Introduction

Transaction TX0M (Lender/Guarantor) is used to maintain information about the lender's eligibility to make loans under a specific loan program, working with a specific guarantor.

The guarantor-specific information included in this transaction is the ID and name of the guarantor and the ID used by the lender when reporting to the guarantor. All other data in this transaction relates to the lender/guarantor combination.

In order to add records in this transaction, the lender must first be associated with the specific loan program that will be in the new record. This means that transaction TX0J, Lender Status, must be completed first, then transaction TX0M can be completed.

Add Lender/Guarantor Information

Lender/Guarantor data is added and maintained on the **LENDER/ GUARANTOR MAINTENANCE** screen (TXX0O). Use the following steps to access that screen.

1. At the **MAIN MENU** (J0X01) select **COMMON MODULES**.

2. Press Enter.

The **SUBSYSTEM LEVEL COMMON MODULES** screen (J0X06) is displayed.

1. Select **INSTITUTION DEMOGRAPHIC MENU**.

2. Press Enter.

The **SUBSYSTEM LEVEL INSTITUTION DEMOGRAPHIC MENU** (J0X02) is displayed.

1. Type **A** (Add) in the **MODE** field and **TX0M** (Lender/Guarantor) in the **TRANSACTION ID** field.

2. Press Enter.

The **LENDER/GUARANTOR SEARCH** screen (TXX2R) is displayed.

1. In the **LENDER** field enter the eight-digit ID of the lender. *This is a required field.*

2. In the **LOAN PROGRAM** field enter the six-character ID of the associated loan program. *This is a required field.*

3. In the **GUARANTOR** field enter the six-digit ID of the associated guarantor. *This is a required field.*

4. Press Enter.

The **LENDER/GUARANTOR MAINTENANCE** screen (TXX0O) is displayed.

The following message is displayed at the bottom of the screen: **01021 ADD NECESSARY DATA AND PRESS ENTER**.

The **LENDER**, **LOAN PROGRAM** and **GUARANTOR** fields are populated with the data entered on the search screen. The other fields are blank and unprotected so that data can be added.

1. In the **REPORTING CODE** field, enter the code assigned to the lender by the guarantor. *This is a required field.*

    If the guarantor does not assign its own reporting code, this number should be the ID assigned to the Lender by the US Department of Education.

2. In the **APPROVAL STATUS** field, enter the one-character code that indicates the lender's eligibility for the loan program. Valid values are **E** (Eligible) and **I** (Ineligible). The text description of the code is supplied by the system when Enter is pressed. *This is a required field.*

3. In the **STATUS DATE** field, enter the date the approval status became effective, in MM DD YY format. *This is a required field.*

4. In the **STATUS REASON** field, enter the one-character code that indicates the reason the lender is ineligible. The text description of the reason will be supplied by the system when Enter is pressed. *If the approval status is **I** (Ineligible), the reason code is required.*

5. Press Enter.

The following message displays at the bottom of the screen: **01004 RECORD SUCCESSFULLY ADDED**.

Change or View Lender/Guarantor Information

Lender/Guarantor data is added and maintained on the **LENDER/ GUARANTOR MAINTENANCE** screen (TXX0O). Use the following steps to access that screen.

1. At the **MAIN MENU** (J0X01) select **COMMON MODULES**.

2. Press Enter.

The **SUBSYSTEM LEVEL COMMON MODULES** screen (J0X06) is displayed.

1. Select **INSTITUTION DEMOGRAPHIC MENU**.

2. Press Enter.

The **SUBSYSTEM LEVEL INSTITUTION DEMOGRAPHIC MENU** (J0X02) is displayed.

1. Type **C** (Change) or **I** (Inquiry) in the **MODE** field and **TX0M** (Lender/Guarantor) in the **TRANSACTION ID** field.

    NOTE: Change mode is used in this example.

2. Press Enter.

The **LENDER/GUARANTOR SEARCH** screen (TXX2R) is displayed.

1. In the **LENDER** field enter the eight-digit ID of the lender. *This is a required field.*

2. In the **LOAN PROGRAM** field enter the six-character ID of the associated loan program. *This is an optional field.*

3. In the **GUARANTOR** field enter the six-digit ID of the associated guarantor. *This is an optional field.*

4. Press Enter.

The **LENDER/GUARANTOR LOAN PROGRAM SELECTION** screen (TXX3G) is displayed.

This screen does not display if only one loan program is associated with the lender.

1. In the **SELECTION** field, enter the number that corresponds to the desired loan program.

2. Press Enter.

The **LENDER/GUARANTOR GUARANTOR SELECTION** screen (TXX0N) is displayed.

This screen does not display if only one guarantor is associated with the lender/loan program combination selected.

1. In the **SELECTION** field, enter the number that corresponds to the desired guarantor.

2. Press Enter.

The **LENDER/GUARANTOR MAINTENANCE** screen (TXX0O) is displayed.

The following message is displayed at the bottom of the screen: **01022 MAKE DESIRED DATA CHANGES AND PRESS ENTER**.

1. Tab to the required fields and make the necessary changes.

The **LENDER**, **LOAN PROGRAM** and **GUARANTOR** fields are populated with the data entered on the search screen. The other fields are blank and unprotected so that data can be added.

The **REPORTING CODE** field displays the code assigned to the lender by the guarantor. *This is a required field.*

If the guarantor does not assign its own reporting code, this number should be the ID assigned to the Lender by the US Department of Education.

The **APPROVAL STATUS** field displays the one-character code that indicates the lender's eligibility for the loan program. Valid values are **E** (Eligible) and **I** (Ineligible). The text description of the code is supplied by the system when Enter is pressed. *This is a required field.*

The **STATUS DATE** field displays the date the approval status became effective, in MM DD YY format. *This is a required field.*

The **STATUS REASON** field displays the one-character code that indicates the reason the lender is ineligible. The text description of the reason will be supplied by the system when Enter is pressed. *If the approval status is I (Ineligible), the reason code is required.*

2. Press Enter.

The following message is displayed at the bottom of the screen: **01005 RECORD SUCCESSFULLY CHANGED**.

   NOTE: If code values that display descriptions are changed, the text will be updated once Enter is pressed.

Delete Lender/Guarantor Information

1. At the **MAIN MENU** (J0X01) select **COMMON MODULES**.

2. Press Enter.

The **SUBSYSTEM LEVEL COMMON MODULES** screen (J0X06) is displayed.

1. Select **INSTITUTION DEMOGRAPHIC MENU**.

2. Press Enter.

The **SUBSYSTEM LEVEL INSTITUTION DEMOGRAPHIC MENU** (J0X02) is displayed.

1. Type **D** (Delete) in the **MODE** field and **TX0M** (Lender/Guarantor) in the **TRANSACTION ID** field.

2. Press Enter.

The **LENDER/GUARANTOR SEARCH** screen (TXX2R) is displayed.

1. In the **LENDER** field enter the eight-digit ID of the lender. *This is a required field.*

2. In the **LOAN PROGRAM** field enter the six-character ID of the associated loan program. *This is an optional field.*

3. In the **GUARANTOR** field enter the six-digit ID of the associated guarantor. *This is an optional field.*

4. Press Enter.

The **LENDER/GUARANTOR LOAN PROGRAM SELECTION** screen (TXX3G) is displayed.

This screen does not display if only one loan program is associated with the lender.

1. In the **SELECTION** field, enter the number that corresponds to the desired loan program.

2. Press Enter.

The **LENDER/GUARANTOR GUARANTOR SELECTION** screen (TXX0N) is displayed.

This screen does not display if only one guarantor is associated with the lender/loan program combination selected.

1. In the **SELECTION** field, enter the number that corresponds to the desired guarantor.

2. Press Enter.

The **LENDER/GUARANTOR MAINTENANCE** screen (TXX0O) is displayed.

The following message is displayed at the bottom of the screen: **01023 PRESS ENTER TO DELETE**.

1. Press Enter.

The following message displays at the bottom of the screen: **01006 RECORD SUCCESSFULLY DELETED**.