

Certification Overview

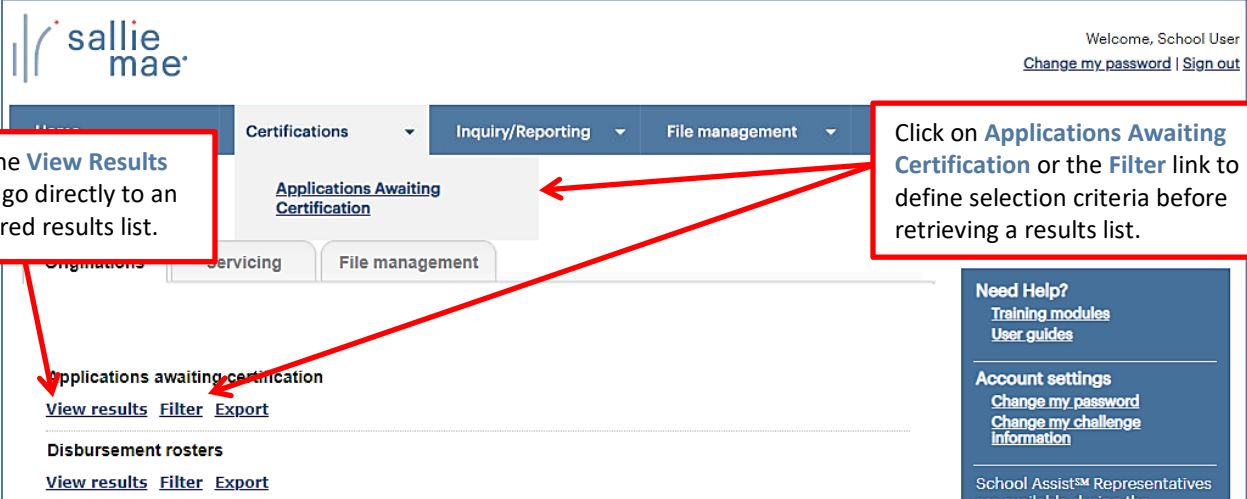
The Certify Applications functionality allows a school user to define the criteria (loan period date range, loan product, etc.) for retrieving loan applications awaiting certification and then to perform the certification online.

Running an Applications Awaiting Certification Query

How to retrieve applications awaiting certification:

1. Do one of the following:
 - Hover your cursor over the **Certifications** option on the Menu Bar of any OpenNet Web Loan Delivery page, and then click on **Applications Awaiting Certification**.
 - On the **Originations** tab of the School Home Page, click the **Filter** link on the **Applications Awaiting Certification** tile.

SHORTCUT: To go directly to a list of all applications awaiting certification, click on the **View Results** link on the **Applications Awaiting Certification** tile. The results will not be filtered on loan period, loan product, or school campus. If you wish to bypass the results page and instead export the results to a file you can save to your computer, click on the **Export** link on the **Applications Awaiting Certification** tile.



The screenshot shows the Sallie Mae user interface. At the top left is the Sallie Mae logo. At the top right, it says "Welcome, School User" with links for "Change my password" and "Sign out". Below this is a navigation menu with "Certifications", "Inquiry/Reporting", and "File management". The "Certifications" menu is expanded, showing "Applications Awaiting Certification" as the selected option. Below the menu, there are several tiles. The "Applications awaiting certification" tile is highlighted and contains links for "View results", "Filter", and "Export". Below this tile is a "Disbursement rosters" tile with similar links. On the right side of the interface, there is a "Need Help?" section with links for "Training modules" and "User guides", and an "Account settings" section with links for "Change my password", "Change my challenge information", and "School AssistSM Representatives".

The Awaiting Certification Selection page displays.

(Continued on the next page)

Run a previously saved query using the **Previously Saved Queries** section.

Run a quick search using the **Quick Search** section.

Awaiting certification selection

This query will retrieve all applications awaiting certification. There are three ways to define your query. The PREVIOUSLY SAVED QUERIES section allows you to select and submit a previously saved query, modify a saved query or delete a query. To run a new query, enter your selections below. For additional query options, you can select Custom Report from the Inquiry/Reports menu.

Previously saved queries

Select the name of the saved query you want to submit, revise, or delete.

- No selection -

Quick search

Enter an SSN to search for a specific student or borrower, or a Query Confirmation Number to retrieve the results from a previously submitted query.

SSN:

Confirmation number:

Submit saved query
View/Modify
Delete
Submit quick search

Filter criteria

	Defined range	From date	To date	
Certification requested:	- All - <input type="text"/>	or	<input type="text"/>	<input type="text"/> (Ex: 11/22/3333)
	<input checked="" type="checkbox"/> Include loans with blank certification requested dates			
	Defined range	From date	To date	
Loan period:	- All - <input type="text"/>	or	<input type="text"/>	<input type="checkbox"/> Exact match (Ex: 11/22/3333)
	<input type="checkbox"/> Include loans with blank loan periods			

If you elect to include blank loan periods in your filter criteria, you must use the email confirmation process detailed in the QUERY OPTIONS section.

To make multiple selections from the list boxes, hold down control key and click with mouse.

School campus:

Loan products:

Bar Study Loan
Career Training Smart Option Student Loan (930)
Clear Advantage Student Loan made by Sallie Mae (W06)

Sort results by:

Query options

To save the query criteria, enter a name in the Query name box and select Save or Save and submit. To be notified when query results are ready, select the Send e-mail notification checkbox then select Submit.

Query name:

E-mail address: Send e-mail notification when query is complete

Submit
Save and submit
Save
Clear all criteria

Run a new query using the remainder of the page, beginning with the **Filter Criteria** section.

2. Use one of three methods to define the query you want to run.

(Continued on the next page)

Method 1: Previously Saved Query:

1. Locate the **Previously Saved Queries** section on the Awaiting Certification Selection page.

Previously saved queries

Select the name of the saved query you want to submit, revise, or delete.

- No selection -

Submit saved query
View/Modify
Delete

2. Select a previously saved query.
3. Click the **Submit Saved Query** button

NOTE: You can modify or delete a saved query using the **View/Modify or Delete** buttons.

The Awaiting Certification Results page displays with record information for applications that meet the criteria defined in the saved query.

Method 2: Quick Search:

1. Locate the **Quick Search** section on the Awaiting Certification Selection page.

Quick search

Enter an SSN to search for a specific student or borrower, or a Query Confirmation Number to retrieve the results from a previously submitted query.

SSN:

Confirmation number:

Submit quick search

(Continued on the next page)

- Use the **Confirmation Number** text box to retrieve results from a specific query that was submitted previously for offline processing.
- Click the **Submit Quick Search** button.

The Awaiting Certification Results page displays with record information for applications awaiting certification for the specified borrower or from the previously submitted query.

Method 3: New Query:

- Locate the Filter Criteria section on the Awaiting Certification Selection page. All of the options from there to the bottom of the page can be used to submit and/or save a new query.

Filter criteria

Defined range From date To date

Certification requested: or (Ex: 11/22/3333)

Include loans with blank certification requested dates

Defined range From date To date

Loan period: or Exact match (Ex: 11/22/3333)

Include loans with blank loan periods

If you elect to include blank loan periods in your filter criteria, you must use the email confirmation process detailed in the QUERY OPTIONS section.

To make multiple selections from the list boxes, hold down control key and click with mouse.

School campus:

Loan products:

Sort results by:

Query options

To save the query criteria, enter a name in the Query name box and select Save or Save and submit. To be notified when query results are ready, select the Send e-mail notification checkbox then select Submit.

Query name:

E-mail address: Send e-mail notification when query is complete

- (Optional) Select a predefined date range or define your own using the **Certification Requested** text boxes. The default range includes all stored records.

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3. (Optional) Select a predefined date range or define your own using the **Loan Period** text boxes. The default range includes all stored records.
 4. (Optional) Use the **School Campus** and **Loan Products** filters as needed and sort the results if desired. By default, results will sort by Borrower SSN.
 5. If you plan to save the query, enter a name for it into the **Query Name** text box (under the **Query Options** section). You can also enter your email address to run the query offline and receive an email notification when the query is complete.
 6. Click the **Submit, Save** (to save for later use but not run at this time), or **Save and Submit** button.
- The Awaiting Certification Results page displays with record information for applications that match the query criteria.

Awaiting certification results

[Export to file>>](#)

To certify an application, [click] on the CERTIFY APP link next to the record you want to certify.

Report run Friday, April 3, 2020 at 2:53:50 PM ET

Records 1-4 (of 4)

Borrower/ Student SSN	Borrower/ Student name	Loan product/ Alt loan prgm cd	School ID	CommonLine unique ID/ Loan period	Lender ID	Borrower requested amount	Certification requested	
666-52-5210	ADAMS, ALICE	SMART OPTION STUDENT LOAN (091)	00000000	899984AT100899205 09/15/2020-05/15/2021	900905	\$15,000.00	03/30/2020	<div style="border: 2px solid red; padding: 5px; display: inline-block; margin-bottom: 5px;">Click the Certify App button to certify the application.</div> <div style="display: flex; flex-direction: column; gap: 5px;"> <div style="background-color: #0056b3; color: white; padding: 5px; border-radius: 5px;">Certify app</div> <div style="background-color: #0056b3; color: white; padding: 5px; border-radius: 5px;">Print</div> <div style="background-color: #0056b3; color: white; padding: 5px; border-radius: 5px;">Cancel</div> </div>
666-52-5212	ANDERSON, CATHY	SMART OPTION STUDENT LOAN (091)	00000000	899984AT100899170 08/15/2020-05/15/2021	900905	\$12,000.00	03/30/2020	<div style="display: flex; flex-direction: column; gap: 5px;"> <div style="background-color: #0056b3; color: white; padding: 5px; border-radius: 5px;">Certify app</div> <div style="background-color: #0056b3; color: white; padding: 5px; border-radius: 5px;">Print</div> <div style="background-color: #0056b3; color: white; padding: 5px; border-radius: 5px;">Cancel</div> </div>
666-52-5213	ANDERSON, CHRIS	SMART OPTION STUDENT LOAN (091)	00000000	899984AT100899198 09/15/2019-05/15/2020	900905	\$25,000.00	03/30/2020	<div style="display: flex; flex-direction: column; gap: 5px;"> <div style="background-color: #0056b3; color: white; padding: 5px; border-radius: 5px;">Certify app</div> <div style="background-color: #0056b3; color: white; padding: 5px; border-radius: 5px;">Print</div> <div style="background-color: #0056b3; color: white; padding: 5px; border-radius: 5px;">Cancel</div> </div>
666-52-5220	BORROWER, JOHN J	SALLIE MAE MBA LOAN (926)	00000000	899984AT100899202 09/15/2020-05/15/2021	900916	\$25,000.00	03/30/2020	<div style="display: flex; flex-direction: column; gap: 5px;"> <div style="background-color: #0056b3; color: white; padding: 5px; border-radius: 5px;">Certify app</div> <div style="background-color: #0056b3; color: white; padding: 5px; border-radius: 5px;">Print</div> <div style="background-color: #0056b3; color: white; padding: 5px; border-radius: 5px;">Cancel</div> </div>

Return to selection - keep same criteria

Return to selection - clear all criteria

On this page, you can:

- Provide certification information via the **Certify App** button.
- Print a copy of the loan documents via the **Print** button.
- Cancel the application via the **Cancel** button.
- Export the search results data to a comma separated values (.CSV) or Excel file via the **Export to File** link.

Exporting Awaiting Certification Query Results

How to export the awaiting certification results:

1. On the Awaiting Certification Results page, click the **Export to File** link.

The Export to File page displays.

NOTE: The export functionality is also available from the **Originations** tab of the OpenNet Home Page by clicking the Export link on the **Applications Awaiting Certification** tile, which initiates an export for all applications needing certification for all loan periods and all loan products for all school campuses to which you have access. Other types of OpenNet inquiries also support the export functionality.

Export To File

The Export feature allows you to save data to your computer or open the data within your browser so that the information can be viewed in Excel or Access. This option allows you to tailor the information to your reporting needs. You will need to select the items you want to export from the list of columns. You may change the order of columns by clicking on the MOVE UP or MOVE DOWN buttons.

Available Columns:

- Alternative Loan Program Code
- Application ID
- Application Received Date
- Borrower Citizenship
- Borrower Date of Birth
- Borrower First Name
- Borrower Last Name/Suffix
- Borrower Middle Initial
- Borrower Requested Amount
- Borrower SSN
- Certification Requested Date
- Commonline Loan Sequence Number
- Commonline Unique ID
- Credit Expiration Date
- Enrollment Status
- Full Lender ID

Export Columns:

Buttons: Add >, Add All >>, < Remove, << Remove All, Move Up, Move to Top, Move Down, Move to Bottom

To save the query selection criteria and export criteria, enter a name in the Query Name field. If the query already has a name, clicking on Save or Save and Export will add the criteria to the existing query.

Query Name:

Export Format: **Comma Separated (CSV)**

Include Header Row: Yes No

Buttons: Export, Save and Export, Save, Previous

2. Add and arrange the data fields (columns) to be exported using the available functionality.
3. Select the format of the exported file using the **Export Format** drop-down list. If you want to save the query criteria for use again in the future as well as exporting the query results, enter a name for the query in the **Query Name** field.
4. Click the **Export** button.

Your browser displays a series of dialog boxes and prompts to let you view or save the file.

Certify an Application

- To certify an application, click the **Certify App** button beside the corresponding entry on the Awaiting Certification Results page.

The Enter School Certification page displays. The specific fields displayed on the page will vary depending on the loan program associated with the certification.

For example, the Enter School Certification page for Smart Option Student Loans:

Enter school certification

Smart Option Student Loan (091) [Borrower](#) [Certification](#) [Disbursement](#)

Borrower information [Return to top](#)

Fields marked with an asterisk(*) are required to continue processing. For your convenience, blank fields are shaded in yellow and should be completed unless otherwise noted.

Social Security number: 666-52-5210
 Date of birth: 03/01/1997
 Name: ALICE ADAMS
 Email address: adams@test.com

Permanent address

Street address 1: 45 River St
 Street address 2:
 City: Boston
 State: MA Zip code: 02108
 Primary phone number: 5556667777 Cell: Home:

Certification information [Return to top](#)

Initial values set:

School name: NEW UNIV-MAIN CAMPUS
 School code / branch: 000000-00
 Lender name: Sallie Mae

Academic period for the loan: * From To (ex: mm/dd/yyyy)

Grade level: *

Course of study: *

Enrollment status: *

Anticipated graduation date: * (ex: mm/dd/yyyy)

Requested loan amount: \$15,000.00

Certified loan amount: * \$.00

The approved amount will be the lesser of the borrower requested amount, cosigner requested amount, and school certified amount.

School use only:

Submit certification option: View submission results online

(Continued on the next page)

School disbursement information [Return to top](#)

Please allow for the consumer's Right To Cancel period when setting your disbursement date.

	Disb date (ex: mm/dd/yyyy)	Disb amount (ex: 3000)	Hold/Release
Disb 1: *	<input style="background-color: yellow;" type="text"/>	* \$ <input style="background-color: yellow;" type="text"/> .00	* -- Select One <input type="text"/>
Disb 2:	<input type="text"/>	\$ <input type="text"/> .00	-- Select One <input type="text"/>
Disb 3:	<input type="text"/>	\$ <input type="text"/> .00	-- Select One <input type="text"/>
Disb 4:	<input type="text"/>	\$ <input type="text"/> .00	-- Select One <input type="text"/>

As an authorized representative of the school identified above, I hereby certify the following: (i) the borrower is eligible for the loan identified in this certification; (ii) the information completed in this school certification is accurate; (iii) the Total Certified Amount does not exceed the student's cost of attendance minus other financial aid; (iv) that school will notify Sallie Mae if the student withdraws from the school; (v) if applicable, then prior to certification the school has complied with the disclosure requirements in Section 626(i) and all other provisions of the Student Lending Accountability, Transparency and Enforcement Act ("SLATE Act"); (vi) as permitted under applicable law, that the school will provide information requested by Sallie Mae related to the borrower, including without limitation contact information; and (vii) that the information provided in the application is true, complete and correct to the best of my knowledge and belief.

For example, the Enter School Certification page for Bar Study Loans:

Enter school certification

Bar Study Loan [Borrower](#) [Certification](#)

Borrower information [Return to top](#)

Fields marked with an asterisk(*) are required to continue processing. For your convenience, blank fields are shaded in yellow and should be completed unless otherwise noted.

Social Security number: 888-00-1016
 Date of birth: 06/09/1988
 Name: DANIEL MOBERG
 Email address: c59786@salliemae.com

Permanent address

Street address 1: 1311 Blackwalnut Ct
 Street address 2:
 City: Annapolis
 State: MD Zip code: 21403
 Primary phone number: 9944022748 Cell: Home:

Certification information [Return to top](#)

School name: NEW UNIV -MAIN CAMPUS
 School code / branch: 000000-00
 Lender name: Sallie Mae

Enrollment status: *

Anticipated graduation date: * (ex: mm/dd/yyyy)

Submit certification option: View submission results online

As an authorized representative of the school identified above, I hereby certify the following: (i) the borrower is eligible for the loan identified in this enrollment verification request; (ii) the information completed in this school enrollment verification is accurate; (iii) that the school will notify Sallie Mae if the student withdraws from the school; and (iv) as permitted under applicable law, that the school will provide information requested by Sallie Mae related to the borrower, including without limitation contact information.

(Continued on the next page)

2. Populate all necessary fields in the **Certification Information** and **School Disbursement Information** sections for Smart Option Student Loans or in the **Certification Information** section for Bar Study Loans.

NOTE: To pre-populate certain data fields in the certification record using a saved data set, select an initial values set from the **Initial Values Set** drop-down list. Using initial values both saves time and ensures consistent data entry across multiple certifications.

3. Click the **Submit Certification** button.

The Submission Results page displays.

NOTE: This page may be bypassed by de-selecting the **View Submission Results Online** check box on the Enter School Certification page.

4. Review the information displayed on the page and click the **Next** button.

A series of pages display that allow you to view and print the application documents.

5. Follow the instructions on the pages to view and print the documents.

The Final Instructions page displays.

6. Review the instructions displayed on the page and proceed as necessary.