



**SANTA ANA COLLEGE**  
**FINANCIAL AID OFFICE**  
 1530 W. 17th St., Santa Ana, CA 92706  
 T: (714) 564-6242 F: (714) 564-6131  
 www.sac.edu

**Office Use Only:**

Reviewed by: \_\_\_\_\_  
 Date: \_\_\_\_\_

**New Borrower**   
**Return Borrower**

## PROCESSING DIRECT LOAN CHECKLIST

Student's Name: \_\_\_\_\_ Student ID: \_\_\_\_\_  
 SSN#: \_\_\_\_\_ DOB: \_\_\_\_\_

Dependency status (according to ISIR):  Dependent  Independent  
 Direct Loan Request form posted in CRI: (If not, add it on CRI) date received: \_\_\_\_\_  
 Published Program (A&R record): \_\_\_\_\_  
 SAP status Fall21 SAP status: \_\_\_\_\_  
 Spring22 SAP status: \_\_\_\_\_

Enrolled units eligible for DL (≥6 units): Fall \_\_\_\_\_  Reg.  PT units Spring \_\_\_\_\_  Reg.  PT units  
 Entrance Counseling Check (in Datatel):  Yes, date completed: \_\_\_\_\_  No. Send IQ dated \_\_\_\_\_  
 MPN Check:  Yes in Datatel,  Yes on MPN Report, Expired Date: \_\_\_\_\_  No MPN, to be rechecked after origination  
 NSLDS Check date \_\_\_\_\_

New borrower

Prior loans: first loan period: \_\_\_\_\_ to \_\_\_\_\_ From School: \_\_\_\_\_  
 last loan period: \_\_\_\_\_ to \_\_\_\_\_ From School: \_\_\_\_\_

Is there an Overlap in the last Loan Period?  No  Yes. Analyst needs to clarify student's FA eligibility

Total outstanding subsidized student loan shows on NSLDS: \$ \_\_\_\_\_  
 Total outstanding unsubsidized student loan shows on NSLDS: \$ \_\_\_\_\_

**To be completed by Analyst:**

Grade level:  Prep coursework  Level 1= 0 to 29.9 completed Units  Level 2= 30+ completed Units  
 Loan period:  AY  Fall 2021 ONLY  Spring 2022 ONLY

Budget (according to the above Loan Period): Budget used: \_\_\_\_\_

EFC:  AY  one semester EFC used: \_\_\_\_\_  
 FA awarded: \_\_\_\_\_

Unmet Cost: \_\_\_\_\_ Unmet Need: \_\_\_\_\_

Estimated Subsidized Loan Amount: \$ \_\_\_\_\_  F1C21DS1, SF600 or \$ \_\_\_\_\_  F1C21DS2, SF600  
 Estimated Unsubsidized Loan Amount: \$ \_\_\_\_\_  Dep, F1C21DU1, SF610 or \$ \_\_\_\_\_  Ind., F1C21DU2, SF610  
 FAD= AW, update CRI, add DL to AIDE and forward this form to Ruby for RAW. Ruby will scan this complete form into ImageNow.  
 FAD is not AW, update CRI, do not add DL to AIDE, give the complete form to Tech, Tech will scan it into ImageNow. DL will be automatically added during packaging.

Denied, reason(s): \_\_\_\_\_  
 Notified student: \_\_phone \_\_email \_\_mail Date Notified: \_\_\_\_\_  
 Other: \_\_\_\_\_

**To be completed by FA staff (print name) \_\_\_\_\_ on (date) \_\_\_\_\_**

150% status for new borrower: Max. Sub. Elig. Period: \_\_\_\_\_ Sum Actual Sub. Usage: \_\_\_\_\_  
 Remaining Actual Sub. Eligibility Period: \_\_\_\_\_ by File PUSH DT: \_\_\_\_\_

Student dropped below 6 units effective date: \_\_\_\_\_  Student separated from SAC effective date: \_\_\_\_\_

Exit Counseling:  Yes, Exit Counseling completed date: \_\_\_\_\_  No. Sent Exit Counseling instructions