



EDFUND.net

User's Guide

For Schools



Title and Publication Number

EDFUND.net User's Guide, Rev July 2002

Copyright Information

Copyright © 2002, EDFUND. EDFUND.net and the EDFUND.net logo are trademarks of EDFUND. All other trademarks are the property of their respective owners.

Corporate Headquarters

EDFUND
3300 Zinfandel Drive
P.O.Box 419045
Rancho Cordova, CA 95741-9045
USA



Contents

1 Getting Started

What You Need to Begin	1-2
Ensuring Browser Compatibility	1-2
Enabling Cookies	1-3
Obtaining Login IDs	1-3
Downloading Adobe Acrobat Reader	1-3
Logging In.	1-3
Navigating the School Pages	1-4
Sending Feedback	1-6
Accessing FAPS	1-7
Getting Help	1-7
Accessing WebGrants.	1-8

2 Loan Applications

Completing Online Applications	2-1
--	-----

3 Loan Record Queries

Retrieving Loan Records	3-1
Printing Promissory Notes	3-4

Editing Loan Records	3-6
Cloning Loan Records	3-8
Making Change Transactions.	3-9
Adding Change Transactions	3-9
Editing Change Transactions	3-10
Viewing Pending Change Transactions	3-11
Viewing and Printing Change Transaction Histories	3-11

4 Reports

Viewing Reports	4-1
Saving Reports.	4-2
Printing Reports	4-3
Deleting Reports	4-4
Creating Reports	4-4
Creating New Reports	4-4
Using Custom Report Templates	4-10

5 Preferences

Setting School Preferences	5-1
Editing School Preferences	5-5

6 File Uploads

Uploading Files	6-1
---------------------------	-----



1 Getting Started

Designed for financial aid administrators, EDFUND.net is a Web-based student loan application system from EDFUND.

Key features include:

- Ability to complete student loan applications online
 - 24-hour access to loan status information
 - Online loan/debt management advice from EDWISE™
 - Online loan counselling from EDTE\$T™
 - Streamlined application processing
 - Improved report generation
 - Customized school settings
 - Choices for process flow
 - Easy navigation
- ▶ Learn more about: [“What You Need to Begin”](#) on page 1-2
 - ▶ Learn more about: [“Logging In”](#) on page 1-3
 - ▶ Learn more about: [“Navigating the School Pages”](#) on page 1-4
 - ▶ Learn more about: [“Sending Feedback”](#) on page 1-6
 - ▶ Learn more about: [“Accessing FAPS”](#) on page 1-7
 - ▶ Learn more about: [“Getting Help”](#) on page 1-7

- ▶ Learn more about: [“Accessing WebGrants” on page 1-8](#)

What You Need to Begin

You need the following components to use EDFUND.net:

- Internet access and a Web browser with 128-bit encryption
- Cookies enabled
- Login IDs
- Adobe Acrobat Reader®
- ▶ Learn more about: [“Ensuring Browser Compatibility” on page 1-2](#)
- ▶ Learn more about: [“Enabling Cookies” on page 1-3](#)
- ▶ Learn more about: [“Obtaining Login IDs” on page 1-3](#)
- ▶ Learn more about: [“Downloading Adobe Acrobat Reader” on page 1-3](#)

Ensuring Browser Compatibility

Because EDFUND.net involves the transmission of confidential information, it requires a Web browser with 128-bit encryption. Encryption prevents anyone who tries to intercept your data transmission from reading its contents. Currently, 128-bit encryption is the strongest form of data encryption available.

Because some earlier Web browsers do not support 128-bit encryption, the following list provides browsers compatible for use with EDFUND.net:

- Microsoft Internet Explorer® 5.01 with 128 bit encryption
To download, go to <http://www.microsoft.com/windows/ie/downloads/recommended/ie501sp2/default.asp>.
- Netscape Navigator® 4.7 with 128 bit encryption
To download, go to http://home.netscape.com/download/0222101/10000-en-win32-4.76-base-128_qual.html.
(We are not supporting Netscape Navigator 6.0 at this time.)

Enabling Cookies

EDFUND.net uses cookies, which are small text files on your computer that contain your login information and preferences. To use EDFUND.net, your Web browser must have cookies enabled. EDFUND does not retain or use any information obtained from cookies.

Note: Internet Explorer is already set up with cookies enabled.

To enable cookies if you are using Netscape Navigator 4.7

- 1 On the Netscape Navigator **Edit** menu, click **Preferences**.
- 2 Double-click the **Advanced** category.
- 3 Select the **Accept all cookies** option.
- 4 Click the **OK** button.

Obtaining Login IDs

You need a user name and password to access EDFUND.net.

To obtain a user name and password

- Contact your EDFUND Client Relations Manager or contact EDFUND toll free at 1-866-222-2680.

Downloading Adobe Acrobat Reader

You can view and print loan applications, some reports, and manuals using Adobe Acrobat Reader. Adobe Acrobat Reader uses a .pdf file format, which retains all formatting. You can get the free program from the Adobe Web site.

To download Adobe Acrobat Reader

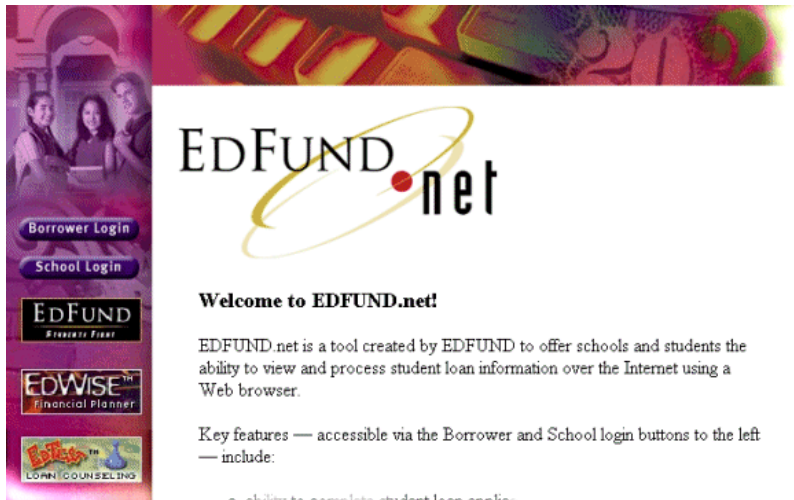
- Go to the following Web site and complete the download instructions:

<http://www.adobe.com/products/acrobat/readstep.html>.

Logging In

You log in from the EDFUND.net main page at:

<http://www.EDFUND.net>.



To Log in to the School pages

- 1 Click the **School Login** button on the sidebar.
- 2 Enter your user name and password (both are case-sensitive).



- 3 Click the **OK** button.

Navigating the School Pages

The EDFUND.net School pages provide you with the ability to:

- Complete online loan applications
- Retrieve loan records from the database
- Customize and access reports

- Customize loan applications with school preferences
- Upload loan applications completed in other programs

You can access these functions from the School Options Menu page, which you can view by clicking the **School Options** button on the sidebar. The School Options Menu page also appears when you first log in to the EDFUND.net School pages.



In addition to the **School Options** button, the sidebar includes the following buttons:

- **EDFUND Home**
Provides access to the EDFUND Web site.
- **Feedback**
Provides access to the Feedback Form page where you can send comments to EDFUND.
- **Online FAPS**
Provides access to the EDFUND Financial Aid Processing System.
- **Help**
Provides access to the online help system and manuals.
- **WebGrant**
Provides access to the CSAC WebGrants Web site.

The sidebar is always available, so you can easily navigate through the EDFUND.net program to accomplish your tasks.

► Learn more about: “[Loan Applications](#)” on page 2-1

- ▶ Learn more about: “[Loan Record Queries](#)” on page 3-1
- ▶ Learn more about: “[Reports](#)” on page 4-1
- ▶ Learn more about: “[Preferences](#)” on page 5-1
- ▶ Learn more about: “[File Uploads](#)” on page 6-1

Sending Feedback

You can contact EDFUND by completing and submitting a form on the Feedback page.

To send feedback to EDFUND

- 1 Click the **Feedback** button on the sidebar.
- 2 Enter information into the fields. For tips, see the table at the end of this section.

- 3 Click the **Submit** button.

Table 1-1 EDFUND.net Feedback Form Field Tips

Field	Tip
First Name	Type your first name. This field is required.
Last Name	Type your last name. This field is required.

Table 1-1 EDFUND.net Feedback Form Field Tips

Field	Tip
Social Security Number	Type your Social Security Number using no hyphens or spaces.
Phone Number	Type your phone number, using the following format: (555) 555-5555.
E-mail Address	Type your e-mail address. This field is required.
School Name	Type the school's name. This field is required.
Feedback/Comments	Type your feedback comments to EDFUND.

Accessing FAPS

From EDFUND.net, you can access the EDFUND Financial Aid Processing System (FAPS).

To access FAPS, you use a separate user name and password than you use with EDFUND.net. You receive this user name and password from EDFUND security at the time you establish your EDFUND.net account. For contact information, see [“Obtaining Login IDs” on page 1-3](#).

Getting Help

EDFUND.net provides two ways you can get help using the program:

- Online help

EDFUND.net provides an online help system to assist you in using the program.

- Online and printed manuals

The program provides an online user's guide and quick reference sheets for you to view online or print.

To access online help

- ☛ Click the **Help** button on the sidebar.

To access online manuals

- 1 In the online help system, select the Online Manuals topic.

- 2 Select a link to view the user's guide or a quick reference sheet.

To print manuals

- 1 While viewing the online user's guide or a quick reference sheet in Adobe Acrobat Reader, click the **File** menu.
- 2 Click **Print** and then set your printing options.
- 3 Click the **OK** button.

Accessing WebGrants

From EDFUND.net, you can access CSAC WebGrants.

To access CSAC WebGrants, you use a separate user name and password than you use with EDFUND.net. You receive this user name and password from CSAC. For contact information, see [“Obtaining Login IDs” on page 1-3](#).



2 Loan Applications

EDFUND.net allows you to complete MPN and PLUS loan applications online. You can also upload loan applications and ISIR records from other programs into the database.

When you complete an online application, you can choose to immediately route it to the appropriate party. (All loan records are routed each evening.) Or, you can hold the application to edit later or have the borrower complete or confirm.

Processing loan applications completed in other programs involves uploading the files, editing incomplete and ISIR loan records, and then routing them to the appropriate parties.

Once you route a loan record, it remains in the database to receive a response file from the appropriate party.

► Learn more about: [“Completing Online Applications” on page 2-1](#)

Completing Online Applications

Completing online Master Promissory Note (MPN) and Parent Loan for Undergraduate Students (PLUS) loan applications involves entering information into fields and then choosing to save the application and submit it, have the borrower complete or confirm, or save the application to edit later.

You can set up certain fields in the applications to be pre-set with default information in the School Preferences page.

To complete an online MPN or PLUS loan application

- 1** Click the **School Options** button on the sidebar.
- 2** Do one of the following:
 - Select the **Enter MPN Application** link.
 - or -
 - Select the **Enter PLUS Application** link.
- 3** Enter information into the fields. For tips, see the tables at the end of this section.

Borrower Information	Active Preference: ISIR PUSH
Application Status	Current Status: Ready Change Status <input type="button" value="Ready"/> ▾
Record Type Code	A - New Application ▾
Processing Type Code	GP ▾
Social Security Number	565555555 (i.e. 544444441)
Last Name	Johnson
First Name	Elizabeth
Middle Initial	
Date of Birth	04/28/1985 (i.e. 01/16/1969)
Drivers Lic. / ID Number	<input type="text"/>

- 4** Do one of the following:
 - Click the **Save/Submit Application** button to save and route the loan application to the appropriate party or to have the borrower complete or confirm.
 - or -
 - Click the **Save/No Submit** button to save the loan application for later editing.

If you chose to save and route the loan application to the appropriate party, the program places the loan record in the database with a Ready status. If the loan application is incomplete, the program presents the information for you to complete before placing the loan record in the database.

If you chose to save the loan application for editing, the program places the loan record in the database with a Hold status.

You can retrieve loan records by selecting the **Query Loan Records** link on the School Options Menu page.

Table 2-2 Parent/Borrower Information Field Tips

Field	Tip
Application Status	<p>Indicates the loan status: R=Ready H=Hold C=Canceled P=Pending processing S=Sent to appropriate party A=Initial processing successful I=Pending further approval G=Guaranteed D=Denied/Rejected B=Guaranteed, promissory note received To change the status, select an available option from the Change Status drop-down list.</p>
Record Type Code	<p>Select the type of record to send from the drop-down list. The record type code for new applications is always A-New Application.</p>
Processing Type Code	<p>Select the loan processing type from the drop-down list: GO=Guarantee the loan only (supported by EdFUND) GP=Guarantee the loan and print the promissory note (supported by EdFUND) PG=Print the promissory note and guarantee the loan (supported by other guarantors) PO=Print the promissory note only (supported by other guarantors) This field may be pre-set in School Preferences.</p>
Social Security Number	<p>Type the borrower’s Social Security Number, using no spaces or hyphens.</p>
Last Name First Name Middle Initial	<p>Type the borrower’s name. The middle initial is optional.</p>

Table 2-2 Parent/Borrower Information Field Tips

Field	Tip
Date of Birth	Type the borrower’s date of birth, using the following format: mm/dd/yyyy (07/12/1985).
Drivers Lic. / ID Number	Select a state from the drop-down list and then type the borrower’s driver’s license or state identification number, using no spaces or hyphens. If the driver’s license is issued in a territory or foreign country, select Foreign Country. If the borrower does not have a valid driver’s license or state identification number, type “N/A” or leave the field blank.

Table 2-3 Parent/Borrower Permanent Home Address Field Tips

Field	Tip
Street Address Line 1	Type the borrower’s permanent street address: the street number and name.
Line 2	If applicable, type additional street address information such as an apartment number.
City	Type the borrower’s permanent city of residence.
State	Select the borrower’s permanent state of residence from the drop-down list. If the residence is outside the U.S., select “Foreign Country.”
Zipcode	Type the borrower’s five-digit ZIP code and four-digit suffix if the residence is in the U.S.
Foreign Postal Code	If the residence is outside the U.S., type the borrower’s foreign postal code.
Perm. Home Phone Number Foreign Phone Number	Type the borrower’s home phone number or, if applicable, a foreign phone number, using no punctuation (9165554444). The foreign phone number is retained in the database for school use but is not submitted to the lender or the guarantor.

Table 2-4 Temporary Address Field Tips

Field	Tip
	Complete the Temporary Address section only if the student borrower’s temporary address while in school is different from the permanent home address. If you enter information in this section, the entire section must be complete. If this section is complete and the temporary address is different from the permanent address, the promissory note will be mailed to the temporary address.
Street Address Line 1	Type the borrower’s temporary street address: the street number and name.
Line 2	If applicable, type additional street address information such as an apartment number.
City	Type the borrower’s temporary city of residence.
State	Select the borrower’s temporary state of residence from the drop-down list. If the residence is outside the U.S., select “Foreign Country.”
Zipcode	Type the borrower’s five-digit ZIP code and four-digit suffix if the residence is in the U.S.
Foreign Postal Code	If the residence is outside the U.S., type the borrower’s foreign postal code.

Table 2-5 E-mail Address Field Tips

Field	Tip
E-Mail Address Effective Date	As an option, type the borrower’s e-mail address and date the e-mail address is verified as active, using the following format: mm/dd/yyyy (08/12/2002).

Table 2-6 Parent Borrower U.S. Citizenship Status

Field	Tip
Citizenship option buttons	Select the Citizen/National or Eligible Non-Citizen option and enter an Alien identification number if applicable.
State of Legal Residence Since (month/day/year)	Type the parent borrower’s state of legal residence and the date the residency began, using the following format: mm/dd/yyyy (01/12/1975).

Table 2-7 Parent Borrower Employer Information

Field	Tip
Employer (Name)	Type the parent borrower’s employer’s name.
Street Address Line 1	Type the employer’s street number and name.
Line 2	If applicable, type additional street address information such as a suite number.
City	Type the employer’s city.
State	Select the employer’s state from the drop-down list.
Zipcode	Type the employer’s five-digit ZIP code and four-digit suffix.
Employer Phone Number	Type the employer’s phone number, using no punctuation (9165552222).

Table 2-8 General Parent Borrower Information

Field	Tip
Specify the answers to the questions about the loan by selecting the Yes or No options.	

Table 2-9 References Field Tips

Field	Tip
Last Name First Name Middle Initial	Type the name of a reference. The middle initial is optional.
Relationship	Select the relationship of the reference to the borrower option from the drop-down list.
Street Address Line 1	Type the reference’s street number and name.
Line 2	If applicable, type additional street address information such as an apartment number.
City	Type the reference’s city.
State	Select the reference’s state from the drop-down list.

Table 2-9 References Field Tips

Field	Tip
Zipcode	Type the reference’s five-digit ZIP code and four-digit suffix.
Perm. Home Phone Number	Type the reference’s phone number, using no punctuation (9165552222).

Table 2-10 Student Information Field Tips

Field	Tip
Last Name	Type the student’s last name.
First Name	Type the student’s first name.
Middle Initial	Type the student’s middle name (optional).
Social Security Number	Type the student’s Social Security Number, using no spaces or hyphens (565295555).
Date of Birth	Type the student’s date of birth, using the following format: mm/dd/yyyy (07/12/1985).

Table 2-11 Student U.S. Citizenship Status

Field	Tip
Citizenship option buttons	Select the Citizen/National or Eligible Non-Citizen option and enter an Alien identification number if applicable.

Table 2-12 Loan Interest Information Field Tips

Field	Tip
	Select the Yes option if the student borrower wants to pay interest on the unsubsidized portion of the loan while in school. Select the No option if the student borrower wants to add the interest to the loan principal.

Table 2-13 Lender Information Field Tips

Field	Tip
Lender Name	Indicates the preferred lender to handle the loan. To change the lender, select a lender from the drop-down list. Preferred lenders are at the top of the list. This field may be pre-set in School Preferences.

Table 2-14 School Information Field Tips

Field	Tips
Guarantor	<p>Select the guarantor from the drop-down list. The list contains guarantors with whom the school does business.</p> <p>This field may be pre-set in School Preferences.</p>
P-Note Delivery Code	<p>Select the code of the preferred method for delivering the promissory note to the borrower in the drop-down list:</p> <p style="text-align: center;">E=E-Mail P=Paper W=Web</p> <p>Note: If EdFUND is processing the loan, select "P."</p> <p>This field may be pre-set in School Preferences.</p>
Unique ID / Sequence Number	<p>Indicates the CommonLine Unique ID for the loan and a sequence number when the response file is received. If the Unique ID is generated by the school's Financial Aid Management (FAM) system, it will be displayed when the loan is uploaded in the database. If it is not, EdFUND.net will assign the CommonLine Unique ID.</p>
Serial Loan Code	<p>Select the serial code of the loan from the drop-down list:</p> <p style="text-align: center;">New Serial Blank</p> <p>If you select "Blank," and the school participates in the serial loan process, EdFUND will check for an existing Master Promissory Note for the same borrower with the same lender. If one exists, EdFUND.net will populate the field with an S. If an existing MPN does not exist for the same borrower with the same lender, EdFUND.net will populate the field with an "N."</p> <p>This field may be pre-set in School Preferences.</p>
Signature Code	<p>Select the Yes or No option to indicate if the school has a valid, signed promissory note.</p>
Signature Date	<p>Type the date the school acquired the signature, using the following format: mm/dd/yyyy (08/12/2002).</p>

Table 2-14 School Information Field Tips

Field	Tips
Loan Period Begin Date	Type the date the loan period begins, using the following format: mm/dd/yyyy (08/12/2002). This field may be pre-set in School Preferences.
Loan Period End Date	Type the date the loan period ends, using the following format: mm/dd/yyyy (08/12/2002). This field may be pre-set in School Preferences.
Grade Level	Select the student’s grade level during the loan period: 1=Freshman/1st Yr. 2=Sophomore/2nd Yr. 3=Junior/3rd Yr. 4=Senior/4th Yr. 5=5 th Yr/Undergraduate A=First Year Graduate/Professional B=Second Year Graduate/Professional C=Third Year Graduate/Professional D=Beyond Third Year Graduate/Professional Select a level from the drop-down list. This field may be pre-set in School Preferences.
Enrollment Status	Select the student’s enrollment status from the drop-down list: F=Full time H=Half time L=Less than half time This field may be pre-set in School Preferences.
Anticipated Graduation Date	Type the student’s expected graduation date, using the following format: mm/dd/yyyy (06/01/2006). This field may be pre-set in School Preferences.
Cost of Attendance	Type the cost of attendance for the student.
Estimated Financial Aid	Type the estimated financial aid for the student.
Expected Family Contribution	Type the expected family contribution for the student.

Table 2-14 School Information Field Tips

Field	Tips
Certified Loan Amounts	Type the total loan amounts the school is certifying for the borrower. This field can be pre-set in School Preferences.
School Certification Date	Type the date the school certified the loan amounts, using the following format: mm/dd/yyyy (08/12/2002). This field may be pre-set in School Preferences.
School Use Field	Provides information the school would like to include. Type comments appropriate for your school.
Disbursements	Type the loan disbursement dates to have the funds disbursed, using the following format: mm/dd/yyyy (01/12/2003). Type the amounts to disburse. And select the disbursement status from the drop-down list. Schools can split the total loan amount into four disbursements only with 706 California Student Aid Commission/EDFUND as the guarantor. If disbursements are split in the Disbursement Amount field for any other guarantor, check with the guarantor to determine if this field is read. With EDFUND guaranteed loans, if no disbursement amounts are provided, EDFUND splits the disbursements evenly, depending upon the number of disbursement dates provided. These fields may be pre-set in School Preferences.

- ▶ Learn more about: [“Editing Loan Records” on page 3-6](#)
- ▶ Learn more about: [“Cloning Loan Records” on page 3-8](#)
- ▶ Learn more about: [“Setting School Preferences” on page 5-1](#)



3 Loan Record Queries

EDFUND.net stores loan records in a database. You can retrieve loan records that you have completed online or uploaded in order to view and print promissory notes. You can also edit or delete incomplete loan records that have a Hold status.

- ▶ Learn more about: [“Retrieving Loan Records”](#) on page 3-1
- ▶ Learn more about: [“Printing Promissory Notes”](#) on page 3-4
- ▶ Learn more about: [“Editing Loan Records”](#) on page 3-6
- ▶ Learn more about: [“Cloning Loan Records”](#) on page 3-8
- ▶ Learn more about: [“Making Change Transactions”](#) on page 3-9

Retrieving Loan Records

Retrieving a loan record involves entering information about a loan and then clicking the Submit Query button to search the database.

To retrieve a loan record

- 1 Click the **School Options** button on the sidebar.
- 2 Select the **Query Loan Records** link.

- Enter information about the loan you want to retrieve. You can use as many or as few query fields as you want. For tips, see the table at the end of this section.



Note: If you want to use an existing loan record as the basis for creating a new one, only use the Social Security Number field to retrieve the loan you want to “clone.” For more information, see [“Cloning Loan Records” on page 3-8.](#)

Enter One Or All Fields To Access Loan Records	
Social Security Number	<input type="text"/> (i.e. 444556666)
First Name	A <input type="text"/>
Last Name	Gonzales <input type="text"/>
Application Status	<input type="text"/>
Loan Type	<input type="text"/>
Loan Period	<input type="text"/> To <input type="text"/> (Enter Begin and End Dates)
Certification Date	<input type="text"/> (i.e. 01/16/1969)
ISIR Award Year	<input type="text"/>
NOTE: If All Fields Are Left Blank When Query Is Submitted, <u>ALL</u> Database Entries Will Be Displayed	
<input type="button" value="Submit Query"/> <input type="button" value="Reset Query Values"/>	

- Click the **Submit Query** button.

Record Count: 7						
Records: 1 -- 7					Page: 1 of 1	
Name	Change Transaction	SSN	Status	App. Type*	Cert. Date	ISIR Award Year
G, G G		322121131	S	SF	07/11/2001	
GANNON, RICH R		410030110	D	PL	10/03/2001	
GANNON, STUDENT S		410030111	D	PL	10/03/2001	
GGG, NFN		300121545	C	CS	04/06/2001	
GIBSON, DEBBIE	ADD	410991100	G	PL	01/10/2002	
GIBSON, NFN	ADD	394998888	G	PL	01/10/2002	
GORFLICK, KENNETH		388661681	D	SF	07/14/2001	

*** Loan Type Code Key**

CS = Combination Loan
 PL = PLUS Loan
 SF = Subsidized Loan
 SU = Unsubsidized Loan

- 5 When the program provides a list of loan records that meet your criteria, you can do one of the following:
 - Print a promissory note by clicking the link to a loan record's borrower name or Social Security Number.
 - or -
 - Edit a loan application by clicking the link to a loan record's borrower name or Social Security Number.
 - or -
 - Add or edit a change transaction by clicking the link in a loan record's Change Transaction column.

Table 3-15 Loan Record Query Field Tips

Field	Tip
Social Security Number	Type the borrower's Social Security Number, using no spaces or hyphens (for example: 565554444).
First Name	Type the borrower's full or partial first name (for example: S or Sue). The field is not case-sensitive.

Table 3-15 Loan Record Query Field Tips

Field	Tip
Last Name	Type the borrower’s full or partial last name (for example: Sm or Smith). The field is not case-sensitive.
Application Status	Select a loan status from the drop-down list.
Loan Type	Select a loan type from the drop-down list.
Loan Period	Type the beginning and ending dates of the loan as indicated on the application. Use the following format: mm/dd/yyyy (08/01/2002).
Certification Date	Type the date the school certified the loan using the following format: mm/dd/yyyy (06/01/2002).
ISIR Award Year	Select the year the ISIR was awarded from the drop-down list. Note that this field is only populated if the loan record originated as an ISIR file upload.

- ▶ Learn more about: [“Printing Promissory Notes” on page 3-4](#)
- ▶ Learn more about: [“Editing Loan Records” on page 3-6](#)
- ▶ Learn more about: [“Cloning Loan Records” on page 3-8](#)
- ▶ Learn more about: [“Making Change Transactions” on page 3-9](#)

Printing Promissory Notes

You can view and print promissory notes. Printing involves retrieving a formatted promissory note and then using the print function of your browser or Adobe Acrobat Reader.

To print a promissory note

- 1 Complete the procedures to retrieve a loan.
- 2 Scroll to the bottom of the page, and click the **Generate Application You Can Print** button.

Query	Start Date	Amount	Amount	Release
1	04/22/2001			Release
2	05/20/2001			Release
3	06/22/2001			Release
4	07/22/2001			Release

3 Click the **Print Application** button.

PDF File Generated

EdFund application documents are displayed using Adobe Acrobat. These "portable documents" retain their true formatting across platforms and are useful for documents with complex formatting such as our applications. The reader offers search, print and other features and is available across many platforms such as a browser-based plugin or helper.

If you do not have Adobe currently installed it is available from [Adobe](#) on their [download page](#).

General instructions:

- Once the reader is installed on your system, simply clicking the Print Application button will begin the automatic process of starting the reader and displaying your application.
- The displayed application can be printed and/or saved to your local drive for later viewing.


Use The Browser Print To Print The Lender Instruction Sheet For The Student/Parent

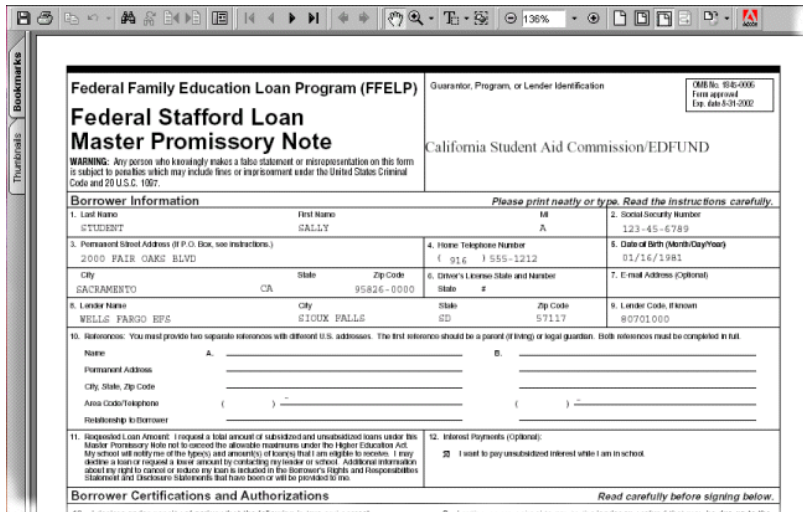


Note: Notice that you can also view and print the lender’s instructions for the promissory note. Click the **Printable Lender Instructions** button and follow the next steps using your browser’s print function to print the instructions.

- 4 Do one of the following:
- On the browser’s **File** menu, click **Print**.

- OR -

- Click the Adobe Acrobat **Print** button .



Federal Family Education Loan Program (FFELP)
Federal Stafford Loan
Master Promissory Note

Guarantor, Program, or Lender Identification
 California Student Aid Commission/EDFUND

OMB No. 916-006
 Form approved
 Exp. 04-31-2002

Borrower Information *Please print neatly or type. Read the instructions carefully.*

1. Last Name STUDENT	First Name SALLY	MI A	2. Social Security Number 123-45-6789
3. Permanent Mailed Address (If P.O. Box, see instructions.) 2000 FAIR OAKS BLVD City: SACRAMENTO CA Zip Code: 95826-0000		4. Home Telephone Number (916) 555-1212	5. Date of Birth (Month/Day/Year) 01/16/1981
8. Lender Name WELLS FARGO BFS	City SIOUX FALLS	State SD	Zip Code 57117
6. Driver's License State and Number		7. E-mail Address (Optional) 80701000	

10. References: You must provide two separate references with different U.S. addresses. The first reference should be a parent (if living) or legal guardian. Both references must be completed in full.

Name	A. _____	B. _____
Permanent Address	_____	_____
City, State, Zip Code	_____	_____
Area Code/Telephone	() _____	() _____
Relationship to Borrower	_____	_____

11. Requested Loan Amount: I request a total amount of unsubsidized and unsubsidized loans under this Master Promissory Note not to exceed the allowable maximum under the Higher Education Act. My school will verify use of the types and amounts of loans that am eligible to receive. I may decline a loan or request a lower amount by contacting my lender or school. Additional information about my right to cancel or reduce my loan is included in the Borrower's Rights and Responsibilities Statement and Disclosure Statements that have been or will be provided to me.

12. Interest Payments (Optional):
 20 I want to pay unsubsidized interest while I am in school.

Borrower Certifications and Authorizations *Read carefully before signing below.*

- 5 Set your printing options.
- 6 Click the OK button.

Editing Loan Records

You can edit or delete loan records that have a Hold status.



Note: You can also use an existing loan application as a basis for creating a new application for the same borrower. For more information, see “Cloning Loan Records” on page 3-8.

To edit a loan record with a Hold status

- 1 Complete the procedures to retrieve a loan.
- 2 Edit information in the fields. For tips, see the tables at the end the section: “Completing Online Applications” on page 2-1.
- 3 Do one of the following:
 - Click the **Save/Submit Application** button to save and route the application to the appropriate party or for the borrower to complete or confirm.

- or -

- Click the **Save/No Submit** button to save the application for further editing.

To delete a loan record with a Hold status



Caution: Deleting loan records removes them from the database; you will not be able to retrieve them later.

- 1 Complete the procedures to retrieve a loan.
 - 2 Click the **Delete** button.
 - 3 Do one of the following:
 - Click the **Delete and Print** button to delete the record and print the information in the Delete Record Confirmation page.
- or -
- Click the **Delete** button to delete the record without printing.

Delete Record Confirmation			
Deletion Date	07/21/2002		
Current Application Status	Hold		
Social Security Number	574894561		
Last Name	RUSSEL		
First Name	MARY		
Middle Initial			
School Code	00999800		
School Name	PRODUCTION TEST SCHOOL		
Unsubsidized	\$5000		
Total Certified Loan Amount	\$5000		
Loan Period Begin Date	01/01/2002		
Loan Period End Date	08/31/2002		
Disb. Number	Status	Anticipated Disb. Dates	PLUS Amount
1		02/01/2002	
2		03/01/2002	
3		04/01/2002	
4		05/31/2002	
<input type="button" value="Delete"/> <input type="button" value="Delete and Print"/> <input type="button" value="Cancel"/>			

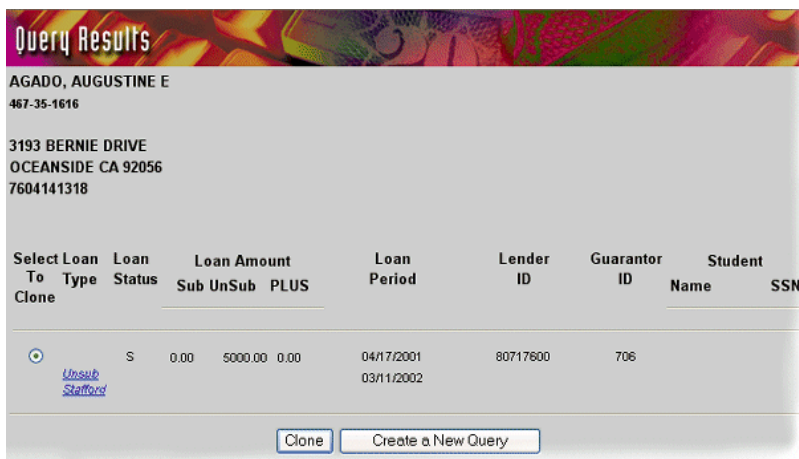
- ▶ Learn more about: [“Completing Online Applications”](#) on page 2-1
- ▶ Learn More about: [“Making Change Transactions”](#) on page 3-9

Cloning Loan Records

You can use a borrower’s existing loan application as a basis for creating a new loan application. For example, if a borrower is eligible to receive an additional loan amount, you can “clone” an existing loan record, make edits, and resubmit the new loan application.

To clone a loan record

- 1 Click the **School Options** button on the sidebar.
- 2 Select the **Query Loan Records** link.
- 3 Type the borrower’s Social Security Number only.
- 4 Click the **Submit Query** button.
- 5 Select the loan record you want to clone, and then click the **Clone** button.



- 6 Edit information in the fields. For tips, see the tables at the end of the section “[Completing Online Applications](#)” on page 2-1.
- 7 Do one of the following:
 - Click the **Save/Submit Application** button to save and route the application to the appropriate party or for the borrower to complete or confirm.
 - or -
 - Click the **Save/No Submit** button to save the application for further editing.

Making Change Transactions

You can make changes to loan records that have been guaranteed.

- ▶ Learn more about: [“Adding Change Transactions” on page 3-9](#)
- ▶ Learn more about: [“Editing Change Transactions” on page 3-10](#)
- ▶ Learn more about: [“Viewing Pending Change Transactions” on page 3-11](#)
- ▶ Learn more about: [“Viewing and Printing Change Transaction Histories” on page 3-11](#)

Adding Change Transactions

Adding a change transaction to a loan that has been guaranteed involves retrieving a loan record and indicating the change.

To add a change transaction

- 1 Click the **School Options** button on the sidebar.
- 2 Select the **Query Loan Records** link.
- 3 Enter information about the loan you want to retrieve. You can use as many or as few query fields as you want.
- 4 When the program provides a list of loan records that meet your criteria, click the **ADD** link to the loan record’s Change Transaction column.

Name	Change Transaction	SSN	Status	Appl Typ
MALLORY, HUNSTON	ADD	355257992	G	SI
MANNING, PAYTON	ADD	410030107	G	SF
MARCUS, MARCUS	ADD	408252222	G	PL
MARK, MARK	ADD	408252001	G	PL
MARY, GEARLDENE D	ADD	537552874	G	SF
MARY, GEARLDENE D	ADD	537552874	G	SI



Note: You can also add a change transaction by clicking the **Add Change Transactions** link after you retrieve a specific loan.

- 5 Select a change transaction type, and then click the **Continue** button. Notice that the available options depend on the loan type and status.

Please Select Change Transaction Type

- Loan Period, Grade Level and/or Anticipated Completion Date
- Full **Loan** Cancellation (Pre-Disbursement)
- Full/Partial **Disbursement** Cancellation and/or Date Change (Pre-Disbursement)
- Subsidized/Unsubsidized Reallocation Decrease
- Subsidized/Unsubsidized Reallocation Increase *
- Loan Increase
- Disbursement Hold/Release

* When processing a reallocation of loan funds, the decrease change transaction must be submitted first.

- 6** Edit the information in the fields, and then click the **Submit Changes** button.

Loan Period End Date	06/22/2001		
Change Transaction			
Change Certification Date	<input type="text"/>	(Required)	
Cost of Attendance	<input type="text" value="40000"/>	(Optional)	
Expected Family Contribution	<input type="text"/>	(Optional)	
Estimated Financial Aid Amount	<input type="text"/>	(Optional)	
Revised Certification Amount	<input type="text"/>	(Required)	
Increased Loan Amount	<input type="text"/>	(Required)	
Disb.	Current	Revised Disbursement	Revised Disbursement

The system displays a message if the change transaction was successful or if you need to edit the information you entered.

Editing Change Transactions

You can edit change transactions to loans that have not yet gone through the routing process.

To edit a change transaction

- 1** Click the **School Options** button on the sidebar.
- 2** Select the **Query Loan Records** link.
- 3** Enter information about the loan you want to retrieve. You can use as many or as few query fields as you want.
- 4** When the program provides a list of loan records that meet your criteria, click the **Edit** link in the loan record's Change Transaction column.

- 5 Select the link of the change transaction you want to edit.

Number Of Records Found: 1	
ALWAZANI, ONE S 419907224 Unsubsidized	
Change Transaction Type	Date
Disbursement Hold/Release	07/21/2002
<input type="button" value="Create a New Query"/>	<input type="button" value="Return to Query Results"/>

- 6 Edit the information.
- 7 Click the **Submit Changes** button.

Viewing Pending Change Transactions

Viewing pending change transactions involves retrieving a loan record and clicking a **View Pending Change Transactions** link.

To view a pending change transaction

- 1 Complete the procedures to retrieve a loan.
- 2 In the loan application page, select the **View Pending Change Transactions** link.

Borrower Information	
Application Status	Current Status: Guaranteed
Change Transactions	Add Change Transaction(s) View Pending Change Transaction(s)
Record Type Code	A - New Application
Processing Type Code	CO

- 3 Select the link of the change transaction you want to view.



Note: You can also edit the change transaction you select. For more information, see [“Adding Change Transactions” on page 3-9](#).

Viewing and Printing Change Transaction Histories

You can view and print a change transaction history.

To view a change transaction history

- 1 Complete the procedures to retrieve a loan.
- 2 In the loan application page, select the **View Transaction History** link.

To print a change transaction history

- 1** While viewing a change transaction history, click **Print** from the browser's **File** menu.
- 2** Set your printing options.
- 3** Click the **OK** button.



4 Reports

In addition to allowing you to create your own reports, EDFUND.net generates standard reports to help you quickly process and manage loans. You can view, save, print, delete, and create a variety of reports.



Note: You can also access Common Line Response files from the Reports page.

- ▶ Learn more about: [“Viewing Reports”](#) on page 4-1
- ▶ Learn more about: [“Saving Reports”](#) on page 4-2
- ▶ Learn more about: [“Printing Reports”](#) on page 4-3
- ▶ Learn more about: [“Deleting Reports”](#) on page 4-4
- ▶ Learn more about: [“Creating Reports”](#) on page 4-4

Viewing Reports

You can quickly view standard reports within EDFUND.net.

To view a report

- 1 Click the **School Options** button on the sidebar.
- 2 Select the **Download Reports** link.
- 3 Click the **View** button that corresponds with a report.

Report Name		
Rejected_Guarantees.T01152002_076046	View	Save Delete
Loan_Guarantees.T01102002_074362	View	Save Delete
CommonLine_Response.T01102002_074356	View	Save Delete
Upload_Err_Rpt_ApplicationSend_00999800_01_10_2002_20_52_11.pdf	View	Save Delete
Upload_Err_Rpt_ApplicationSend_00999800_01_10_2002_20_44_55.pdf	View	Save Delete
Loan_Guarantees.T01072002_072930	View	Save Delete
Upload_Err_Rpt_ApplicationSendResponse_706_01_07_2002_12_24_39.pdf	View	Save Delete
CommonLine_Response.T01072002_072926	View	Save Delete
Upload_Err_Rpt_ApplicationSend_00999800_11_30_2001_22_13_12.pdf	View	Save Delete



Note: To view a custom report, see “Using Custom Report Templates” on page 4-10.

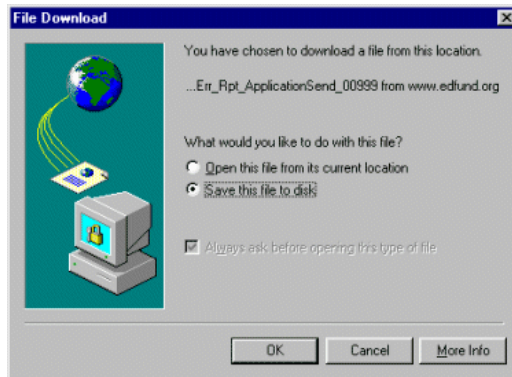
- ▶ Learn more about: “Saving Reports” on page 4-2
- ▶ Learn more about: “Printing Reports” on page 4-3

Saving Reports

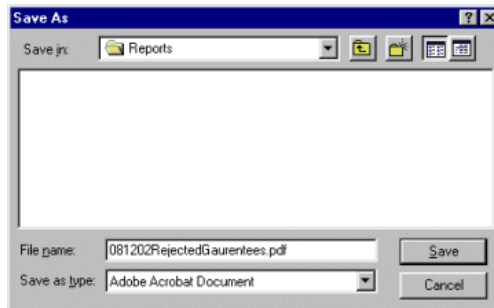
You can save reports to your computer to view and print in Adobe Acrobat Reader or Microsoft Word®.

To save a report to your computer

- 1 Click the **School Options** button on the sidebar.
- 2 Select the **Download Reports** link.
- 3 Click the **Save** button that corresponds with a report.
- 4 In the File Download dialog box, select the **Save this file to a disk** option, and then click the **OK** button.



- 5 Indicate the location to save the file and do one of the following:
 - If the report is a .pdf document, save it as an Adobe Acrobat file (for example: 081202RejectedGaurentees.pdf).
 - or -
 - If the report is not a .pdf document, save it as a Microsoft Word file (for example: 081202RejectedGaurentees.doc).




- 6 Click the **Save** button.
 - 7 When the download is complete, click the **Close** button.
- ▶ Learn more about: [“Printing Reports” on page 4-3](#)

Printing Reports

You can print reports, using Adobe Acrobat Reader or Microsoft Word.

To print a report

- 1 Complete the procedures for saving a report to your computer.
- 2 Do one of the following:
 - If the report is a .pdf file, open the report in Adobe Acrobat Reader, and click the Print button .
 - or -
 - If the report is a .doc file, open the report in Microsoft Word, and select **Print** from the **File** menu .
- 3 Set your printing options. If you are using Microsoft Word, set the report to print in a landscape format on legal sized paper.
- 4 Click the **OK** button.

Deleting Reports

You can delete reports from the EDFUND.net database.

To delete a report



Caution: Deleting reports permanently removes them from the database.

- 1 Click the **School Options** button on the sidebar.
- 2 Select the **Download Reports** link.
- 3 Click the **Delete** button that corresponds with a report.

Creating Reports

You can create custom, or ad-hoc, reports in order to access and sort data to meet your specific needs.

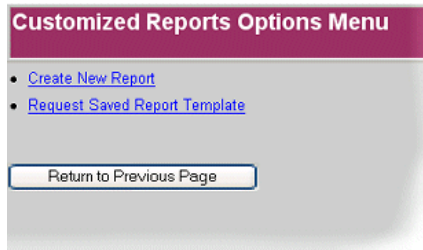
- ▶ Learn more about: [“Creating New Reports” on page 4-4](#)
- ▶ Learn more about: [“Using Custom Report Templates” on page 4-10](#)

Creating New Reports

You can create custom reports to view, print, and save. You can also save a custom report as a report template.

To create a custom report

- 1 Click the **School Options** button on the sidebar.
- 2 Select the **Customized Reports** link.
- 3 Select the **Create New Report** link.



- 4 Type a name for the report and select the information you want to appear on the report. Then, click the **Continue** button. For tips, see the tables at the end of this section.

Report Set Up

Enter Report Title

Field Name	Check fields to be displayed on report
Borrower SSN	<input type="checkbox"/>
Borrower Name	<input checked="" type="checkbox"/>
Student SSN	<input checked="" type="checkbox"/>
Student Name	<input checked="" type="checkbox"/>
Loan Type	<input type="checkbox"/>
Application Status	<input type="checkbox"/>
Certified Loan Amount	<input type="checkbox"/>
Disbursement Number	<input checked="" type="checkbox"/>
Anticipated Disbursement Date	<input checked="" type="checkbox"/>
Disbursement Amount	<input checked="" type="checkbox"/>
Disbursement Status	<input checked="" type="checkbox"/>
Lender ID	<input type="checkbox"/>
Disbursement Hold/Release Indicator	<input type="checkbox"/>
Loan Period Begin Date	<input type="checkbox"/>

- 5 Select the data for the report to query, and then click the **Continue** button. For tips, see the tables at the end of this section.

Criteria Selection	
General Information	
Loan Type	<div style="border: 1px solid gray; padding: 2px;"> CS Sub/Unsubsidized Stafford SF Sub Stafford SU Unsubsidized Stafford </div>
Lender ID	<div style="border: 1px solid gray; padding: 2px;"> <input type="text"/> </div>
Application Status	<div style="border: 1px solid gray; padding: 2px;"> G Guaranteed D Denied/Rejected B Guaranteed - P-note Received </div>
Guarantor ID	<div style="border: 1px solid gray; padding: 2px;"> <input type="text"/> </div>
Disbursement Information	
Certified Amount	\$ <input type="text"/>
Disbursement Status	<div style="border: 1px solid gray; padding: 2px;"> A Approved B Cancelled by Borrower C Cancelled by Unknown </div>
Disbursement Number	<div style="border: 1px solid gray; padding: 2px;"> <input type="text"/> </div>
Disbursement Amount	\$ <input type="text"/>

- Select the order in which you want the information sorted, and then click the **Continue** button.

Sort Order		
Borrower Name	<input checked="" type="radio"/> Ascending <input type="radio"/> Descending	
Student Name	<input checked="" type="radio"/> Ascending <input type="radio"/> Descending	
Student SSN	<input type="radio"/> Ascending <input type="radio"/> Descending	
	<input type="radio"/> Ascending <input type="radio"/> Descending	
<input type="button" value="Return To Previous Page"/> <input type="button" value="Continue"/>		
<input type="button" value="Reset Values"/>		

After the system generates the report and presents the results, you can do any of the following:

- View the information in the report by clicking the navigation buttons.

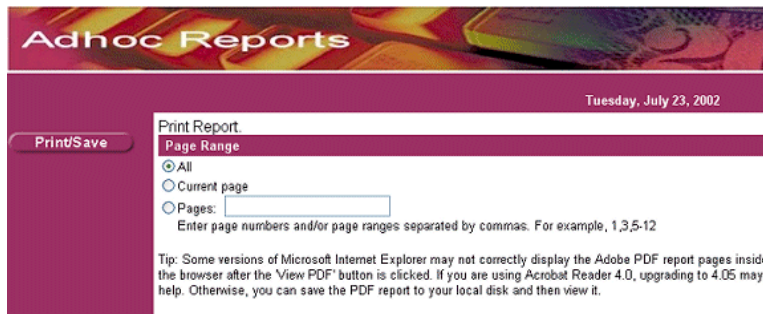
<input type="button" value="First"/> <input type="button" value="Prev"/> <input type="button" value="Next"/> <input type="button" value="Last"/> <input type="button" value="Go To"/> <input type="text" value="1"/> <input type="text" value="of 5"/> <input type="text" value="100%"/> <input type="button" value="Print/Save Report"/> <input type="button" value="Save Template"/> <input type="button" value="Close"/>



- Save or print the report by clicking the **Print/Save Report** button.


- Save the report as a template by clicking the **Save Template** button.

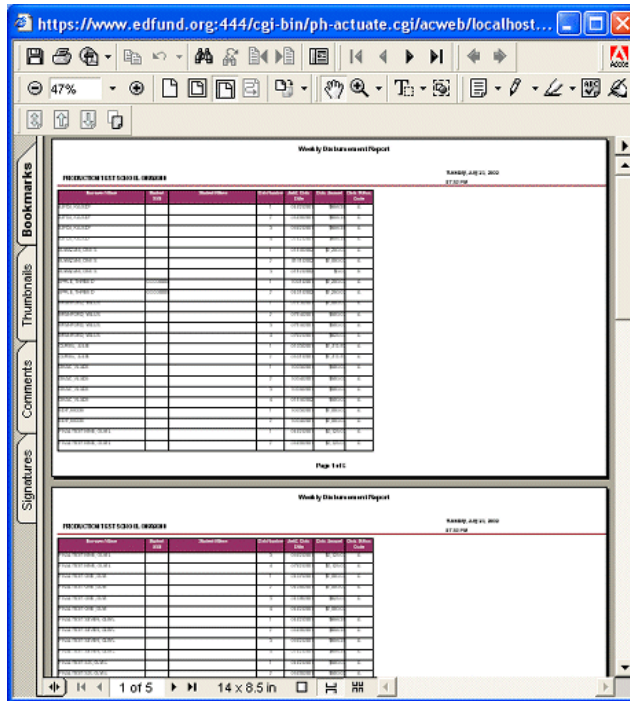
To save or print the report

- 1 Complete the procedures to create a report.
- 2 When the system generates and presents the results, click the **Print/Save Report** button.
- 3 Indicate the pages you want to save or print, and then click the **Print/Save** button.



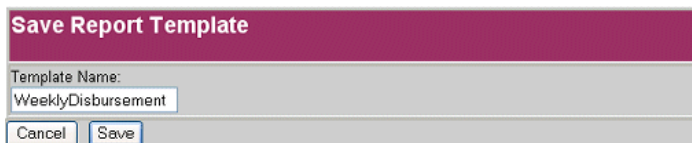
- 4 Do one of the following:
 - Click the Adobe Acrobat **Save** button , indicate the location to save the report, provide a name, and then click the **Save** button.
 - or -
 - Click the Adobe Acrobat **Print** button , set your printing options, and then click the **OK** button.

 **Note:** You can also save the report before printing, as well as go back to the report and save it as a custom report template.

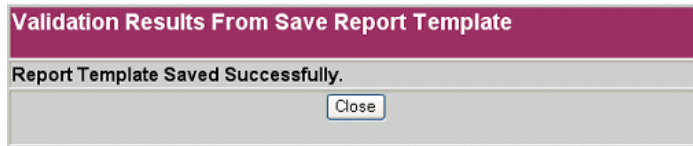


To save the report as a template

- 1 Complete the procedures to create a report.
- 2 When the system generates and presents the results, click the **Save Template** button.
- 3 Name the custom report template, and then click the **Save** button.



- 4 Click the **Close** button.



You can later access the custom report template from the Customized Reports Options Menu page. For more information, see [“Using Custom Report Templates” on page 4-10.](#)

Table 4-16 Report Set Up Field Tips

Field	Tip
Title	Use a descriptive name to help you later retrieve the report.
Fields	You can select up to 10 fields. Each selection appears as a column heading on the report.

Table 4-17 Criteria Selection Field Tips

Field	Tip
Loan Type	Select a loan type from the list. You can make multiple selections by pressing the Ctrl key while selecting items.
Application Status	Select an application status from the list. You can make multiple selections by pressing the Ctrl key while selecting items.
Lender ID	Select a lender from the drop-down list.
Guarantor ID	Select a guarantor from the drop-down list.
Grade Level	Select a grade level from the list. You can make multiple selections by pressing the Ctrl key while selecting items.
Enrollment Status	Select an enrollment status from the drop-down list.
Disbursement Number	Select a disbursement number from the drop-down list.

Table 4-17 Criteria Selection Field Tips

Field	Tip
Disbursement Status	Select a disbursement status from the list. You can make multiple selections by pressing the Ctrl key while selecting items.
Disbursement Hold/Release Indicator	Select a disbursement indicator from the drop-down list.
ISIR Award Year	Select the year the ISIR was awarded from the drop-down list.
Disbursement Date	Type a date range in the fields, using the following format: mm/dd/yyyy (08/01/2002).
Loan Period Begin Date	Type a specific date in the field, using the following format: mm/dd/yyyy (08/01/2002).
Loan Period End Date	Type a specific date in the field, using the following format: mm/dd/yyyy (08/01/2002).
Anticipated Graduation Date	Type a date range in the fields, using the following format: mm/dd/yyyy (08/01/2002).
School Certification Date	Type a date range in the fields, using the following format: mm/dd/yyyy (08/01/2002).
Certified Loan Amount	Type the certified loan amount. You can use a decimal point, but you do not need to use a comma.
Disbursement Amount	Type the disbursement amount. You can use a decimal point, but you do not need to use a comma.

Using Custom Report Templates

You can use a custom report template as the basis for creating a new custom report.

To use a custom report template

- 1 Click the **School Options** button on the sidebar.
- 2 Select the **Request Saved Report Template** link.
- 3 Select the link of the report you want to use.

Requested Report Template	
Report Template Names	Check Boxes To Delete
Deb #2	<input type="checkbox"/>
Outstanding Disb	<input type="checkbox"/>
WeeklyDisbursement	<input type="checkbox"/>

- 4 Type a new name for the report and make any changes to the information you want to appear on the report. Note that if you want to edit the existing custom report template, leave the name the same. Then, click the **Continue** button.
- 5 Make any changes to the query criteria, and then click the **Continue** button.
- 6 Make any changes to the order in which you want the information sorted, and then click the **Continue** button.

After the system generates the report and presents the results, you can view, save, print, or save the report as a template using the buttons on the navigation bar at the top of the page. For more information, see “[Creating New Reports](#)” on page 4-4.



Note: To edit an existing report template, you can make your changes and save the report. When you save the report, the system allows you to overwrite the existing report template.

To delete a custom report template



Caution: Deleting reports permanently removes them from the database.

- 1 Click the **School Options** button on the sidebar.
- 2 Select the **Request Saved Report Template** link.
- 3 Select the check box of the custom report template you want to delete.
- 4 Click the **Delete** button.



5 Preferences

EDFUND.net allows you to set up information to pre-fill fields in online applications. For example, you can pre-set a preferred lender, guarantor, and loan disbursements to make completing online forms more efficient and consistent.

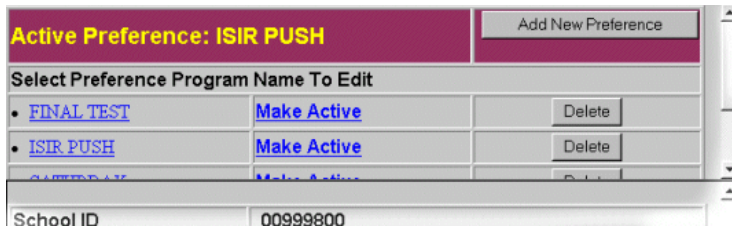
- ▶ Learn more about: [“Setting School Preferences” on page 5-1](#)
- ▶ Learn more about: [“Editing School Preferences” on page 5-5](#)

Setting School Preferences

Setting school preferences involves creating a preference and then entering information to be added to the fields. You can create different preferences and choose which one to make active (the preference to currently use with new online applications).

To make a preference active

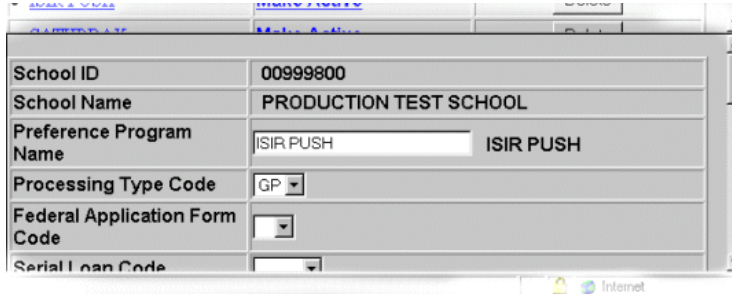
- 1** Click the **School Options** button on the sidebar.
- 2** Select the **School Preferences** link.
- 3** In the top part of the page, select the **Make Active** link that corresponds with a preference.



All online applications now contain the information set up in this preference.

To create a preference

- 1 Click the **School Options** button on the sidebar.
- 2 Select the **School Preferences** link
- 3 In the top part of the page, click the **Add New Preference** button.
- 4 Enter as much information as necessary into the fields of the bottom part of the page. For tips, see the table at the end of this section.



- 5 Click the **Submit/Save** button.

Table 5-18 School Preferences Field Tips

Field	Tip
School ID	Displays the school’s United States Department of Education (USED) code.
School Name	Displays the school’s name.

Table 5-18 School Preferences Field Tips

Field	Tip
Preference Program Name	Type a name for the preference.
Processing Type Code	Select the processing type by selecting an option from the drop-down list: GO=Guarantee the loan only (supported by EdFUND) GP=Guarantee the loan and print the promissory note (supported by EdFUND) PG=Print the promissory note and guarantee the loan (supported by other guarantors) PO=Print the promissory note only (supported by other guarantors)
Federal Application Form Code	Select the type of application from the drop-down list: M=Master Promissory Note (MPN) P=Parent Loan for Undergraduate Students (PLUS)
Serial Loan Code	Select the serial loan code from the drop-down list: New Serial Blank If you select Blank, and your school participates in the serial loan process, EdFUND will check for an existing Master Promissory Note for the same borrower with the same lender. If one exists, EdFUND.net will populate the field with an "S". If an existing MPN does not exist for the same borrower with the same lender, EdFUND.net will populate the field with an "N."
Guarantor	Select a preferred guarantor from the drop-down list. The list contains all guarantors with whom your school does business.
Lender	Select a preferred lender from the drop-down list.

Table 5-18 School Preferences Field Tips

Field	Tip
Grade Level	Select a student grade level during the loan period from the drop-down list: 1=Freshman/1st Yr. 2=Sophomore/2nd Yr. 3=Junior/3rd Yr. 4=Senior/4th Yr. 5=5 th Yr/Undergraduate A=First Year Graduate/Professional B=Second Year Graduate/Professional C=Third Year Graduate/Professional D=Beyond Third Year Graduate/Professional
Enrollment Status	Select a student enrollment status from the drop-down list: F=Full time H=Half time L=Less than half time
Anticipated Completion Date	Type an expected graduation date, using the following format: mm/dd/yyyy (06/01/2006).
Program Cost	Type a cost of attendance.
School Certification Date	Type a date your school certified loan amounts, using the following format: mm/dd/yyyy (08/12/2002).
Loan Period Start Date	Type a date a loan period begins, using the following format: mm/dd/yyyy (08/12/2002).
Loan Period End Date	Type a date a loan period ends, using the following format: mm/dd/yyyy (08/12/2002).
P-Note Delivery Code	Select the code of the preferred method for delivering the promissory note to the borrower from the drop-down list: E=E-Mail P=Paper W=Web Note: If EdFUND is processing the loan, select "P."
Disbursements	Enter the dates your school wants to disburse funds. Also select the disbursement status (Hold or Release) from the drop-down list.

Editing School Preferences

You can edit previously-created preferences.

To edit a preference

- 1 Click the **School Options** button on the sidebar.
- 2 Select the **School Preferences** link
- 3 Select the name link of the preference you want to edit.
- 4 Edit the information in the fields of the bottom part of the page.
- 5 Click the **Submit/Save** button.

To delete a preference



Caution: Deleting preferences permanently removes them.

- 1 Click the **School Options** button on the sidebar.
- 2 Select the **School Preferences** link.
- 3 In the top part of the page, select the **Delete** button that corresponds with a preference.



6 File Uploads

EDFUND.net allows you to upload loan applications completed in other programs such as Application Send and ISIR Files.

When you upload completed Application Send files, the loan records are given a Ready status in the database and are routed to the appropriate party (during the evening extraction process). When you upload incomplete Application Send files, the loan records are given a Hold status in the database and can be completed in EDFUND.net. ISIR files are also given a Hold status in the database to be completed in EDFUND.net.

Your school may also have a Pass-Through process set up. The Pass-Through process allows you to upload files and have them immediately routed to the appropriate party, bypassing the database.

► Learn more about: [“Uploading Files” on page 6-1](#)

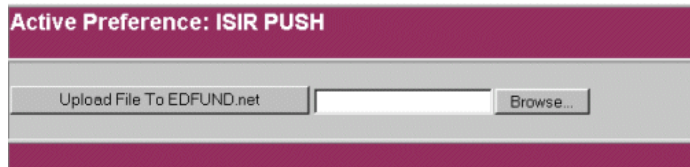
Uploading Files

Uploading a file involves indicating the location of the file and then clicking the **Upload File to EDFUND.net** button.

To upload a file

- 1 Click the **School Options** button on the sidebar.
- 2 Select the **Upload File to EDFUND.net** link.

- 3 Do one of the following:
 - Type the name and path of the file to upload.
 - or -
 - Use the **Browse** button to locate the file to upload.



- 4 Click the **Upload File to EDFUND.net** button.

If the file is successfully uploaded, the program confirms the upload process.

If the file is not successfully uploaded, the program provides error information.

You can choose to upload another file by clicking the **Upload Another File** button.

▶ Learn more about: [“Editing Loan Records” on page 3-6](#)

