Viewing Emergency Loans

PATH: CAL Components > Forms > GTeForms > View A Loans eForm

This job aid will cover how to View an Emergency Loan to review the information and check the status. Most of the pertinent information is on the second and sixth pages of the loan form.

From the Main Menu, click the Cal Components link.

Then click the Forms link.

Then click on the GTeForms WorkCenter link.

NOTE: The folders you see may vary depending on your access.

You may see different menu options. All counselors will have the View link, but only a few people (FASO counselors or CSC Printers) will have the Evaluate link.

Do NOT click the Update a Loans eForm.

Reminder: if you visit this page regularly, you can click the Favorites link in the top left corner and save this as a favorite.
In this example, we will click the View a Loans eForm link.

If you’d like to minimize the menu click the << arrow keys.

You can search by the Form ID#, the student ID# (labeled EMPLID), Name or any of the other search options.

In this example, we’ll leave the search field blank and search for all loans.

We see 95 results. We can see the Form ID#, the Status, the Student ID#, the Student Name, the Date the form was submitted by the student, and the UID and Date from the last time the form was updated.

We can click on any of the column headers to sort by those values.

In this case we will sort by Form Status.
The statuses that may show are:

**Pending** (the form is waiting for review by FASO),

**Denied** (FASO staff has denied the application)

**On Hold** (a counselor is holding the application),

**Approved** (approved by FASO and waiting for CSC to print a check)

**Authorized** (after CSC prints the check)

**Executed** (check produced or EFT initiated and the transaction has posted to the Student Financials Account.)

In this case, we’d like to review the loan Form ID# 1315 which is *Pending*.

We can click anywhere on the line to go into the form.
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them know why they are not eligible (they have exceeded the maximum amount allowed, have defaulted on a loan, they are withdrawn, there is an administrative hold etc.).

If they are ineligible for multiple reasons, they will see multiple messages.

Click the Next button when you are ready to move to the next page.

You are not eligible for an emergency loan because you have an administrative hold. Please contact the appropriate office to resolve this hold. To view more information about your hold, including which office placed the hold, please review your profile information under the My Academics section of Cal Central.
Page Two

The second page contains the majority of the information that the student fills out.

For example: the type of loan, the amount and in the case of a Living Expense loan, whether they would like to receive a check or EFT (Electronic Funds Transfer).

If the amount the student requested for a Living Expense loan exceeded the automatic approval amount, they would see a message warning them that this request needs further review, which may lead to a delay.

If a student answers that they work in the United States, an additional section for Employment Information would show.

The student must provide a relative or sponsor in the US.
The Preferred Payment section is where a student chooses whether to pick up a check at Cal Student Central or receive the money via EFT (Electronic Funds Transfer).

There is a warning that EFT may take longer. The student should already have EFT if they select this option. If they set up EFT at the same time as requesting a loan, EFT may not activate in time and the student might get a check from Billing & Payment Services.

**Note:** If this were a Copayable loan, the amount would apply directly to the student’s bill as soon as approved.
The **Hidden Fields** section does not show to students.

The Auto-Approve limit will be listed. A living expense loan up to $775 will be automatically approved.

**NOTE:** Until September 10th a student can actually get $1,000 auto-approved.

There are 2 levels of Approval. Counselors with 1st level Approval can approve up to $1,600. Directors and others with 2nd level Approval can approve up to $3,000.

This also shows if the student has a Financial Aid Block.

The last field displays how the student plans to repay the loan.
The third page is the Terms and Conditions. The student had to agree to these terms to submit their request. There is nothing to review here. Click the Next button at the bottom of the page.
The fourth page contains the Promissory note.

---

**STUDENT SUMMARY INFORMATION**

- **Student ID**: [Redacted]
- **Student Name**: [Redacted]
- **Loan Application Number**: 1315
- **Loan Amount**: 155
- **Loan Fee Amount**: 20
- **Loan Application Date**: 06/11/2016
- **Repayment Due Date**: 10/10/2016
- **Total Amount Due**: 175

**STUDENT LOAN PROMISSORY NOTE**

1. I understand I am entering into this Student Emergency Loan Promissory Note ("Note") with the Regents of the University of California, on behalf of the University of California, Berkeley (the "University").
2. I acknowledge that I have read the Terms and Conditions of the Student Emergency Loan Program attached hereto as Exhibit A, and fully incorporated by reference ("Terms and Conditions"), and that I fully agree to these Terms and Conditions.
3. I understand that this is an interest-free Emergency Loan ("Loan") that a $20 administrative fee will be assessed, and that repayment of both the Loan and the administrative fee is due on the above-listed due date.
4. I understand that I may prepay all or any part of my unpaid Loan balance and the administrative fee at any time without penalty.
5. I understand and agree that the University will generate a charge on my student account which can be viewed in Cal Central for the amount of the Loan disbursed to me and for the administrative fee. The University may impose late fees and collection costs if I do not make the scheduled payment when due. The University may activate a block on my student record and/or withhold services including, but not limited to, disbursement of financial aid, registration for a future semester, and/or the release of academic transcripts and my diploma.
6. I understand that the Loan balance and administrative fee are due immediately upon credit of financial awards or loans processed through the University’s systems as credit to my student account in Cal Central even if the Loan due date is in the future. The University may, at its option, declare my Loan to be in default if I fail to make a scheduled payment when due or if I fail to comply with these Terms and Conditions.
7. I understand and agree that the University has the right to obtain all or any portion of delinquent Loan repayments from the State of California, including the right to offset any tax refund, unclaimed property or lottery winnings, pursuant to California law. The University may, as its option, declare my loan delinquent if I fail to make a scheduled payment when due or if I fail to comply with the Terms and Conditions.
8. I understand that it is my responsibility to ensure the University has my current name, addresses, telephone numbers, and email address in the University’s student system.
9. I authorize the University and its respective agents and contractors to contact me regarding my Loan, including repayment, at any mailing address, email address or telephone number I have or will provide. I further authorize that contact may be made to my cellular phone or other wireless device using automated telephone dialing equipment or artificial or pre-recorded voice or text messages.
10. I promise to pay to the University all sums disbursed under the terms of this Note, plus other fees which may become due as provided in this Note. I understand that by accepting the disbursement issued under this Note, I am agreeing to repay the Loan and administrative fee.
11. If I do not make any payments on the Loan when due, I promise to pay all reasonable collection costs, including attorney’s fees, court costs, and any other applicable fees.
12. I acknowledge that I have read and understand this entire Note and its Terms and Conditions. I have read and understand the promises and acknowledgments I have made herein and fully understand that this Loan has been made to me without security. I am entitled to, and have received, an exact copy of this Note.
13. My signature, or my electronically submitted Student Identification (SID) number, certifies that I have read, understand, and agree to the Terms and Conditions of this Note as stated above and in Exhibit A. I understand that failure of the University to enforce this Note is not a waiver of the University’s rights and that no provision of this Note can be waived or modified except in writing.

**PROMISSORY NOTE SIGNATURE**

By entering my Student ID below and pressing the Submit Button, I hereby agree to this Promissory Note.

**Please Enter your Student ID:** [Redacted]

**Submission Date**: 06/11/2016
Page Five

The fifth page will show if the loan fee has been waived.

Click the Next button.

Page Six

The sixth page will show the workflow as well as a Transaction log.

In this example a Level 2 approver approved this loan and then a CSC Printer Approved the check to be printed.

The Transaction log will show the steps as they occurred.

In this case, a student Initiated a request.

It was not auto-approved, so a level 2 approver reviewed and Approved the loan.

A check was requested, so the request went to a CSC Printer (aka Approver 3) who Authorized a check.

It then applied to the Student Financials invoice, so the status is now Executed.

Note: You may also see a status of “On Hold” if a counselor put the request on hold.
We have finished reviewing this loan form.

Depending on our next task, we can now scroll back up and unhide our eForm menu by clicking the >> arrows, click the menu links at the top of the page to navigate elsewhere, or click the Sign Out link in the top right corner.

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