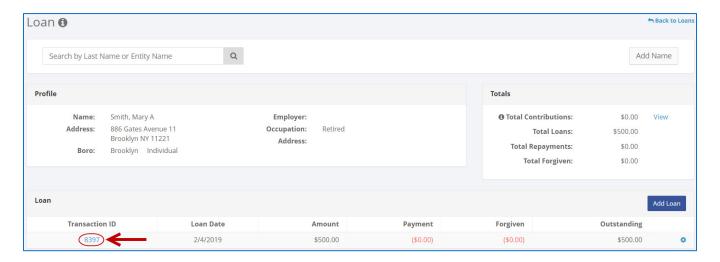# C-SMART HELP

FORGIVEN LOANS
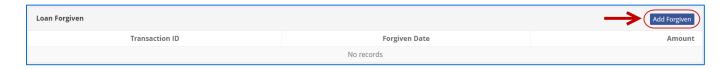
HOW TO ADD A FORGIVEN LOAN

1. Go to the lender's **Loans** page.

   ➢ Click the loan's **Transaction ID** OR enter it into the **Search Name or Transaction ID** bar.

OR

2. Click **Add Forgiven**.

3. Enter and save the forgiven loan's details.

     ➢ C-SMART will alert you if you leave out required information. Complete the fields below:

          ◆ **Forgiven Date:** Enter the date the lender forgave the loan.

          ◆ **Amount:** Enter the amount forgiven.

          ◆ **Notes:** Enter any additional information about this transaction. The CFB cannot review this field. Your notes will be saved across all related transactions.

     ➢ Then, click Save.
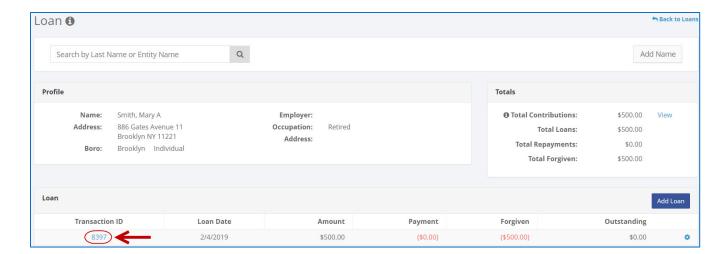

4. The forgiven amount has been successfully saved.

     ➢ Once you hit **Save**, C-SMART will return you to the **Loans** page. The **Totals** box and the list of loans will be updated to reflect the newly saved transaction.

Best Practice: Write the C-SMART **Transaction ID** on any related documentation, including the copy of the loan forgiven letter.

Important: Forgiven loans are considered contributions and count against the lender's contribution limit.

HOW TO EDIT A FORGIVEN LOAN

1. Go to the lender's **Loans** page.

   ➢ Click the loan's **Transaction ID**, scroll down to **Loans Forgiven**, click the **gear** and then **Edit Loan Forgiven**. You can also use the **Search Name or Transaction ID** bar.
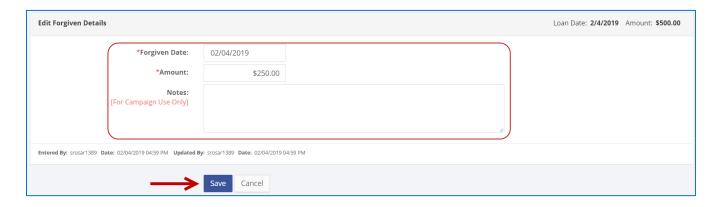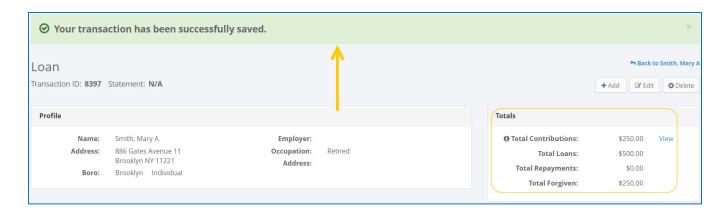

OR

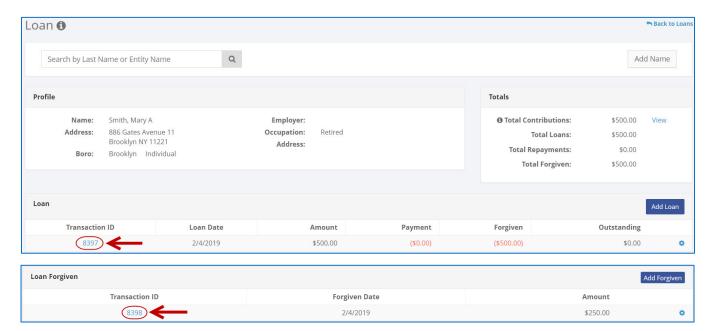2. Modify the necessary fields and click **Save**.

3. The forgiven loan has been successfully edited.

Important: The timestamp at the bottom will be updated to show who last modified the transaction.
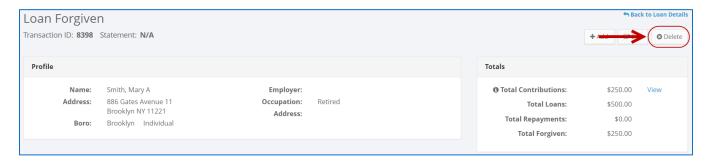
HOW TO DELETE A FORGIVEN LOAN

1. Go to the lender's **Loans** page.

   ➤ Click the loan's **Transaction ID**, scroll down to **Loans Forgiven**, click the **gear** and then **Edit Loan Forgiven**. You can also use the **Search Name or Transaction ID** bar..
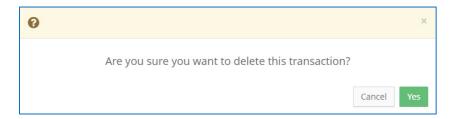

OR

2. Click **Delete** to proceed.

➢   Click **Yes** on the window that opens to complete the deletion.

3. The forgiven amount has been successfully deleted.

Important: You should generally only delete a transaction if it was entered in error.