

# North Dakota University System Campus Solutions – Financial Aid Perkins MPN Functionality

The Perkins MPN functionality creates MPNs after the loan is offered/accepted (depending on your set up) and tracks whether an MPN is recorded in the system. It follows the rules for MPN expiration (MPN expires after one year if not used, after ten years if used). The signature date on an MPN must be after the date the MPN was printed by the system.

This functionality is designed to prevent the Perkins loan from disbursing until/unless a current MPN is on record.

## One time set-up:

### Item Types/Loan Types

<b>Set Up SACR &gt; Product Related &gt; Financial Aid &gt; Awards</b>																																																																			
<p>For each Perkins item type, add a row, check-mark the <b>MPN Required</b> box and save.</p>	<div style="border: 1px solid black; padding: 5px;"> <table style="width: 100%; border-collapse: collapse;"> <tr> <td colspan="6" style="text-align: center; border-bottom: 1px solid black;"> <a href="#">FA Item Type 1</a>   <a href="#">FA Item Type 2</a>   <a href="#">FA Item Type 3</a>   <a href="#">FA Item Type 4</a>   <a href="#">FA Item Type 5</a>   <a href="#">FA Item Type 6</a> </td> </tr> <tr> <td colspan="6">SetID: MISUB</td> </tr> <tr> <td colspan="6">Item Type: 910000002300 <a href="#">FEDERAL PERKINS LOAN #1</a></td> </tr> <tr> <td colspan="6">Aid Year: 2011 Federal Aid Year 2010-2011</td> </tr> <tr> <td colspan="6" style="border: 1px solid black; padding: 5px;"> <table style="width: 100%; border-collapse: collapse;"> <tr> <td colspan="6" style="text-align: center; border-bottom: 1px solid black;"><b>FA Item Type Setup</b> <span style="float: right;">Find   View All First 1 of 1 Last</span></td> </tr> <tr> <td>*Effective Date:</td> <td><input type="text" value="06/03/2008"/> <small>BT</small></td> <td>*Status:</td> <td><input type="text" value="Active"/></td> <td colspan="2" style="text-align: right;"><input type="button" value="Copy"/></td> </tr> <tr> <td>*Description:</td> <td><input type="text" value="FEDERAL PERKINS LOAN #1"/></td> <td>Short Description:</td> <td><input type="text" value="Perkins"/></td> <td colspan="2"></td> </tr> <tr> <td>Financial Aid Type:</td> <td><input type="text" value="Loan"/></td> <td>Source:</td> <td><input type="text" value="Federal"/></td> <td>Federal ID:</td> <td><input type="text" value="Perkins Ln"/></td> </tr> <tr> <td>Aggregate Area:</td> <td><input type="text" value="PERKINS"/> <small>Q</small></td> <td>Institution Reporting Cd:</td> <td><input type="text"/></td> <td><b>MPN Required</b></td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td>Comments:</td> <td colspan="5"><input type="text"/></td> </tr> </table> </td> </tr> </table> </div>	<a href="#">FA Item Type 1</a>   <a href="#">FA Item Type 2</a>   <a href="#">FA Item Type 3</a>   <a href="#">FA Item Type 4</a>   <a href="#">FA Item Type 5</a>   <a href="#">FA Item Type 6</a>						SetID: MISUB						Item Type: 910000002300 <a href="#">FEDERAL PERKINS LOAN #1</a>						Aid Year: 2011 Federal Aid Year 2010-2011						<table style="width: 100%; border-collapse: collapse;"> <tr> <td colspan="6" style="text-align: center; border-bottom: 1px solid black;"><b>FA Item Type Setup</b> <span style="float: right;">Find   View All First 1 of 1 Last</span></td> </tr> <tr> <td>*Effective Date:</td> <td><input type="text" value="06/03/2008"/> <small>BT</small></td> <td>*Status:</td> <td><input type="text" value="Active"/></td> <td colspan="2" style="text-align: right;"><input type="button" value="Copy"/></td> </tr> <tr> <td>*Description:</td> <td><input type="text" value="FEDERAL PERKINS LOAN #1"/></td> <td>Short Description:</td> <td><input type="text" value="Perkins"/></td> <td colspan="2"></td> </tr> <tr> <td>Financial Aid Type:</td> <td><input type="text" value="Loan"/></td> <td>Source:</td> <td><input type="text" value="Federal"/></td> <td>Federal ID:</td> <td><input type="text" value="Perkins Ln"/></td> </tr> <tr> <td>Aggregate Area:</td> <td><input type="text" value="PERKINS"/> <small>Q</small></td> <td>Institution Reporting Cd:</td> <td><input type="text"/></td> <td><b>MPN Required</b></td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td>Comments:</td> <td colspan="5"><input type="text"/></td> </tr> </table>						<b>FA Item Type Setup</b> <span style="float: right;">Find   View All First 1 of 1 Last</span>						*Effective Date:	<input type="text" value="06/03/2008"/> <small>BT</small>	*Status:	<input type="text" value="Active"/>	<input type="button" value="Copy"/>		*Description:	<input type="text" value="FEDERAL PERKINS LOAN #1"/>	Short Description:	<input type="text" value="Perkins"/>			Financial Aid Type:	<input type="text" value="Loan"/>	Source:	<input type="text" value="Federal"/>	Federal ID:	<input type="text" value="Perkins Ln"/>	Aggregate Area:	<input type="text" value="PERKINS"/> <small>Q</small>	Institution Reporting Cd:	<input type="text"/>	<b>MPN Required</b>	<input checked="" type="checkbox"/>	Comments:	<input type="text"/>				
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<p>If you have an item type that will only be assigned to students who do not have an MPN, you will want to include a Perkins MPN Checklist <b>FAPERK</b>.</p> <p>The checklist will be created when the loan is originated.</p> <p>If you have an item type that</p>	<div style="border: 1px solid black; padding: 5px;"> <table style="width: 100%; border-collapse: collapse;"> <tr> <td colspan="6" style="text-align: center; border-bottom: 1px solid black;"> <a href="#">Loan Type Table</a>   <a href="#">CommonLine/NSLDS Xref</a>   <a href="#">Direct Loan Options</a>   Checklist Setup                 </td> </tr> <tr> <td colspan="3">Aid Year: 2010 Federal Aid Year 2009-2010</td> <td colspan="3">Academic Institution: MISUB</td> </tr> <tr> <td colspan="6" style="border-top: 1px solid black;"></td> </tr> <tr> <td colspan="3">Loan Type: PER1 Federal Perkins Loan #1</td> <td colspan="3">Checklist: <input type="text" value="FAPERK"/> <small>Q</small> FAPERKINS</td> </tr> <tr> <td colspan="3">Loan Program: Perkins</td> <td colspan="3">Loan Category:</td> </tr> </table> </div>	<a href="#">Loan Type Table</a>   <a href="#">CommonLine/NSLDS Xref</a>   <a href="#">Direct Loan Options</a>   Checklist Setup						Aid Year: 2010 Federal Aid Year 2009-2010			Academic Institution: MISUB									Loan Type: PER1 Federal Perkins Loan #1			Checklist: <input type="text" value="FAPERK"/> <small>Q</small> FAPERKINS			Loan Program: Perkins			Loan Category:																																						
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will only be assigned to students who already have an MPN, you will not want to include an MPN Checklist.

You do not need to enter checklists for Entrance Loan Counseling; that is done by the **NDU Loan Counseling Update** process.

## Set Up SACR > Product Related > Financial Aid > Disbursement > Define Item Type Rules

If you are requiring a checklist for a particular item type, that requirement must be reflected in the disbursement rules.

Checklist **FAPKCN** is created by the NDU Loan Counseling Update process and should be entered on ALL Perkins item types.

North Dakota University System  
Campus Solutions – Financial Aid  
Perkins MPN Functionality

Set Up SACR > Product Related > Financial Aid > Loans > Setup Perkins MPN Options

Add a value and complete the following

1. **Effective Date** can be today's date.
2. **MPN Type** would be *Multi-Year* unless you want a new MPN signed each year.
3. **MPN Format** is *paper*.
4. **Create Option** could be either *Offered* or *Accepted* (Do you want an MPN to print when the award is offered or not until it is accepted?)
5. **Create Communication** should be checked if you want to see in Communications that an MPN has printed. It works fine unchecked.
6. In **School Information**, indicate the school information you want reflected on the MPN.
7. Save.

### Perkins MPN Setup

Institution: MISUB Dakota College at Bottineau

MPN Options		Find   View All	First	1 of 1	Last
*Effective Date:	03/28/2008				
*MPN Type:	Multi-Year				
*MPN Format:	Paper				
Create Option:	Offered				
		<input checked="" type="checkbox"/> Create Communication			
School Information					
School Name:	Dakota College at Bottineau				
Address 1:	105 Simrall Boulevard				
Address 2:					
City:	Bottineau				
State:	ND				
Zip Code:	58318				

# North Dakota University System Campus Solutions – Financial Aid Perkins MPN Functionality

## Packaging Plan Set Up

Set Up SACR > Product Related > Financial Aid > Awards > Packaging Plan																																	
<p>Add a Row</p>	<div style="border: 1px solid #ccc; padding: 5px;"> <div style="display: flex; justify-content: space-between; border-bottom: 1px solid #ccc; margin-bottom: 5px;"> <span>Packaging Plan</span> <span>FM Target</span> <span>IM Target</span> <span>Equity Rule</span> <span>Packaging Limits</span> <span>Packaging Rules 1</span> <span>Packaging Rules 2</span> </div> <div style="font-size: 0.8em; margin-bottom: 5px;">           Academic Institution: NDSCS N.Dakota State College Science      Aid Year: 2011            Academic Career: UGRD Undergraduate      Plan ID: UGRDALLFED         </div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;"> <span style="float: right;">Find    First 1 of 2    Last</span> </div> <div style="margin-bottom: 5px;">           *Effective Date: <input type="text" value="07/26/2010"/>    *Status: <input type="text" value="Active"/>    <span style="float: right; border: 1px solid red; padding: 2px;">+</span> </div> <div style="margin-bottom: 5px;">           Processing Order: <input type="text" value="10"/> </div> <div style="margin-bottom: 5px;">           *Award Period: <input type="text" value="Academic"/> </div> <div style="margin-bottom: 5px;">           *Description: <input type="text" value="All Federal Aid"/> </div> <div style="margin-bottom: 5px;">           Short Description: <input type="text" value="AllFedAid"/> </div> <div style="margin-bottom: 5px;">           Selection Criteria: <input type="text" value="UGRDPREDEADL"/> <a href="#">Equation Detail</a> </div> </div>																																
<p>If you do not want returning Perkins borrowers to receive a particular checklist and have created an item type that does not include the checklist:</p> <p>On <b>Packaging Rules 1</b> tab, add a row and enter a second Perkins item type number with a <b>Sequence Nbr</b> that falls between the first Perkins award and the next award on the plan.</p> <p><b>Selection Criteria</b>  <i>NDUPERKMPN_F</i> checks to see whether the student does NOT have an MPN and returns True (i.e., package using this item type) if that is the case. Use this <b>Selection Criteria</b> to identify the first time borrowers who need the loan type with the checklists associated with it.</p> <p><i>NDUPERKMPN_T</i> checks to see whether the student has an MPN and returns True (i.e., package using this item type) if the student does have an MPN.</p> <p>If you need custom <b>Selection Criteria</b> set up for you institution, please contact Campus Solutions.</p>	<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> <div style="display: flex; justify-content: space-between; border-bottom: 1px solid #ccc; margin-bottom: 5px;"> <span>Sequence Nbr: <input style="border: 1px solid red;" type="text" value="30"/></span> <span>% of Total Package <input type="text" value="100.0"/></span> <span><a href="#">Spending Limit Preferences</a> <span style="float: right; border: 1px solid red; padding: 2px;">+</span></span> </div> <div style="margin-bottom: 5px;"> <input type="radio"/> Gap         </div> <div style="margin-bottom: 5px;"> <input checked="" type="radio"/> Item Type <input type="text" value="910000002300"/> <a href="#">Federal Perkins Loan</a> </div> <div style="margin-bottom: 5px;"> <input type="radio"/> Related Item Group <input type="text"/> </div> <div style="margin-bottom: 5px;">           Selection Criteria: <input style="border: 1px solid red;" type="text" value="NDUPERKMPN_F"/> <a href="#">Equation Detail</a> </div> <table border="1" style="width: 100%; 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North Dakota University System  
Campus Solutions – Financial Aid  
Perkins MPN Functionality

**Procedure**

<p>Run this process each time you package aid.</p> <p>On first use, add a run control. For <b>Printer Name</b>, find your printer from the drop down. Note you can add rows for different careers, and can use this screen to process all students who meet the criteria or, with the <b>Student Override</b> checked, individual students.</p> <p>You can choose to sort the printed MPNs by Name, SSN or EmplID.</p>	<p style="text-align: center;"><b>Financial Aid &gt; Loans &gt; Print Perkins MPN</b></p> <p><b>Print Perkins Master Promissory Note</b></p> <p>Run Control ID: Print_Perkins_MPN_dj <span style="float: right;"><a href="#">Report Manager</a> <a href="#">Process Monitor</a> <span style="border: 1px solid black; padding: 2px 5px;">Run</span></span></p> <div style="border: 1px solid black; padding: 5px;"> <p style="text-align: right; font-size: small;">Find   View All    First 1 of 1 Last</p> <p>*Institution: MISUB    *Printer Name: MWP1MSU-B-MPNOTE    <input type="checkbox"/> Print Via Script</p> <p>*Aid Year: 2010    Sort by: Name</p> <p>Career: UGRD</p> <p><input type="checkbox"/> Student Override</p> </div>																					
<p>Record the MPN <b>Signature Date</b>. The <b>Received Date</b> will default to today's date unless you specify something different.</p> <p>If the MPN will not be used (for example, a summer award was made after printing the MPN for the following fall), then enter a <b>Canceled Date</b> to invalidate the MPN and allow you to print the summer MPN.</p> <p>The <b>MPN Expire Date</b> will be one year from the signature date until disbursement. After disbursement, the <b>MPN Expire Date</b> will change to 10 years from the signature date.</p> <p>A <b>Close Date</b> may be entered when the MPN is sent to the <b>Student Loan Service Center</b> to prevent further loans from being disbursed based on this MPN.</p>	<p style="text-align: center;"><b>Financial Aid &gt; Loans &gt; View Perkins MPN</b></p> <p style="text-align: center;">( Tracking Information    <b>Data Fields</b>    References )</p> <p>ID: 080C    Name, Student</p> <p>Institution: MISUB</p> <p>MPN Seq: 1</p> <div style="border: 1px solid black; padding: 5px;"> <p style="text-align: center; background-color: #f0f0f0; margin: 0;"><b>MPN Information</b></p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 30%;">MPN Type:</td> <td style="width: 35%;">Multi-Year</td> <td style="width: 35%;">MPN Expire Date:</td> </tr> <tr> <td>MPN Format:</td> <td>Paper</td> <td>MPN Closed Date: <input type="text"/></td> </tr> <tr> <td>Created Date:</td> <td colspan="2">07/09/2009 10:30:41</td> </tr> <tr> <td>Aid Year:</td> <td colspan="2">2010</td> </tr> <tr> <td><b>Signature Date:</b></td> <td><input style="border: 2px solid red;" type="text"/></td> <td><input type="text"/></td> </tr> <tr> <td>Received Date:</td> <td><input type="text"/></td> <td><input type="text"/></td> </tr> <tr> <td>Canceled Date:</td> <td><input type="text"/></td> <td><input type="text"/></td> </tr> </table> </div> <p><b>Do not attempt to backdate the Signature Date to a date before the date the MPN was printed.</b></p>	MPN Type:	Multi-Year	MPN Expire Date:	MPN Format:	Paper	MPN Closed Date: <input type="text"/>	Created Date:	07/09/2009 10:30:41		Aid Year:	2010		<b>Signature Date:</b>	<input style="border: 2px solid red;" type="text"/>	<input type="text"/>	Received Date:	<input type="text"/>	<input type="text"/>	Canceled Date:	<input type="text"/>	<input type="text"/>
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# North Dakota University System Campus Solutions – Financial Aid Perkins MPN Functionality

On Tab 2, you have the functionality to reprint an MPN for a single student.

Select the appropriate printer from the **Printer Name** drop-down and select the **Reprint Promissory Note** button.

## Financial Aid > Financial Aid Status

A link will appear at the bottom of this page when an MPN has been printed. Clicking on the link will allow you to see if the student has signed an MPN and whether it has expired.

## Financial Aid > Loans > View Perkins Loan Indebtedness

A Perkins loan history is also provided at this navigation.

Aid Year	Expected Award	Perkins Loan Amount
2010	2983.00	\$2,983.00
2009	1979.00	\$1,979.00
<b>Total Loan Indebtedness:</b>	<b>4962.00</b>	<b>\$4,962.00</b>

North Dakota University System  
Campus Solutions – Financial Aid  
Perkins MPN Functionality

NDU_Applications > NDU Financial Aid > Report > NDU Perkins Missing MPN Report	
<p>This report lists students who have an accepted Perkins award amount greater than zero, and the MPN is not cancelled, is not printed or is not signed.</p> <p>Used to identify students who have a Perkins Award, but do not have a signed MPN documented on the Perkins MPN screen.</p>	<div style="border: 1px solid black; padding: 5px;"> <p>Ndu0108farnctl</p> <hr/> <p>Run Control ID: NDU_Perkins_Missing_MPN_dj      <a href="#">Report Manager</a>   <a href="#">Process Monitor</a>   <span style="background-color: yellow; border: 1px solid black; padding: 2px;">Run</span></p> <p style="text-align: center;">User ID: djunk</p> <p>*Academic Institution: <input type="text" value="NDSU1"/> <input type="button" value="Q"/></p> <p>*Aid Year: <input type="text" value="2010"/> <input type="button" value="Q"/></p> </div>
NDU_Applications > NDU Financial Aid > Report > Missing Loan Checklist Report	
<p>This report helps you find students who are missing checklists required by the disbursement rules for item types specified on the run control.</p> <p>If the checklists for this loan should be re-done each year (i.e., annual requirements), then check the “annual Requirement” box and it will look to see if the checklist has been created this aid year.</p>	<div style="border: 1px solid black; padding: 5px;"> <p>Ndu0078farnctl</p> <hr/> <p>Run Control ID: NDU_Missing_Loan_checklist</p> <p style="text-align: center;">User ID: djunk</p> <p>*Academic Institution: <input type="text" value="MASU1"/> <input type="button" value="Q"/>      Mayville State University</p> <p>*Aid Year: <input type="text" value="2011"/> <input type="button" value="Q"/></p> <p>Annual requirement <input type="checkbox"/></p> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p style="background-color: #4a7ebb; color: white; padding: 2px;">Honor Letters and Award Codes</p> <p style="text-align: right; font-size: small;">Find   View 1    First ◀ 1-2 of 2 ▶ Last</p> <p>*Item Type: <input type="text" value="91000000230"/> <input type="button" value="Q"/>      <input type="button" value="+"/> <input type="button" value="-"/></p> <hr/> <p>*Item Type: <input type="text" value="91000000231"/> <input type="button" value="Q"/>      <input type="button" value="+"/> <input type="button" value="-"/></p> </div> </div>