Processing a Cancellation

Step 1:	From the Primary Window, click the **Canc** Action Tab.
Step 2:	Click the **Add** button.
Step 3:	A list of available cancellation types for the fund will display in *the Select Type Here* box. Any postponements or cancellations that have been posted in the past will display in the window at the bottom of the screen. Review the information and determine the appropriate cancellation type. Double-click the cancellation type.
Step 4:	A window will pop up requesting additional information about the cancellation, such as the starting and ending date, if the borrower should be notified by letter and email, and if the transaction is a fiscal transaction. Complete the screen appropriately.
Step 5:	Click the **Auto Processing** button. *Note: If the Auto Processing button is not available, click the **Manual Processing** button and verify that the amounts are correct on the Cancellations screen. Click the **Apply** button.*
Step 6:	A SAL system message will display indicating that the cancellation has been processed and a letter created. Click the OK button.
Step 7:	The Automatic Deferment/Cancellation Results window will report the results of the process. If the cancellation was not posted, the reason will be stated on the report.
Step 8:	Click the X in the top right corner of the window to close the Cancellation Results.
Step 9:	Memo the account.

The Cancellation has been posted to the account. Written confirmation of the Cancellation should be sent to the borrower. A standard letter is available in SAL.

Printing a Cancellation Letter

Step 1:	From the Primary Window, click the **Forms** button.
Step 2:	Click the **Letters** button.
Step 3:	Click the **Generate Letters** button.
Step 4:	Click the **Yes** button to create the merge file.
Step 5:	An on-screen prompt will ask if ECSI is sending the letter. Click **Yes** or **No** to proceed. If ECSI is sending the letter, a charge will be incurred.
Step 6:	Verify the print and send selection. Click the **Yes** button to continue.
Step 7:	Double-click the cancellation letter. *Note: The Launch Word button will display "Start FTP" for a terminal server school at their location. The Open Letters Window button is only available at ECSI.*
Step 8:	Click the Start FTP button to initiate the process to send the mail merge to the local computer. After clicking the button, click the icon on the PC that completes the file transfer.
Step 9:	The letter will open in Microsoft Word. To populate the letter with the borrower's information, click the **Mailings** tab. (Steps may vary depending on the version of Microsoft Word used.)
Step 10:	Click the **Finish and Merge** button.
Step 11:	If saving the letter, change the name of the file to prevent overwriting the template.