Approving/Denying Emergency Loans

PATH: CAL Components > Forms > GTeForms

This job aid will cover how to Approve or Deny an Emergency Loan.

Some people may only be able to View a Loan. Others with the Approver capability will evaluate a loan request then Approve or Deny a loan. There are 2 levels of Approvers. The first level (Counselors) can approve loans up to 1,600 and cannot waive the loan fee. The second level of Approvers (Directors & Managers) can authorize up to $3,000 and have the ability to waive the loan fee.

In this example, we are an Approver level 1, we will Evaluate a loan request and decide whether to Approve or Deny the request.

From the Main Menu, click the Cal Components link.

Then click the Forms link.

Then click on the GTeForms WorkCenter link.

Note: Your may see different folders depending on your access.

You may see different options in the left hand menu depending on your access.

All counselors will have the View link, but only a few will have Evaluate.
We will click the **Evaluate a Loans eForm** link.

**Note:** Do **NOT** click Update a Loans eForm link.

The search page will load.

To minimize the menu click the << arrow keys. (Click the >> arrows to bring the menu back.)

We could search by a specific Form ID# or other value.

In this case, we’d like to see all *Pending* loans or loans that we placed on *Hold*. We will leave all the fields blank and click **Search**.

We see 2 results.

**Note:** If there is only 1 result that request will open.

If there are multiple requests, we can click on the column headers to sort by those values.

**REMINDER:** We are in the Evaluator section so we only see requests awaiting level 1 approval. We won’t see Approved, or Pending requests that have gone to a different level of Approval. We also won’t see loans that are On Hold by another counselor.

We’ll click on *Pending* request #1431.
We can now review the information filled out by the student.

The first page explains to students what kind of loans are available and confirms whether they are eligible to proceed with a loan.

If a student is NOT eligible, they will see specific messages letting them know why they are not eligible (they have defaulted on a loan, they are withdrawn, there is an administrative hold, etc).

If there are multiple reasons for ineligibility, they will see multiple messages.

Click the Next button to move to the second page.
The second page contains the details of the request that are most pertinent to the Evaluator.

You can see the Loan Amount requested, How will the loan be paid back and the Reason for Request.

The Explanation for Request field is very narrow, so you will need to use the arrows to scroll down (or copy the text into some other form like a WORD document).

If the student selects “Other” for How will loan be paid back, a new textbox will appear asking them to elaborate.

If a student requests more than the auto-approved limit (up to $1,000 until September 10th, up to $775 after September 11th), the student will see a warning message that this request has gone to a counselor for review which may add a delay.

If the student indicated that they worked in the US, an additional section will display asking for Employment Information.
The next section will show a Relative or Sponsor in the United States.

The Preferred Payment section will show if the student has requested a Check or EFT (Electronic Fund Transfer).

Note: If this was a Co-payable loan, the amount will credit directly to the student’s account.

The Hidden Fields section does NOT show to students.

It shows the loan limits, whether the student has a block on their record, how they plan to repay the loan and who they designated as a reference.
If we had questions we could click the Hold button to prevent other counselors from working on this loan request until we have the information needed.

If put on Hold, this request will NOT show to other evaluators going in through the Evaluate a Loan eForms link.

However, it will show up in the View a Loan eForm link – so others can see its status.

In this example though, we will not hold this record. We will click Next to see the third page.
The third page shows the Terms and Conditions that the student agreed to.

Click the Next button to proceed to the fourth page.
The fourth page contains a summary of all the previous pages including the Promissory note that the student agreed to. Click the Next button when you have finished reviewing the information.
The fifth page will show the **Fee Waiver** information. (This is not shown to students).

Staff with Approver 1 access CANNOT waive the fee, the box will be greyed out to them.

Only those with Approver Level 2 access (e.g. Assistant & Associates Directors) will have the ability to check the box to waive the loan fee.

Do not use the **Comments** section. FASO business process is to NOT use this field as it is visible to students.

Having reviewed this loan application we are now ready to decide whether to **Approve**, **Deny** or put this loan on **Hold**. In this example, we have decided to grant this request, so we will click the **Approve** button.
The final page shows a Summary about the student's request, the Promissary Note, Terms & Conditions and the Loan Application Summary.
The last two sections of the final page contain helpful information such as routing and status information.

The **Basic Stage** (workflow boxes) show who approved the loan and that it has been sent to the printers to print a check.

The **Transaction Log** (which is visible to students) will keep track of any updates made.

You may see other statuses such as the record being put **On Hold**. When the check is printed, the status will change to **Authorized**, then the final status of **Executed** when it goes to the Student Financials invoice.

Here’s a different example of a loan request after the check has been printed and the information has gone to the Student Financials Account.

In this case we see a loan was reviewed by a higher level Approver (level 2).

Since the student requested a check, it was routed to CSC where someone with the Printer role printed it out (labeled as Approver 3).

Finally, this information was sent to the student’s customer account, so the loan has been fully Executed.
We can now return to our previous menu and View or Evaluate other loans.

Click the arrow keys >> to open up the eForms menu.

Or return to the Campus Solutions menu links at the top of the page.

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Support

For questions or assistance, please contact SIS Support:

- Call 510-664-9000 (press option 6 to reach SIS support)
- Email: sishelp@berkeley.edu
- Submit a ticket: https://berkeley.service-now.com/ess/create_incident