Student Loan Manager

Student_Loans.dnax
Extension ID: bce80837-ddf4-4482-8747-fb50420a2386

Overview:
Student Loan Management is a DNA application created for financial institutions (FI) which offer student loans and would like to manage the student's academic and loan records within DNA™.

This application allows a financial institution to extend the existing student (person) information in DNA by:
- Tracking schools a student is or has been enrolled in
- Recording and maintaining enrollment details such as such as student IDs, course work majors, terms attended, class hours, grade points, and notes
- Recording and maintaining loan advances by enrollment term

Key Benefits:
Using Student Loan Management a financial institution can quickly view and manage both student academic and loan advance history, providing the FI with a clear picture of how student loan funds are leveraged.

Processing:
Maintenance Screens: For each section listed above you will have a corresponding maintenance screen to create additional records, and to edit and delete them.

Main Screen: This screen needs a student to work with. Using the Quick Search panel, you can search for and select a student (person) and view their information in Student Loan Management. Each section of the main screen is defined in detail in this document.
Pop-up Screens: To create, edit, and delete records you will see an additional screen pop-up or overlay the main screen. For example, clicking the Create button for a Term will pop-up a new screen titled Student Term Information. Here you will see an interface to create the new term.

Variables:
These calculation variables are created in the Calculation Type Student Loan Program DNAapp in the Inst Processing calculation category.

Every variable except "SLP4" is required to have a value, however, DNA does not prevent the default values created on install from being removed. If any value is cleared after installation the application will prompt the end user to set-up values following the user guide.

Variable	Code	Description (how used)	Data Type	Default
School Org Type Code	SLP1	Org type code used to define which organization records are displayed in the Student Loan Program Schools screen	VC	SLPG

School Address Type Code	SLP2	Address type code used to define the address displayed for the school in the Student Loan Program Schools screen	VC	PRI
School Accred. User Field Code	SLP3	User field code that holds the accredited Yes/No value for an organization	VC	SLPG
Student Loan Minor Codes	SLP4	Minor account type codes used to define the student loan products that are displayed in the Student Loans section of the Student Loan management screen. If left blank no loans will be selected in the Student Loans screen	STR	Blank
Student Loan Account Roles	SLP5	Account role codes used to define the persons associated to a student loan to display in the Student Loan Information screen	STR	GUAR, OWN, SIGN
Student Loan RTXN Types	SLP6	Defines transaction types for loan advances to display in the Advances section of the Student Loan management screen	STR	PDSB

Screens:

Student Loan Management Classifications:
This screen is where you will create, update, and delete student classifications. You can create as many classifications as you need. The records created here are used to select a classification for a student within the app.

There are 6 records created by default, displayed in the screen appearance below.

Navigation:
    System Module:
    System > Institution > Student Loan Management > Classifications

Screen Appearance:

Student Loan Program Classifications

Classification Code ▵	Description	Date Last Maintained
CERT	Certificate	8/14/2018 12:33 PM
FRSH	Freshman	8/14/2018 12:33 PM
GRAD	Graduate	9/28/2018 11:28 AM
JUNR	Junior	8/14/2018 12:33 PM
SENR	Senior	9/28/2018 11:28 AM
SOPH	Sophomore	8/14/2018 12:33 PM

Create   Edit   Delete

Edit Details

Classification Code [   ]

Description [   ]

Close   ○ Close ○ Clear ◉ Review   Process

Field Listing:

Field	Description
Field Values	
Classification Code	Code used to select the data in a query
Description	A proper description of the classification
Date Last Maintained	Date this record was last maintained
Fields	
Classification Code	Code used to select the data in a query
Description	A proper description of the classification

Student Loan Program Enrollment:
This screen is where you will create, update, and delete student enrollment statuses. You can create as many statuses as you need. The records created here are used to select an enrollment status for a student within the app.

There are 3 records created by default, displayed in the screen appearance below.

Navigation:
System Module:
System > Institution > Student Loan Management > Enrollments

Screen Appearance:

Student Loan Program Enrollment

Enrollment Status Code △	Description	Date Last Maintained
FULL	Full Time	8/14/2018 12:33 PM
LTPT	Less Than Part Time	9/28/2018 12:00 PM
PART	Part Time	8/14/2018 12:33 PM

Create   Edit   Delete

Edit Details

Enrollment Status Code

Description

Close   ● Close ○ Clear ○ Review   Process

Field Listing:

Field	Description
Field Values	
Enrollment Status Code	Code used to select the data in a query
Description	A proper description of the enrollment status
Date Last Maintained	Date this record was last maintained
Fields	
Enrollment Status Code	Code used to select the data in a query
Description	A proper description of the enrollment status

Student Loan Program Housing:

This screen is where you will create, update, and delete student housing statuses. You can create as many statuses as you need. The records created here are used to select a housing status for a student within the app.

There are 3 records created by default, displayed in the screen appearance below.

Navigation:
  System Module:
  System > Institution > Student Loan Management > Housing

Screen Appearance:

Student Loan Program Housing

Housing Status Code △	Description	Date Last Maintained
COMM	Commuter	8/14/2018 12:33 PM
OFCP	Off-Campus	9/28/2018 12:30 PM
ONCP	On-Campus	8/14/2018 12:33 PM

Create   Edit   Delete

Edit Details

Housing Status Code [   ]

Description [   ]

Close   ⦿ Close ◯ Clear ◯ Review   Process

Field Listing:

Field	Description
Field Values	
Housing Status Code	Code used to select the data in a query
Description	A proper description of the housing status
Date Last Maintained	Date this record was last maintained
Fields	
Housing Status Code	Code used to select the data in a query
Description	A proper description of the housing status

Student Loan Program Majors:

This screen is where you will create, update, and delete student majors. You can create as many majors as you need. The records created here are used to select a major for a student within the app.

There are 5 records created by default, displayed in the screen appearance below.

Navigation:
> System Module:
> System > Institution > Student Loan Management > Majors

Screen Appearance:

Student Loan Program Majors

Major Code △	Description	Date Last Maintained
BIOL	Biology	8/14/2018 12:33 PM
BUSI	Business	8/14/2018 12:33 PM
CHEM	Chemistry	8/14/2018 12:33 PM
POLS	Political Science	8/14/2018 12:33 PM
UNDC	Undecided	8/14/2018 12:33 PM

[Create] [Edit] [Delete]

Edit Details

Major Code [   ]

Description [   ]

[Close]   ⦿ Close ○ Clear ○ Review [Process]

Field Listing:

Field	Description
Field Values	
Major Code	Code used to select the data in a query
Description	A proper description of the major
Date Last Maintained	Date this record was last maintained
Fields	
Major Code	Code used to select the data in a query
Description	A proper description of the major

Student Loan Program School:
This screen is where you will view a list of existing schools, if any. A school is essentially an organization in DNA.

As you scroll through the list of schools you will see the fields below are filled with the school information selected, providing more detail. You may also find a school name by entering the name in the Filter by Name field.

To create a school, click the create button to be directed to the Organization Maintenance screen where you will enter information about a school. To edit a school click on the name of an existing school and click the Edit button, or double-click the school name, and you will be directed to the Organization Maintenance screen for that school.

One field that is unique to schools is the option to indicate a school is "Accredited". You can modify this value within the Organization Maintenance screen following this path:
Additional > Organization Fields > School Accreditation > Edit

Schools can be deleted from within the Organization Maintenance screen by navigating to Additional > Delete. Before the Organization Maintenance screen opens, if the school you are planning to edit is associated to any students, a warning will display notifying you that the school should not be deleted.

Unlike other maintenance screens, there are no default School records created.

Navigation:
    System Module:
    System > Institution > Student Loan Management > Schools

Screen Appearance:

Student Loan Program Schools

Field Listing:

Field	Description
Field Values	
School Name	The name of the school

Address	The address fields of the school
Accredited Y/N	The value of the Organization field defining school accreditation
Fields	
Filter by Name:	A search field used to show matching results in the table above
School Name	The name of the school
Accredited Y/N	When checked, indicates the school is accredited
Mailing Address	The address of the school held in the address type code defined as a variable
City	The school city
State	The school state
Zip	The school zip code
Country	The school country

Student Loan Program Term:

This screen is where you will create, update, and delete school terms. You can create as many terms as you need. The records created here are used to select a term for a student within the app.

There are 4 records created by default, displayed in the screen appearance below.

Navigation:

System Module:
System > Institution > Student Loan Management > Terms

Screen Appearance:

Student Loan Program Term

Term Code △	Description	Date Last Maintained
FALL	Fall	9/28/2018 1:17 PM
SMMR	Summer	9/28/2018 1:17 PM
SPRG	Spring	8/14/2018 12:33 PM
WNTR	Winter	8/14/2018 12:33 PM

Create   Edit   Delete

Edit Details

Term Code [   ]

Description [   ]

Close   ◉ Close ○ Clear ○ Review   Process

Field Listing:

Field	Description
Field Values	
Term Code	Code used to select the data in a query
Description	A proper description of the term
Date Last Maintained	Date this record was last maintained
Fields	
Term Code	Code used to select the data in a query
Description	A proper description of the term

Student Loan Management:
To begin using this application you must select a student (person). This is done by searching DNA for a person using the Quick Search panel on the right side of the screen. Enter some information about a student to get started, then select the student record you wish to work with.

The Student section shows demographic information saved in DNA for the selected student. It also shows the person's driver's license, if available. To update this information, edit the Person record in DNA.

The Notes section displays any saved notes for this student, ordered by date.

The Student Loans section displays a table of data, each row representing a loan record. For each record, you can view the Transaction History by selecting the loan record and clicking the History button. Clicking the Show Inactive checkbox will toggle display of inactive loans.

The Enrollments section displays a table of data, each row representing an enrollment. An enrollment is the student associated with a school. Clicking the Show Inactive checkbox will toggle display of records with an "Enrolled" value of 'N'.

The Terms section displays a table of data, each row representing a term. Terms are associated with the student's school enrollments. The Terms grid can be collapsed in order to show more records in the Advances table.

The Advances section displays a table of data, each row representing a transaction. For each record you can view the full Transaction History by selecting an Advance record and clicking the History button. Only Advances for the account selected in the Student Loans grid are displayed.

Navigation:
> Relationships Module:
> Relationships > Quick Inquiries > Student Loan Management
>
> Relationships Module:
> Relationships > Quick Inquiries > Relationship Profile > More > Student Loan Management

Screen Appearance:
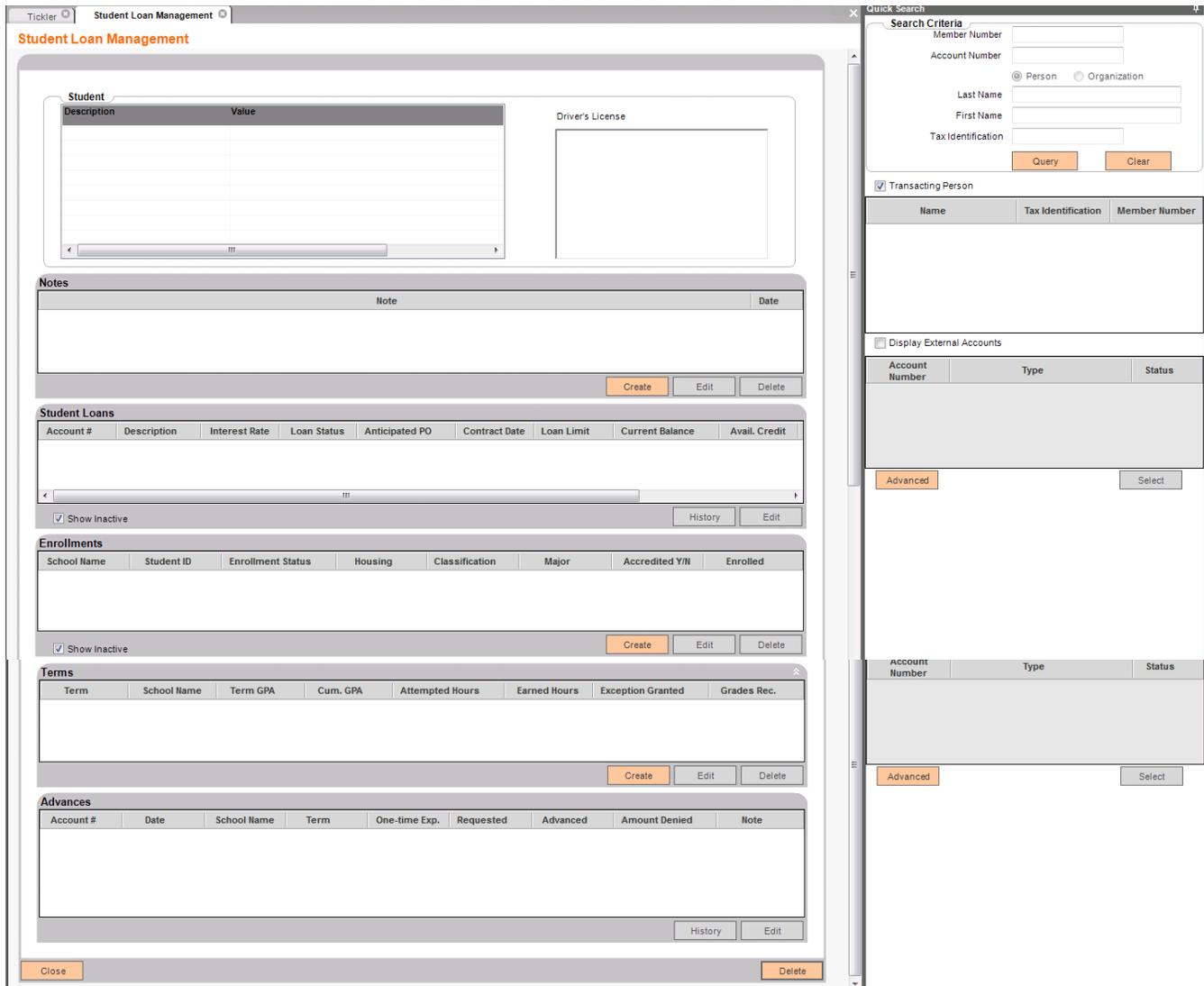
Field Listing:

Field	Description
Student	
Demographic Data is displayed as Description/Value pairs. If values exist they will be displayed along with their description. Records can include addresses of multiple types, phone numbers of multiple types, etc.	
Description	Value
Name	Student Name
Member Number/Person Number	The student's member number (if Credit Union) or Person Number (if Bank)

DNA Address Type Code Description	DNA Value
Examples	
Primary	1 Main Street, Smalltown, USA 00000
Personal	000-000-0000
Cellular	000-000-0000
Driver's License	The student's primary photo ID

Notes

Note	The text for each note.
Date	Date the note was last maintained

Buttons

Create	Opens the Add/Edit Notes screen with no selected record
Edit	Opens the Add/Edit Notes screen and populates it with information from the current note record
Delete	Deletes the currently selected note

Student Loans

Account #	The unique loan account number
Description	The loan account's minor code description
Interest Rate	The current interest rate for the loan
Loan Status	Indicates if the loan is active or inactive
Anticipated PO	Anticipated pay off date for the loan, Only applicable with certain loan types
Contract Date	The date the loan account was opened
Loan Limit	The maximum amount that can be loaned, Only applicable with certain loan types
Current Balance	The current balance of the loan
Avail. Credit	The available amount of credit on the loan
Payment Amount	The next payment amount for the loan
Due Date	The current due date for the loan, if past due the row font color changes to red

Buttons

History	Opens the DNA Transaction History screen for selected account
Edit	Opens the loan information screen and populates it with the current loan record

Enrollments

School Name	The name of the school
Student ID	The student ID for the school
Enrollment Status	The current enrollment status of the student at the school
Housing	The current housing status of the student at the school
Classification	The current classification status of the student at the school
Major	The current major of the student at the school
Accredited Y/N	The accreditation status of the school

Enrolled	Indicates if the student is actively enrolled or not
Buttons	
Create	Opens the Student Enrollment Information screen with no selected record
Edit	Opens the Student Enrollment Information screen and populates it with information from the current enrollment record
Delete	Deletes the currently selected enrollment record. If the enrollment record is attached to a term then the record cannot be deleted
Terms	
Term	Current Term description
School Name	Name of school associated with term
Term GPA	GPA for the term
Cum. GPA	Cumulative GPA
Attempted Hours	Hours attempted
Earned Hours	Actual hours earned
Exception Granted	Indicates if exception was granted, changes row font color to red if value is Y
Grades Rec.	Indicates if grades were received
Buttons	
Create	Open the Student Term Information screen
Edit	Launch the Student Term Information screen with the selected term data
Delete	Delete the selected term
Collapse	Terms grid can collapse in order to see more Advance records
Advances	
(only for the selected Student Loan account)	
Account #	Loan account number
Date	Date of the advance (transaction)
School Name	Name of school associated with advance
Term	Description of term associated with advance
One-time Exp.	Indicates if one-time expense was applied to advance, changes row font color to green if value is Y
Requested	Shows how much was requested
Advanced	Shows how much was actually advanced
Amount Denied	Amount that was denied, calculated from request and advanced values, column font color changes to red if value is greater than 0
Note	Displays transaction description if applicable
Buttons	
Edit	Opens the Student Advance Management screen and populates it with information from the currently selected advance
History	Opens the DNA Transaction History screen for account number in the currently selected row

Student Loan Management Buttons	
Close	Close out of the screen
Delete	Delete all records associated with the selected student

Student Note Add/Edit:

To edit a note, double click the note you want to edit. You can also single click the note then click the Edit button. To create a new note, click the Create button. To delete a note, single click the note you want to delete and click the Delete button. Notes can contain up to 2000 characters. A blank note is not allowed.

Navigation:

Relationships Module:
Relationships > Quick Inquiries > Student Loan Management > Notes > Create/Edit

Screen Appearance:

Field	Description
Field Values	
Textbox	The note text
Buttons	
Process	Create or update the note with the text from the textbox
Cancel/Close	Cancel the current edits, or close the screen

The message "Note cannot be updated to empty" will display if an existing note text is deleted and the Process button is clicked.

Student Loan Information:
Co-Applicants displays a list of persons with roles on the account, the roles being defined by the application level variable Student Loan Account Roles. You can view more information about this loan, as well as add Funds Allowance, Credit Committee Limit, Central Underwriting Limit, and Other Aid.

Navigation:
>	Relationships Module:
>	Relationships > Quick Inquiries > Student Loan Management > Student Loans > Edit

Screen Appearance:

	Student Loan Information					☒

Student Loan Information

Co-Applicants

Co-Applicant/Guarantor △	Account Number	Member Number	Address	Status	SSN
Jane M. Student			1 Main Street Somewhere M...	NonTax ...	
Jane M. Student			1 Main Street Somewhere M...	NonTax ...	

Loan Detail

Account Number		Loan Status	Active	
Anticipated Pay Off Date		Loan Limit		
Available Credit	0.00	Interest Rate	3.37500	
Loan Description	4 Year Student Loan	Current Balance	356900.93	
Contract Date	12/1/2015			
Funds Allowance	0.00	Central Underwriting Limit	0.00	
Credit Commitee Limit	0.00	Other Aid	0.00	

Close			Process

Field	Description
Field Values	
Co-Applicant/Guarantor	Persons with a defined account role on the account
Account Number	Loan account number
Member Number/Person Number	Member Number (if Credit Union) or Person Number (if Bank) of person with role
Address	Primary address
Status	Role description
SSN	Tax ID
Loan Detail	
Account Number	Loan Number
Loan Status	Loan Account status
Anticipated Pay Off Date	Displayed anticipated maturity date if applicable
Loan Limit	Limit of the loan
Available Credit	Available credit
Interest Rate	Interest rate
Loan Description	Loan Account Minor code description
Current Balance	Current Balance of Loan
Contract Date	Date loan was opened
Funds Allowance	FI can enter a value if needed
Central Underwriting Limit	FI can enter a value if needed
Credit Committee Limit	FI can enter a value if needed
Other Aid	FI can enter a value if needed
Buttons	
Process	Update the loan with the values
Cancel/Close	Cancel the current edits, or close the screen

Student Enrollment Information:

This screen allows you to either create a new enrollment or edit an existing one. The Schools table allows you to select a school in which to enroll.

Navigation:

Relationships Module:

Relationships > Quick Inquiries > Student Loan Management > Enrollments > Create/Edit

Screen Appearance:

Student Enrollment Information

Student Enrollment Information

School ▲	Address	Accredited Y/N
School	125 Test Street...	
A School of Hard Knocks	115 Mandalay... M...	N
Abraham Bald... Agriculture College	...	Y
Academy of Art University	75 New Mo... St San F...	N
Allied... College	... Purpose Rd Pippa Passes...	N
Allen Test School	...	Y
American College of Education	101 West Ohio St Suite 1200...	N
American... University	750 N Federal Highway Fort...	Y
Animal Behavior College	25104 Rye Canyon Loop...	N
Appalachian College of Pharmacy	1655 Dragon Rd Oakwood...	N
Appalachian State University	121... 28608 Boone Av...	N

Select

Edit Detail

Filter Schools [   ]

School

Student ID [   ]   ☐ Enrolled

Housing [On-Campus ▼]

Status [Full-Time ▼]

Classification [Freshman ▼]

Major [Undecided ▼]

Cancel   Process

Field	Description
Field Values	
School	Name of the school
Address	Address of the school
Accredited Y/N	Indicates if school is accredited
Edit Detail	
Filter Schools	Schools are filtered by the text in this textbox

School	Name of school selected for enrollment
Student ID	Enrolled student ID
Housing	Housing status of student
Status	Enrollment status of student
Classification	Classification status of student
Major	Major status of student
Enrolled	Checkbox to indicate student is enrolled
Buttons	
Process	Add/Edit the enrollment record with the values
Cancel/Close	Cancel the current edits, or close the screen

The message "No changes have been made" will be displayed if there have been no changes and the Process button is clicked.

Student Term Information:
This screen allows you to either create a new term or edit an existing one. The Enrollments table allows you to select a school in which this student is currently enrolled. A student enrollment is required in order to add a term to it.

Navigation:
>   Relationships Module:
>   Relationships > Quick Inquiries > Student Loan Management > Terms > Create/Edit

Screen Appearance:

Student Term Information

Student Term Information

Enrollments

School	Address	Accredited Y/N
		Y
		N
University of North Carolina Charlotte	9201 University City Blvd Charlotte North	N
		N

Select

Term Detail

Filter Schools _____

School

Term GPA [0]   Year [2019 ▼]

Cumulative GPA [0]   Term [Winter ▼]

Attempted Hours [0]   ☐ Exception Granted

Earned Hours [0]   ☐ Grades Received

Close   Process

Field	Description
Field Values	
School	Name of the school
Address	Address of the school
Accredited Y/N	Indicates if school is accredited
Buttons	
Select	Click to select an enrollment
Term Detail	
Filter Schools	Enter text to filter the list of schools the student is enrolled in
School	The name of the selected school
Term GPA	Term GPA (Grade point average)
Year	Year of Term

Cumulative GPA	Cumulative GPA
Term	Term description
Attempted Hours	Hours attempted by student
Exception Granted	Indicates if exception was granted
Earned Hours	Actual hours earned
Grades Received	Indicates if grades were received for term
Buttons	
Process	Add/Edit the term record with the values
Cancel/Close	Cancel the current edits, or close the screen

Student Advance Management:
This screen is used to associate a loan advance to a term and set the values of requested and denied amounts, as well as whether or not the advance was a one time expense. Advances can be dis-associated from a term if needed.

Navigation:
    Relationships Module:
    Relationships > Quick Inquiries > Student Loan Management > Advances > Edit

Screen Appearance:

Student Advance Management

Student Advance Management

Existing Terms

School	Term
C̶u̶	Spring 20̶
̶ ̶C̶o̶l̶l̶e̶g̶e̶	̶
F̶ ̶S̶t̶a̶t̶e̶	W̶i̶n̶t̶e̶r̶ 20̶

Select

Advance Details

School

Term

Advance Amount   3̶

Amount Requested [   ]

Amount Denied

☐ One Time Expense

Add Enrollment

Add Term

☐ Remove Term from this Advance

Close   Process

Field	Description
Existing Terms	
School	Name of the school
Term	Description of the term the student is enrolled in at the school
Buttons	
Select	Selects the term in the Existing Terms grid

| Advance Details	
School	Name of the selected school
Term	Description of the selected term
Advance Amount	Amount of Advance (transaction amount)
Amount Requested	Advance amount requested by the student
Amount Denied	Amount of the request denied to student
One Time Expense	Indicates if the advance was granted for a one-time expense
Remove Term from this Advance	When checked, the association between the school, term, and advance will be removed
Buttons	
Add Enrollment	Open Student Enrollment Information screen for the student
Add Term	Open Student Term Information screen for the student
Process	Edit the advance record with the values
Cancel/Close	Cancel the current edits, or close the screen

Additional Requirements:
DNA™ 4.2.1 or above
.NET Framework 4.5.2 (minimum)
DNA CoreAPI 1.6.1 or above

Configuration Checklist:

Item	Test Environment	Production Environment
Authorizations		
Variables		

Authorizations:

Grant authorization item Student Loan Program ('STLP') to end users who need to manage student information, along with each of the CAPR auth items. If desired you can create an AuthCode with all of these AuthItems and grant that AuthCode to the end users.
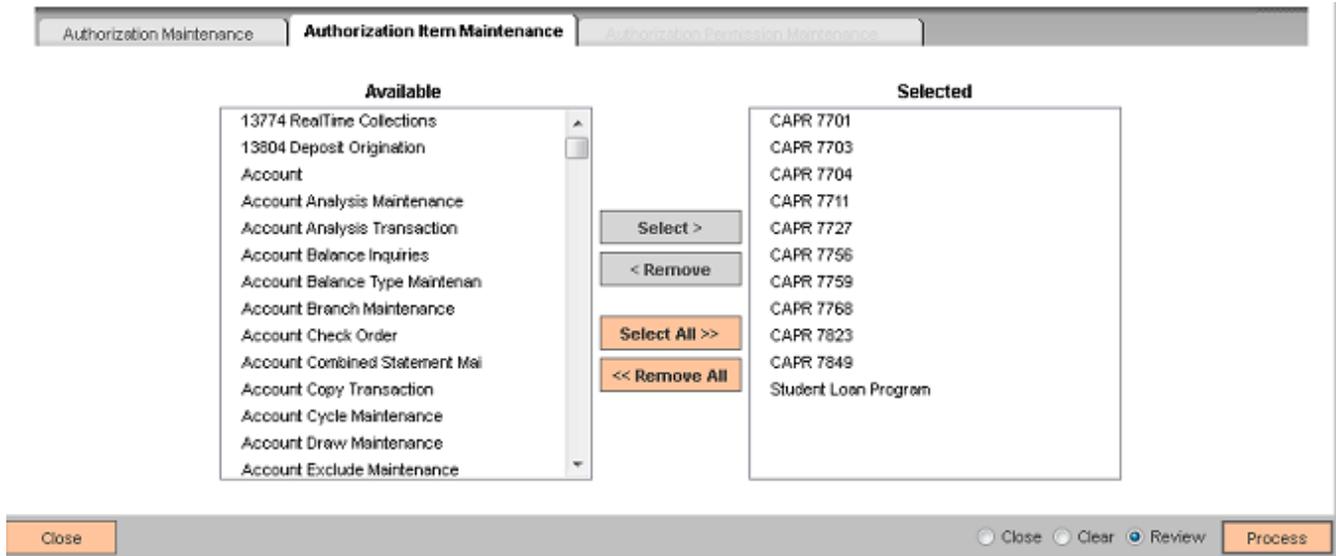
For each AuthItem grant all AuthItemPermissions and Process (one example shown below)
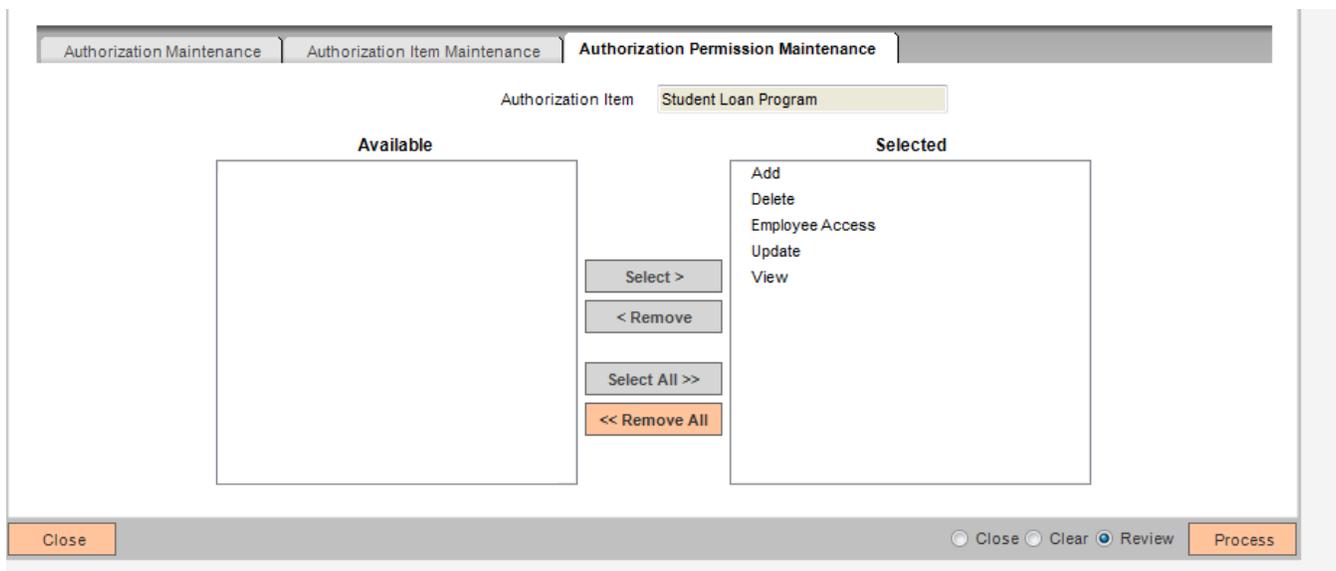
Variables:

Set each variable value as needed for your institution.   Example shown uses the default values for user field, address type and org type.

Variables

Selection Criteria ⌃

Calculation Type   [Student Loan Program DNAapp ▼]   ☐ Show History

System Variables ⌃

Type Description	Variable Description	Value
Student Loan Program DN...	School Accred User Field Code	SLPG
	School Address Type Code	PRI
	School Org Type Code	SLPG
	Student Loan Account Roles	GUAR, OWN, SIGN
	Student Loan Minor Codes	1ARM,3ARM,5ARM,HE80,HE90
	Student Loan RTXN Types	PDSB,NDSB

☐ Auto Hide   [Edit]

System Variable Maintenance

Type Description   [_____]

Variable Description [_____]

Value   [_____]

[Close]   ○ Close ○ Clear ● Review   [Process]

Revisions

Date	App Version #	Change
4/2019	1.0.0.0	Application Created