

# How To

## Get the Most from *iPROMise*

Award information on the *iPROMise* site can be updated by using *iPROMise* Customer Access via System 3i to process various transactions. This article will highlight these enhancements. For detailed information regarding each transaction or *iPROMise* Customer Access, please refer to the *iPROMise* documentation located in our Reading Room. Please contact your Customer Service Representative for the Reading Room address.

A **Record Detail Link** has been added to the *iPROMise* Borrower Search–Detail page which indicates the available transactions for a particular award.

### **iPROMise Borrower Search -- Detail**

To view documents for a student, click on the link under the document heading.

If the document does not apply to the student 'N/A' will be under the document heading name. If the document is incomplete the heading will be labeled 'Incomplete'.

To update a document to wet signed copy received, click the 'Y' under the column Wet Signed and then click the 'Update' button below. To update the Received status of the mailed TLID click the 'Y' in the 'Received' column of the TLID heading. Updating the status of an MPN to Wet Signed automatically updates the status of the TLID to Accepted if it exists for the record.

The Record Detail Link will display the update capabilities for each award displayed for the student.

Borrower Name SSN Address	Award Year Total Award Amt Program Number	Loan Interview			MPN Winter Wet Signed	TLID Received	Record Detail Link
		Spring	Summer	Fall			
Demonstration, Training 888-02-0410 123 Easy Street STAMFORD , CT20784	2008 \$1,100.00 00006	\$0.00	Completed	\$1,100.00	\$0.00 ○ Y ● N	Mailed ○ Y ● N	<a href="#">Add/Cancel/Delete</a>

New Search

Print

Previous

Update

The possible transactions displayed for the **Record Detail Link** are:

- Update
- Cancel
- Delete
- Add (short for Add Award)

## Update Transaction

Fields for each award that can be changed using the **Update** transaction are based on the registration status of the borrower and if any sections of *iPROMise* are completed on the borrower site.

### *Unregistered/Incomplete Sections*

If the borrower is not registered and has not completed any sections of *iPROMise*, all fields are updateable with the exception of the fields listed above the Last Name, First Name and Middle Initial fields.

### *Registered/Incomplete Sections*

If the borrower is registered and has not completed any sections of *iPROMise*, Borrower Name, SSN, and DOB fields will be *unavailable* for update in addition to the fields listed above the borrower name field.

### *Registered/Completed Sections*

If the borrower is registered and has completed at least one section of *iPROMise*, the only fields available for update are the Award Amounts.

**NOTE:** Fields listed above the **Last Name, First Name and Middle Initial** fields on this screen *are not* updateable for any record *regardless* of the registration status and completion status of *iPROMise* sections. These fields include:

- Award Year
- MPN Type
- Borrower Type
- Program Number
- Loan Type
- Interest Rate
- Grace Months
- Counseling, Interview, MPN/TLID - Status of the Section of *iPROMise*

The **Update** screen is shown below. Once updates are entered, click the **Update Award** button located at the bottom of the page.

**iPROMise Award Update** ▶ Log Out

Below is the award selected to either update, cancel or delete.

Award Year	MPN Type Borrower Type	Program Number Loan Type	Interest Rate Grace Months	Counseling Interview	MPN/TLID Status
2008	Single year Repeat	00006 Perkins	05000 9	Incomplete Incomplete	Incomplete Incomplete

\*Last Name: DEMONSTRATION \*First Name: TRAINING1 Middle Initial:

\*SSN: 888-02-0411 \*DOB: 07/03/1977

\*Address1: 124 EASY STREET  
Address2:

\*City: MIAMI \*State: KY \*Zip Code: 20904 -0000

Phone Number: (000)000-0000  
E-Mail Address: LKING@CAMPUSPARTNERS.COM

\*Est Separation Date: 06/30/2010 Driver's License No.: 000000000  
Fund Number:  Driver's License State: NC

\*Award Amounts:  Fall  Winter  Spring  Summer

Update Award Cancel Award Delete Award  
Cancel/Previous

\* Field required.

Other fields located on this page include:

- \*Last Name
- \*First Name
- Middle Initial
- \*SSN
- \*DOB
- \*Address1
- Address2
- \*City
- \*State
- \*Zip Code
- Phone Number
- E-mail Address
- \*Est. Separation Date
- Driver's License No.
- Fund Number
- Driver's License State
- \*Award Amounts: Fall, Winter, Spring, and Summer

Required fields are noted by an asterisk\*.

### Cancel Transaction

Any award can be cancelled regardless of the registration status or completed status of *iPROMise* documents by clicking the **Cancel Award** button located at the bottom of the **Update Award** page.

**NOTE:** Documents that have been completed (Loan Interview, MPN, TLID) prior to the cancel transaction will be accessible to the user as links on S3i. The *borrower* site will *not* display links to completed documents, but will label sections as **Cancelled**.

### Delete Transaction

Any award can be deleted regardless of the registration status or completed status of *iPROMise* documents by clicking the **Delete Award** button located at the bottom of the **Update Award** page.

**NOTE:** Awards that have been deleted are no longer accessible on the site as a Borrower Search. A list of deleted records may be produced using the **Processed Award Changes** feature.

### Add Award-TLID Accepted or Mailed

If the TLID is completed (Accepted or Mailed), the 'add award' transaction can be processed to change TLID amounts. The **Record Detail Link** on the **Borrower Search-Detail** page will be displayed as shown below for the 2007 award year for completed TLID's.

124 EASY STREET STAMFORD , CT20784	2007			<a href="#">Completed</a>			<a href="#">Mailed</a>	<a href="#">Mailed</a>	<a href="#">Add/Cancel/Delete</a>
	\$1,111.00	\$0.00	\$0.00	\$0.00	\$1,111.00	<input type="radio"/> Y <input checked="" type="radio"/> N	<input type="radio"/> Y <input checked="" type="radio"/> N		
	00006								
<input type="button" value="New Search"/> <input type="button" value="Print"/> <input type="button" value="Previous"/> <input type="button" value="Update"/>									

To add award amounts, click the **Record Detail Link**. The *iPROMise Update Award* page will be displayed. Fields displayed on this page are the same as for the **Update** transaction, but the only updateable fields are **Award Amounts**.

<b>Est Separation Date:</b>	06/30/2010	<b>Driver's License No.:</b>	000000000
<b>Fund Number:</b>		<b>Driver's License State:</b>	NC
	<b>Fall</b>	<b>Winter</b>	<b>Spring</b>
<b>*Award Amounts:</b>	\$ <input type="text" value="0.00"/>	1,111.00	\$ <input type="text" value="0.00"/>
			<b>Summer</b>
			<input type="text" value="0.00"/>

\* Field required.

## iPromise Customer Access

[▶ Borrower Search](#)
[▶ Reporting](#)
[▶ Award Data Entry](#)
[▶ Processed Award Changes](#)
[▶ Back to System 3i](#)

### iPROMise Processed Award Changes

[▶ Log Out](#)

#### iPROMise Processed Award Changes

**Search Criteria: Select all that apply.**

System Number:

Program Number:

Award Year:

Award Change Type:

Award Change Date Range:  To

**Or**

Cumulative Award Information:

Sort Criteria:

## Processed Award Changes

This list is a quick way to view **Award Changes** for a particular date or a cumulative list can be created. The list can be sorted based on the needs of the user.

A sample **Processed Award Changes List** is shown below.

**iPromise Customer Access**

▶ Borrower Search ▶ Reporting ▶ Award Data Entry ▶ **Processed Award Changes** ▶ Back to System 3i

**iPROMise Processed Award Changes** ▶ Log Out

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**iPROMise Processed Award Changes**

Your search returned the following observations. The Record Detail Link displays update transactions available for each record. Click this link to update award information.

Borrower Name	SSN	System Number	Program Number	Award Year	Completed Section	Registered Date	Last Award Change Type	Last Award Change Date	Record Detail Link
DEMONSTRATION, TRAINING	888-02-0410		00006	2008			Deleted	11/28/2007	
demonstration, training	888-02-0410		00006	2007			Deleted	11/28/2007	
DEMONSTRATION, TRAINING1	888-02-0411		00006	2008		11/27/2007	Deleted	11/28/2007	
DEMONSTRATION, TRAINING1	888-02-0411		00006	2007	TLID	11/27/2007	Deleted	11/28/2007	
DEMONSTRATION, TRAINING2	888-02-0412		00006	2008	Cancelled	11/28/2007	Cancelled	11/28/2007	<a href="#">Delete</a>

This list also contains the **Record Detail Link** with the available transactions that can be processed for an award. By clicking this link, the **iPROMise Update Award page** will be displayed (see Update section above).

This list can also be created in downloadable format using the Reporting feature located under the **Reporting tab**.