Technical Resources and Assistance

While nongovernmental organizations and their publications often provide useful information, the guidance they offer provides no defense in the case of audit and program review findings. For authoritative guidance on the Federal Student Aid program requirements, schools should refer first to Department of Education publications, and then to broader U.S. Government publications.

ELECTRONIC ASSISTANCE

FSA Schools Portal: Financial Aid Professionals Website

The Financial Aid Professionals Portal Website (FAP), located at

http://fsa4schools.ed.gov/

provides a single portal from which you can access Federal Student Aid tools, products and services such as –

- links to all Federal Student Aid services for schools,
- a calendar of financial aid events,
- hot topics in Federal Student Aid,
- conferences and training,
- listservs and mailing lists,
- information about ordering publications,
- student data, and
- school participation and funding

Information for Financial Aid Professionals (IFAP)

With the launch of the Financial Aid Professionals Portal Website (FAP), the *Information* for Financial Aid Professionals Website (IFAP) has returned to its original mission as a library of Title IV documents.

http://ifap.ed.gov

The IFAP online library contains links to –

- reference materials,
- technical publications,
- laws and regulations,
- letters and bulletins, and
- policy guidance on the administration of the Federal Student Aid Programs.

> IFAP has recently implemented a RSS feed that gives hourly updates of IFAP's latest publications. Look for the RSS XML button on the IFAP <http://ifap.ed.gov/> home web page along the left side navigational bar.

IFAP Subscription Service

If you wish to be informed of recent changes to laws, regulations, and policy, you can subscribe to weekly updates to the Information for Financial Aid Professionals Website. You can enroll at

http://ifap.ed.gov/IFAPWebApp/logonMemberServicesPag.jsp

Federal Student Aid Media Podcasts

ED has begun providing a limited number of Federal Student Aid presentations in podcast (audio) format. Transcripts of the presentations are provided as well. Some of the presentations are offered in a slideshow format (Microsoft Power Point), and Portable Document Format (PDF). In addition, handouts are available for some of the presentations. You can find a list of available presentations at

http://ifap.ed.gov/presentations/ifapMedia.html

Federal Student Aid Listserv

The Federal Student Aid Listserv (FSATech) is located at

http://www.ed.gov/offices/OSFAP/services/fsatechsubscribe.html

is an e-mail listserv for technical questions about Federal Student Aid systems, software, and mainframe products. For more information about FSATECH, including how to subscribe and post questions, go to **fsa4schools.ed.gov**, click "Listserves/Mailing Lists" on the left menu, and click the "FSATech listserv" link.

FSA Download Center for Software and Manuals

You can download many of Federal Student Aid's most helpful publications and products such as software and related user documentation from the U.S. Department of Education's Federal Student Aid Download (FSAdownload) Web site, located at

http://fsadownload.ed.gov/

The following are some of the materials available through the Download Center that might be useful in the Business Office.

Direct Loan Tools Release 7.0

Direct Loan (DL) Tools for Windows, Release 7.0, is a multi-year Windows-based application designed to provide the following functionality related to all Direct Loan schools' software:

- Compare the School Account Statement (SAS) to loans and actual disbursements recorded in EDExpress or an external file, and/or compare the SAS to the DL Tools Cash database.

- Print the SAS in a readable format.

- Track Cash Receipts (drawdowns) and Refunds of Cash for Direct Loans.

- Rebuild your Direct Loan origination and disbursement records in EDExpress using an automated process.

DL Tools processes data for multiple program years. Release 7.0 contains SAS Compare and formatting, Cash Management, and Rebuild functionality for the 2005-2006, 2006-2007, and 2007-2008 cycles. All Direct Loan schools can use the Compare and Cash Management functionality. The Rebuild function is used by schools to rebuild accepted Direct Loan records in EDExpress for Windows databases. However, non-EDExpress users can export data from a rebuilt EDExpress database to recreate non-EDExpress loans or databases.

Federal Perkins DataPrep, Version 3.1

National Student Loan Data System (NSLDS) Federal Perkins DataPrep (Perkins DataPrep), Version 3.1, is software designed to work on Windows 2000 and Windows XP Professional operating systems. It assists schools and third party servicers in reporting Federal Perkins loans to NSLDS. (Schools participating in the Federal Perkins Loan Program are required to report detailed loan information to NSLDS on a monthly basis.)

Perkins DataPrep allows a data provider to:

- Validate Extract Files – Perkins DataPrep examines their Database Extract file verifying that its format is acceptable.

- Edit Extract Files – Perkins DataPrep checks the Extract file for errors. If the number of errors is within the prescribed limits, Perkins DataPrep creates a new file called the Submittal file.

- Create Submittal Files – the Submittal file contains Perkins loans created from the extract file and is transmitted to NSLDS.

- Generate Error Reports – Perkins DataPrep analyzes errors received by NSLDS. The two load-processing error reports, Summary and Detail, list the errors identified.

Perkins TEF File

The Perkins Threshold, Error Code, and Field Code (TEF) file, contains the software parameters for Load Error processing, error field names, and messages for processing of the Load Error file for schools or servicers that submit Perkins Loan data. This file was previously transmitted quarterly to a school's SAIG mailbox and contained any updates since the last file was sent. Schools and/or servicers must ensure that they "refresh" the TEF file on a quarterly basis.

School Electronic Process Guide

The School Electronic Process Guide describes cyclical updates and enhancements to the following products:

- FAA Access to CPS Online,

- Return of Title IV Funds (R2T4) on the Web,

- ISIR Analysis Tool,

- EDE Suite PC Products

    - EDExpress (Global Packaging Application Processing, Pell, ACG, National SMART Grant, and Direct Loan;
    - Direct Loan (DL) Tools for Windows, and
    - Student Status Confirmation Report (SSCR) for Windows.

EDconnect

EDconnect is a Windows-based software that assists users with sending, receiving, and managing their Federal student aid information electronically. Users collect data on their personal computer (PC) or computer system and transmit the collected data in batches over the Student Aid Internet Gateway (SAIG). The appropriate Title IV Application System receives the data, processes the data, performs any required database cross-referencing, and returns the processed data to the user's SAIG mailbox. The entire processing cycle for routine application data within the SAIG system is typically 72 hours (three working days).

EDExpress for Windows 2007-2008

The EDExpress software is a free PC application that assists institutions with processing, packaging, and managing Title IV student financial aid records. Functionality to process applications, federal student aid grants (Pell, ACG, and National SMART Grants), and Direct Loans is included.

COD Technical Reference

The Common Origination and Disbursement (COD) Technical Reference provides technical specifications and record layouts for transmitting ACG, National SMART Grant, Pell Grant and Direct Loan data to the COD System.

SSCR (Enrollment Reporting)

Student Status Confirmation Report (SSCR) for Windows, is a non year specific software application designed to help schools satisfy enrollment requirements and update student address information with the National Student Loan Database System (NSLDS).

ISIR Analysis Tool

The ISIR Analysis Tool is a Web-based application that analyzes FAFSA data reported on the ISIR. A school uses the information to fine tune its own institutional verification procedures. The ISIR Analysis Tool compares initial and paid-on ISIR transactions to determine if changes in student reported information had an impact on EFC and Pell eligibility. Users import initial and paid-on records from the ISIR Datamart into a database in the ISIR Analysis Tool. Users can construct queries, develop custom formats and field increments to obtain data from the tool that can help identify problematic areas, zeroing in on specific EFC ranges, data elements, and populations. This data can help a school customize its verification procedures and consumer information provided to students and parents. In addition the data can identify sections of the FAFSA that may be most confusing to applicants and their families. Such information can help Federal Student Aid in the development of future FAFSAs as well as improve verification selection criteria through the Central Processing System.

The ISIR Analysis Tool provides a full complement of report and analytical capabilities utilizing state-of-the-art Web technology. The reports generated and information obtained from the ISIR records can help a school answer the following questions -

- For what group of students (if any) are the CPS edits missing on your campus?

- For what group of students (if any) are discretionary verification procedures missing?

- How can a school effectively develop discretionary verification edits to focus on students making changes that affect EFC and Pell eligibility?

The ISIR Analysis Tool can answer these questions and help a school develop discretionary verification criteria that fit its particular population, and ensure that the right students are receiving the right awards.

To use the ISIR Analysis Tool, your school must enroll in FAA Access to CPS Online. For more information, please refer to

http://www.fsawebenroll.ed.gov

For additional guidance about using the ISIR Analysis Tool, a school should use the resources available at

http://ifap.ed.gov/qahome/guidance.html

CENTERS FOR SERVICE

The new Website for Financial Aid Professionals, located at

http://fsa4schools.ed.gov

and described on page 1 contains links FSA's help desks. Since the information on the Website is updated frequently you can find the most current contact information by using that resource. (On the aforementioned Website on the left hand side under *Resources and Training* you'll find an entry for **Contacts.)**

For your convenience, this document provides links to the most commonly used resources.

If you are not sure which Service Center to call please contact the Research and Customer Care Center at

1-800-433-7327, or email us at **fsa.customer.support@ed.gov**.

Common Origination and Disbursement (COD) School Relations Center

For questions related to general Common Origination and Disbursement (COD), ACG, National SMART Grant, Pell Grant, and Direct Loan processing.

http://fsa4schools.ed.gov/help/cod.htm

Direct Loan School Servicing Center (helps with servicing rather than COD issues)

For clarification or interpretation of policies and regulations.

http://fsa4schools.ed.gov/help/directloan.htm

Campus-Based Programs

For questions related to Perkins default rates, FISAP information, and Campus-Based Programs.

https://cbfisap.ed.gov/ecb/CBSWebApp/

Training and Conferences

Questions or feedback related to the FSA conferences can be directed to the Conferences Service Center.

http://fsa4schools.ed.gov/help/conferences.htm

CPS/SAIG Technical Support

Hours are 7 a.m. – 7 p.m. (ET) Monday through Friday

If you have any questions regarding Federal Student Aid software or Web products, contact CPS/SAIG Technical Support.

Information Center   800/330-5947
Email   CPSSAIG@ed.gov.
TDD/TTY   800-511-5806.

http://fsa4schools.ed.gov/help/cpswantech.htm

Borrower Services - Collections (ED Collections)

Hours are 8 a.m.–10:00 p.m. (ET), Monday through Saturday

Information Center   800-621-3115
TDD/TTY   800-730-8913
Email   dcshelp@vangent.com

Federal Student Aid Ombudsman (helps resolve student loan concerns when other approaches fail)

The Ombudsman Office is a final resource after individuals look for help through other customer service avenues.

http://fsa4schools.ed.gov/help/ombudsman.htm

Default Prevention and Management

Default Prevention and Management calculates and disseminates school cohort default rates, processes appeals/adjustments/challenges to the default rate data, and works with schools/agencies on default prevention tools and techniques. Guaranty agency and lender cohort default rates are available from Financial Partners, Partner Services, at (202) 377-3053. Students with federally insured defaulted student loans may find beneficial information in the Department's Guide to Defaulted Student Loans.

http://ifap.ed.gov/DefaultManagement/DefaultManagement.html

Research and Customer Care Center

Hours: are 9 a.m. to 5 p.m. (ET) Monday through Friday

The Federal Student Aid Research and Customer Care Center (RCCC) serves as your advocate within FSA's Applications, Operations and Delivery Services and ensures that your concerns are addressed within Federal Student Aid. RCCC is made up of Department of Education, Federal Student Aid employees, located in Washington, DC, and welcomes inquiries from financial aid professionals about the Federal Financial Aid Programs.

Phone: 1-800-433-7327   Fax: 202-275-5532

E-mail: fsa.customer.support@ed.gov

Grant Administration and Payment System (GAPS)

GAPS, ED's state-of-the-art electronic system for grants management and payments, is the site through which you can – drawdown federal funds, return federal funds, and manage federal funds; request and complete data summaries; and prepare and submit reports. GAPS is
located at

http://fsa4schools.ed.gov/help/epayments.htm

National Student Loan Data System (NSLDS)

http://fsa4schools.ed.gov/help/NSLDS.htm

Contact the National Student Loan Data System Customer Service Center for assistance regarding the NSLDS system on-line functions to include:

- Cohort Default Rates

- Data Provider Schedules
- Enrollment Reporting Schedules
- Financial Aid History
- Loan History/Detail
- Online Enrollment Reporting
- Organizational Contacts
- Organizational Search
- Overpayments
- Reported Enrollment History
- Transfer Student Monitoring

eZ Audit

EZ Audit provides schools with a paperless single point of submission for financial statements and compliance audits through the web.

http://fsa4schools.ed.gov/help/ezaudit.htm

PEPS Help Desk

Hours are 7:30 a.m.-7:00 p.m. (ET), Monday through Friday

Phone   1-877-366-3338

http://www.ed.gov/offices/OSFAP/PEPS/index.html

Call the PEPS Help desk for connectivity interruptions or other PEPS application problems.

The FSA Self-Assessments

http://www.ifap.ed.gov/qahome/fsaassessment.html

The FSA Assessments are intended to help all schools examine and improve operations. The assessments can help you -

- anticipate and address problems;
- spot-check the systems you are using to manage information;
- prepare for your audit or other review;
- maximize the efficiency of your staff in handling their duties; and
- revise your approaches according to your campus needs - and do so continually.

To enhance their effectiveness, the FSA Assessments include activities to test compliance and procedures. They also are linked to

the latest regulations, Federal Student Aid Handbooks, Blue Book, Dear Colleague Letters, Federal Registers, and other related documents. There is also a link within each assessment to a Policies and Procedures template allowing schools to develop or enhance their policies and procedures.

Schools can also submit Effective Practices or view Effective Practices submitted by other schools. The FSA Assessments currently available are -

1. Student Eligibility,

2. Satisfactory Academic Progress,

3. FSA Verification,

4. Institutional Eligibility,

5. Default Prevention & Management,

6. Consumer Information,

7. Automation,

8. Fiscal Management,

9. Return of Title IV Funds,

10. Federal Work-Study,

11. FSEOG,

12. Perkins Awarding and Disbursement,

13. Perkins Due Diligence,

14. Perkins Repayment,

15. Perkins Forbearance and Deferment, and

16. Perkins Cancellation

For a more detailed explanation of how the FSA Assessments can help your school improve its administration of the FSA programs, please see Appendix F.

Training in the basics of Federal Student Aid Program administration

Annually, the Department provides training for those who administer the Federal Student Aid programs. You can learn about training offered by the Department at

http://www.ed.gov/offices/OSFAP/training/index.html

In addition, ED offers online training in a program called *FSA Coach* (Coach). Coach offers modules on –

1. an introduction to Federal Student Aid,

2. the Federal Student Aid ecosystem,

3. student/family responsibilities,

4. a school's communication responsibilities,

5. a school's responsibilities when awarding aid,

6. a school's fiscal and record management responsibilities,

7. determining a student's eligibility for Federal Student Aid Funds,

8. a school's responsibilities vis-à-vis enrolled and former students, and

9. evaluation of Federal Student Aid program management.

You can find FSA Coach on the Web at

http://www.ed.gov/offices/OSFAP/fsacoach/index.html

Quality Assurance Program

The Quality Assurance (QA) Program helps schools attain, sustain, and advance exceptional student aid delivery and service excellence. You can find information about the QA Program at

http://www.ifap.ed.gov/qahome/Default.html

School Participation Teams

Contact your School Participation team for information and guidance on audit resolution, financial analysis, program reviews, technical assistance, and school and program eligibility/recertification and closed schools.

http://fsa4schools.ed.gov/help/schoolparticipation.htm

The Website for School and Program Eligibility and Recertification is:

http://www.eligcert.ed.gov

Foreign schools can get help by calling: **202-377-3168**

Disability Discharge Loan Servicing Center

The Disability Discharge Loan Servicing Center reviews applications for conditional disability discharge. For information about a student's eligibility or status vis-a-vis loan eligibility, visit the Disability Discharge Loan Servicing Center site at

http://fsa4schools.ed.gov/help/permanentdisabilityassignments.htm