

Maintaining References

In addition to tracking borrower demographic information, SAL is also able to house information about references that are provided by a borrower. References can be added and/or modified at any time.

Entering a New Reference

Step 1:	From the Primary Window, click the Name Action Tab.
Step 2:	Click the New Reference button.
Step 3:	Complete the desired fields. If the reference's address is the same as the student's, click the Copy Student button to copy the student's address into the form.
Step 4:	Select a Source from the drop-down in the top right corner of the screen.
Step 5:	Click the Save Changes button.

The screenshot shows a software window titled "Changing Demographic Data" with a menu bar (File, Help) and a toolbar (Save Changes, Undo Changes, Billed Loans, Other Info, New Reference, Copy Student, Help). The form is for a "SPOUSE" reference with the following details:

- Relationship:** SPOUSE (dropdown)
- Send Bill:** Yes (radio), No (radio)
- Last Updated:** 04/03/2013
- Source:** Borrower (dropdown)
- Domestic:** Selected (radio)
- Status:** AG
- Title:** Major
- Student SS#:** 001 72 9948
- First Name:** ANDREW
- Last Name:** LYNCH
- Address:** 125 MAIN STREET
- City:** MONACA
- State:** PA
- Zip:** 15061
- Phone:** (412)555-0004
- Work Phone:** (412)113-0004
- Fax:** (412)112-0004
- DOB:** 15061
- ACH Dup OK:** (checkbox)
- Send E-Billing Statements:** (checkbox)
- ACH Information:** (text area)
- Drivers Information:** (text area)

A message at the bottom of the window states: "Changes Have Not Been Saved."

Modifying a Reference

Step 1:	From the Primary Window, click the Name Action Tab.
Step 2:	Double-click the reference that needs to be updated.
Step 3:	Edit the form as desired.
Step 4:	In the top right corner of the screen, select a Source from the drop-down.
Step 5:	Click the Save Changes button.