Code	Ye		
Alien ID #			

School Information

Loan Period	08/01/2008 to 05/12/2009	Grade Level	1st Year Freshman
Enrollment Status	Full <input type="radio"/> Half <input type="radio"/> Less Than Half Time <input type="radio"/>	Completion Date	
Cost of attendance	\$ 0	Estimated Financial Aid	\$ 0
Alternative Certified Amount	\$	Certified Date	
Disbursement Date #1	08/01/2008	1st Disbursement Hold/Release	Release
Disbursement Date #2	01/10/2009	2nd Disbursement Hold/Release	Release
Disbursement Date #3		3rd Disbursement Hold/Release	Release
Disbursement Date #4		4th Disbursement Hold/Release	Release
Disbursement Amount #1		Disbursement Amount #2	
Disbursement Amount #3		Disbursement Amount #4	
Processing Type	Certification Request	School Unique Loan ID	TESTING 123
Promissory Note Delivery Method	Print		
EFT	Yes <input checked="" type="radio"/> No <input type="radio"/> Default <input type="radio"/>	Yes <input type="radio"/> No <input type="radio"/>	
Receive Date	04/07/2009	Last Update Date	04/07/2009
Approved Amount	\$19,000.00		

Buttons: Accept Save Delete Reject Clear Back Select Default Apply Defaults Manage Defaults

Callout 1: When you enter a date into the **Date of Birth** field, if the date is less than 17 years ago, or more than 100 years ago, you will receive a warning message. Click **OK** to accept the date if it is accurate. The system will not accept a date before 1900.

Callout 2: This is a required field. You can select **E** – email, **P** – Print, or **W** – web.

2. The certification request for the student will appear. Required fields are outlined in red.

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3. Complete the information requested on the certification request.
4. Click **Accept**.

Creating Multiple Defaults

You can create up to twenty default sets in the **Certification Requests** function, for different loan periods, disbursement dates, or codes. For example, you could have a default set for fall semester, or for freshman applications.

To create a new default set:

1. From the **Function Selection** menu, select **Certification Requests**.
2. Scroll to the bottom of the page.
3. At the bottom of the page you will see the **Select Default** drop-down list, the **Apply Defaults** button, and the **Manage Defaults** button.
4. Click the **Manage Defaults** button.
5. Click the **New Default Set** button.
6. The **Default Details** page will appear.
7. Enter a name for this default in the **Name of Default Set** field.
8. In the **Loan Information** section, you can enter defaults for lender code branch, guarantor code, MPN type, promissory note delivery method, processing type code, enrollment status code, grade level, loan begin and end date, anticipated completion date.
9. In the **Disbursement Information** section, you can enter disbursement date and hold or release information.
10. When you have entered the default information, click **Save**. The defaults you set up are specific to your User ID.

Using an Existing Default

When you have created a default set, you can select and use that set or other existing default sets.

To use a default set:

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1. Click the drop-down arrow for the **Select Default** field.
2. Select the default you wish to use.
3. Click **Apply Defaults**.
4. The page will be populated with the default values that you set up.

Editing and Deleting Existing Defaults

To edit or delete a default that you have created:

1. Click **Manage Defaults**.
2. The **Manage Defaults** page will appear.
3. To delete an existing default, click the **Delete** button for that default set.
4. To edit an existing default, click the **Edit** button for that default set, and edit the default information.
5. Click **Save Changes** when done.
6. You may create a new default set from an existing default set. Click the **Edit** button for that default set and make the changes. Enter a new name for this default set, and then click **Save as New Defaults**.
7. If you have already created the maximum number of twenty default sets, then the **New Default Set** button will disappear.

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Creating a Certification Request Report

To generate a report of certification requests:

1. On the **Certification Request Processing** page, click **Generate Report**.
2. You will receive a message when the report is successfully generated. An R34 (*Certification Requests*) report will be created.
3. To view the report, return to the **Function Selection** menu, and select **View Reports**.

Certification Requests Report										
Report ID : 0322000.R34										
Report Date : 03/22/05										
School Name : ELM University - Satellite Campus						School Code : 000003 55				
Student Information			Borrower Information			ELM Rec'd Date	Loan Type	CL Unique ID	Credit Exp Date	
Lender			Lender Code			Loan Status	Loan Amount	Guarantor Name	Loan From	Loan To
						Alt Program Name	Alt Prog Code	Guarantor Code		
000-55-1111			000-55-9999			12/12/03	ALT	ELMRES0000WQP7G9D	10/10/04	10/10/04
STUDENT	DAWD	S	STUDENT	BILL		Credit Approved	\$1,222.00		10/10/03	10/10/04
ELM			000001-00							
000-55-1111			000-55-9999			12/12/03	ALT	ELMRES0000WQP7GCL	10/10/04	10/10/04
STUDENT	DAWD	S	STUDENT	BILL		Credit Approved	\$6,111.00		10/10/03	10/10/04
ELM			000001-00							
000-55-1111			000-55-9999			12/12/03	ALT	ELMRES0000WQP7GCV	10/10/04	10/10/04
STUDENT	DAWD	S	STUDENT	BILL		Credit Approved	\$1,999.00		10/10/03	10/10/04
ELM			000001-00							
0000-56-1111			000-56-9999			08/05/04	ALT	82886301005GQW004	08/01/04	12/31/04
STUDENT	MEGAN		STUDENT	ROBERT	W	Certification Requested	\$5,222.00			
ELM			000001-00							
000-57-1111			000-56-9999			08/05/04	ALT	82886301005GQW002	08/01/04	05/31/05
STUDENT	AMY	M	STUDENT	ROBERT	E	Certification Requested	\$1,312.00			
ELM			000001-00							
000-58-1111			000-58-9999			01/22/04	ALT	ELMRES0000WRJRK2Q	01/01/05	
STUDENT	DANIEL		STUDENT	DANIEL	K	Credit Approved	\$8,999.00			
ELM			000001-00							
000-59-1111			000-59-9999			09/16/03	ALT	x008000000BAMW250	02/01/04	08/01/03
STUDENT	WESLEY		STUDENT	MARY	K	Certification Requested	\$1,222.00		05/31/04	
ELM			000001-00							
000-60-1111			000-60-9999			09/11/03	ALT	ELMRES0000WJLNC22	01/01/04	
STUDENT	WILLIAM		STUDENT	ANN	B	Cert Req Partially Saved	\$1,000.00	ELM GuaTest		
ELM			000001-00					001		
000-61-1111			000-61-9999			08/05/04	ALT	82886301005GQW001	08/23/04	05/31/05
STUDENT	VERNON		STUDENT	VERNELL		Cert Req Partially Saved	\$4,222.00			
ELM			000001-00							

Deleting Certification Requests

When you delete certification requests, you are removing them from view on the **Certification Request Processing** page, and setting the status to deleted (060 – Cert Req Deleted). Deleting a certification request does not send a reject notice to the lender. To delete certification requests:

1. On the **Certification Request Processing** page, select the files to be deleted by clicking the checkbox in the **Select** column.
2. Click **Delete Selected**.

SSN	Student Name	Grade Level	Loan Type	Requested Loan Amount	Received Date	Lender Name	Lender Code	Lender Expiration Date	School Code	Status	Select
000-11-2222	RECORD, TEST		Grad PLUS	\$20,000.00	05/29/2009	ELM	000001	11/29/2009	000003-00	Credit Approved	<input type="checkbox"/>
000-22-3333	STUDENT, SALLY		PLUS	\$0.00	08/01/2008	ELM	000001	12/31/2008	000003-00	Certification Requested	<input type="checkbox"/>

- ☞ To delete all records at the same time, click **Select All**, and then **Delete Selected**.

Rejecting Certification Requests

When you reject certification requests, you are removing them from view on the **Certification Request Processing** page, setting the status to rejected (070 – Cert Req Rejected), and generating an @IT record to the lender, if they are profiled to receive it. An @IT record is a CommonLine termination record which is sent in a Response file to the lender. To reject certification requests:

1. On the **Certification Request Processing** page, select the files to be rejected by clicking the checkbox in the **Select** column.

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2. Click **Reject Selected**.

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Certification Request Processing

SSN	Student Name	Grade Level	Loan Type	Requested Loan Amount	Received Date	Lender Name	Lender Code	Lender Expiration Date	School Code	Status	Select
000-11-2222	RECORD, TEST		ALT	\$20,000.00	05/29/2009	ELM	000001	11/29/2009	000003-00	Credit Approved	<input type="checkbox"/>
000-22-3333	STUDENT, SALLY		ALT	\$0.00	08/01/2008	ELM	000001	12/31/2008	000003-00	Certification Requested	<input type="checkbox"/>

Back Next List Previous List Generate Report Delete Selected

Reject Selected Select All

Exercise 4

Understanding Certification Requests

1. Find all of the certification requests on ELMWeb for Alternative loans.
2. Select and view a certification request.
3. Generate a report for the Alternative certification requests for the current week.