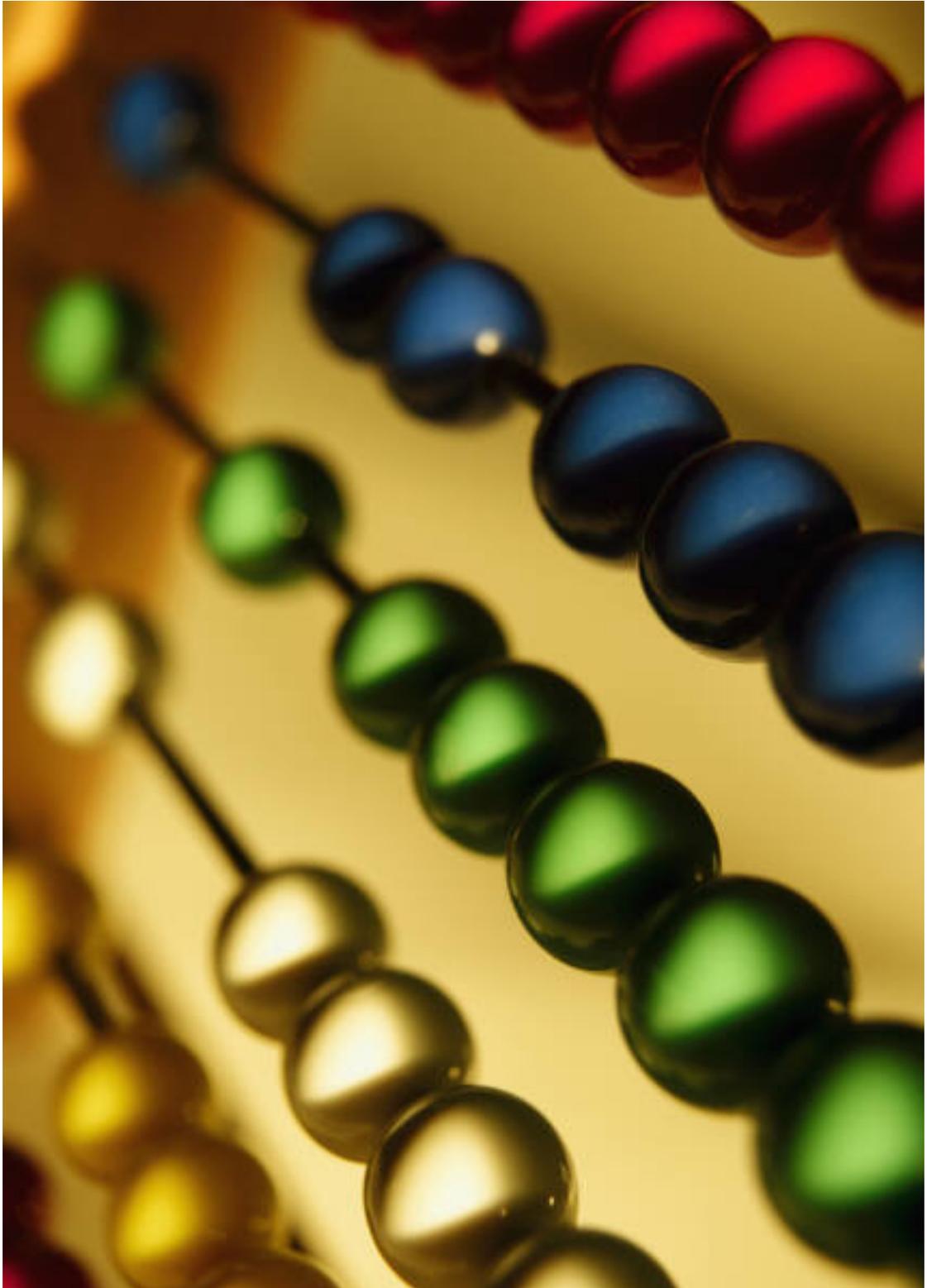


Bi-Weekly Report as of May 14, 2004



FSA Performance Plan – FY2004

SUMMARY

GREEN LIGHT

- The CSB independent verification and validation contract has been awarded. One of the first deliverables under the contract will be to develop a project plan that will detail the processes that will be reviewed through the end of FY 2004. (*Project 13 – Enhance Program Oversight and Monitoring: Borrower Services*). CSB is being rebaselined to reflect the contractor's request to delay implementation. (*Project 53 – Prepare and continually monitor and report on the accomplishments of the High Risk Plan*).
- Consolidation overpayment and underpayment reductions were achieved for the month of April. This is an upgrade from Yellow for the last reporting period. Consolidation staff will work to maintain the 20% reduction in overpayments and the 10% reduction in underpayments each month. (*Project 15 – Implement a plan to improve contractor oversight and performance related to DL Consolidation overpayments and underpayments*).

YELLOW LIGHT

- Additional support staff has been added to more quickly reduce the backlog in submitted audits. Once the peak processing period is over in June, it is anticipated that this project will obtain a green status. Until then, this project continues to be reported as Yellow. (*Project 8 – Expand eZAudit initiative*)
- Although the new training contract has not yet been awarded, (target completion date was April) it is expected to be awarded this month. No training will be negatively affected by this delay. (*Project 11 – Develop and deliver program and technical training for schools*).
- While internal controls are in place, it has been difficult to establish a baseline to assess success measures because FSA specific data is not easily severable from Department data. FSA has eliminated four large sole source contracts to date and anticipates only one extension. This is an improvement over last year's three extensions. The existing reporting methodologies are currently being evaluated and techniques are being developed for acquiring the required data. (*Project 48 – Continuously update and monitor procurement and internal controls*).

RED LIGHT

- For the last five reporting cycles, Project 51 (*Evaluate and implement selected project management standards based on the system development methodology*) has been designated either Red or Yellow. This is because the Solution Life Cycle (SLC) project remains on hold pending the outcome of One ED's SLC project. This project is reported at eight percent (8%) complete.

ACTION PLAN STATUS AT A GLANCE

as of May 14, 2004

FSA No.	Indicator	Status
1	IMPLEMENT STUDENT AID AWARENESS INITIATIVES	
1.1	Leverage partnership activities to disseminate FSA information	
1.2	Publish accurate and timely information that meets the needs of our audience	
1.3	Disseminate information directly to target audience	
1.4	Respond accurately and timely to requests	
1.5	Reach customers through Student Aid on the Web	
2	IMPROVE CUSTOMER INTERACTIONS/CUSTOMER SERVICE CALL CENTER	
2.1	Monitor customer feedback to improve services	
3	CONDUCT APPLICATION PROCESSING (CPS, FOTW, PIN Site, IADD, PM)	
3.1	Implement application	
4	PROVIDE EDEXpress APPLICATION MODULES	
4.1	Release application module	
4.2	Release Common Origination and Disbursement module	
5	PROCESS PELL & DIRECT LOAN TRANSACTIONS THROUGH COD	
5.1	Issue COD software release	
5.2	Issue COD SOO	
6	ADMINISTER CAMPUS-BASED (eCB) ACTIVITIES	
6.1	Prepare list of schools that do not submit FISAP; call schools to ensure compliance prior to tentative award notification	
6.2	Notify schools of tentative awards	
6.3	Call remaining schools that have not submitted FISAPs or that need to correct FISAPs prior to required closure of database	
6.4	Issue final awards to schools	
6.5	Issue FISAP software release	
7	UPGRADE POSTSECONDARY EDUCATION PARTICIPATION SYSTEM (PEPS)	
7.1	Complete Oracle 9i Upgrade	
7.2	Upgrade Windows NT server that houses the E-App	
8	EXPAND eZAUDIT INITIATIVE	
8.1	Commence contract start-up	
8.2	Complete first full cycle of processing (all school types)	
8.3	Improve audit review component of compliance activities by increasing the e-submission rate to 95%	
9	ENHANCE PROGRAM MONITORING AND OVERSIGHT (APP & DEL SERV)	
9.1	Meet or exceed audit resolution rate of 95% by the end of the fiscal year	
9.2	Continue to measure school monitoring to assess overall compliance trends	
9.3	Conduct School Relations initiatives	
9.4	Conduct Experimental Sites initiative	
9.5	Administer the Quality Assurance program	
9.6	Conduct vulnerability assessment	
10	PRODUCE SCHOOL PUBLICATIONS AND MATERIALS	
10.1	Annually update and disseminate the Federal Student Aid Handbook	
10.2	Update and disseminate Direct Loan Program publications	
11	DEVELOP & DELIVER PROGRAM AND TECHNICAL TRAINING FOR SCHOOLS	
12	TRANSITION TO COMMON SERVICES FOR BORROWERS (CSB)	
13	ENHANCE PROGRAM MONITORING AND OVERSIGHT (BORROWER SERVICES)	
13.1	Default Recovery Rate on FSA-held portfolio 9.5% or more	
13.2	Update FSA-wide risk management and default prevention inventory.	
13.3	Complete the work on the implementation of the life-time default rate measure.	
13.4	Identify and enhance current delinquency/default prevention tools for the DLProgram	
13.5	Conduct vulnerability assessment	

ACTION PLAN STATUS AT A GLANCE

as of May 14, 2004

FSA No.	Indicator	Status
14	IMPLEMENT HIGH QUALITY CUSTOMER SERVICE TO THE DL PORTFOLIO	
15	IMPLEMENT PLAN TO IMPROVE CONTRACTOR OVERSIGHT TO DL CONSOLIDATION OVERPAYMENTS/UNDERPAYMENTS	
16	PERFORM NSLDS MAINTENANCE/OPERATIONS ACTIVITIES	
16.1	Perform cohort default rate calculations, send, and post	
16.2	Prepare/send GA fee calculations. Review Forms 2000 reasonability data	
16.3	Review, evaluate, prepare GA NSLDS data integrity improvements reports	
16.4	Make enhancements to Loan Processing and Issuance Fee (LPIF) process for rate changes	
16.5	Participate in the formulation of school cohort default rate initiatives	
16.6	Provide monitoring functionality of GA and Lender reasonability on a monthly basis	
16.7	Upgrade Data Prep Software to be compliant with Windows 2000 and XP	
16.8	Implement Education Credit Management Corporation (ECMC) file format changes	
17	RE-COMPETE CONTRACT FOR NSLDS MAINTENANCE/OPERATIONS	
17.1	Award new contract	
17.2	Monitor and manage transition to new contractor	
18	RE-COMPETE CONTRACT FOR FP DATA MART MAINTENANCE/OPERATIONS	
18.1	Award new contract	
18.2	Monitor and manage transition to new contractor	
19	PERFORM MAINTENANCE/OPERATIONS ACTIVITIES FOR THE FP DATA MART	
19.1	Quarterly status report on ways to improve effectiveness/efficiency of Data Mart review process	
19.2	Quarterly evaluation of use and value added to the guaranty agency and lender review processes	
19.3	Monitor Data Mart feeds to provide accurate, concise and timely data to users	
20	PERFORM FINANCIAL PARTNERS PORTAL OPERATIONS ACTIVITIES	
20.1	Monitor and evaluate web page hits to drive future postings to portal	
20.2	Maintain current and relevant information to financial partners' user community	
20.3	Obtain/evaluate feedback from financial partners' user community on value of information posted on the Financial Partners Portal	
21	PERFORM LEAP/SLEAP ACTIVITIES	
21.1	Review, evaluate, reconcile, and prepare performance reports	
21.2	Prepare and submit clearance paperwork	
21.3	Review/approve applications from states. Obligate, generate, and mail grant award notifications	
22	PERFORM VOLUNTARY FLEXIBLE AGREEMENT (VFA) ACTIVITIES	
22.1	Perform cost neutrality analysis and provide results	
22.2	Prepare performance measure assessment and benchmarking reports	
22.3	Evaluate new applications for VFA	
22.4	Foster effective working relations with guaranty agencies during scheduled site visits	
23	PERFORM MAINTENANCE/IMPROVEMENTS TO THE FP ELECTRONIC RECORDS MANAGEMENT (ERM) SYSTEM	
23.1	As appropriate, integrate ERM work with other FSA business units	
23.2	Analyze and evaluate the current use of the ERM system to identify improvements	
24	PROMOTE EFFECTIVE/EFFICIENT COMMUNICATIONS INTERNALLY & EXTERNALLY	cancelled
24.1	Coordinate and enhance communications within Financial Partners and externally	cancelled
24.2	Hold quarterly checkpoints for all areas of FP service concerning communications	cancelled
25	ENHANCE PROGRAM MONITORING & OVERSIGHT (FP)	
25.1	Participate and provide Financial Partners Channel support for ED audit	
25.2	Prepare and conduct program reviews of guaranty agency and lenders/servicers	

ACTION PLAN STATUS AT A GLANCE

as of May 14, 2004

FSA No.	Indicator	Status
25.3	Analyze and collect third-party audit findings	
25.4	Utilize GA/lender scorecards to reduce risk and improve review process	
25.5	Partner with guaranty agency community on the Common Review Initiative (CRI)	
25.6	Conduct vulnerability assessment	
26	SUSTAIN CLEAN AUDIT OPINION, ADDRESS MATERIAL WEAKNESSES AND REPORTABLE CONDITIONS IDENTIFIED IN ANNUAL FINANCIAL STATEMENT AUDITS	
27	PERFORM INTERNAL CONTROL REVIEWS TO ENHANCE FINANCIAL MGMT	
28	FINALIZE FY 2002 & FY 2003 COST ACCOUNTING MODEL AND DEVELOP BASELINE FY 2002 UNIT COSTS	
29	SUSTAIN/IMPROVE TIMELY RECONCILIATIONS & IMPLEMENT OTHER PROCEDURES TO COMPLY WITH FY 2004 ACCELERATED REPORTING REQUIREMENTS	
30	MANAGE FMS OPERATIONS	
31	DEVELOP & DEPLOY ENTERPRISE PERFORMANCE TEST ARCHITECTURE	
32	PROVIDE ENTERPRISE & DATA ARCHITECTURE MANAGEMENT	
33	PROVIDE SECURITY & PRIVACY SUPPORT TO FSA BUSINESS UNITS	
34	PROVIDE INTEGRATED TECHNICAL ARCHITECTURE (ITA) & ENTERPRISE APPLICATION INTEGRATION (EAI) MAINTENANCE AND PRODUCTION SUPPORT	
35	SUPPORT THE FSA IT ASSETS AT THE VDC WITH LINES OF SERVICE	
36	CONTINUE ENTERPRISE QUALITY ASSURANCE PROGRAM TO SUPPORT THE FSA CIO IN CONDUCTING SYSTEMS ASSESSMENTS/EVALUATIONS	
37	SUPPORT ED, CUSTOMERS AND BUSINESS PARTNERS BY PARTICIPATING IN THE PRESIDENT'S MANAGEMENT AGENDA E-GOVERNMENT INITIATIVES	
37.1	Release GovLoans Gateway	
38	PROVIDE HIGH QUALITY INFORMATION, RESEARCH AND INFORMAL PROBLEM RESOLUTION SERVICES TO STUDENT LOAN BORROWERS AND OTHER PARTICIPANTS IN STUDENT AID PROGRAMS	
39	CONDUCT REAUTHORIZATION ACTIVITIES	
40	POLICY LIAISON PLACEHOLDER	
41	PLAN AND MANAGE FSA CONFERENCES	
42	MANAGE, DEVELOP AND UPDATE CONTENT FOR FSANet	
43	MANAGE CONTROLLED CORRESPONDENCE FUNCTIONS	
44	DEVELOP & IMPLEMENT INTERNAL/EXTERNAL COMMUNICATIONS STRATEGY	
45	MATURE ENTERPRISE-WIDE PROCUREMENT PLAN	
45.1	Complete market research to resolve plan issues	
45.2	Synch Plan w/BIG End State Vision	
46	DEVELOP ACQUISITION WORKFORCE	
47	IMPLEMENT ENTERPRISE CONTRACT PERFORMANCE MONITORING MEASURES AGAINST NEW SYSTEMS CONTRACT AWARDS	
47.1	Incorporate CSB into enterprise process	
47.2	Incorporate Front-End Business Integration Systems (FEBI) into enterprise process	
48	CONTINUOUSLY UPDATE AND MONITOR PROCUREMENT INTERNAL CONTROLS	
48.1	Establish monitoring and reporting process for government furnished property	
48.2	Establish reporting process to monitor vendor performance	
49	INCREASE CONTRACT DOLLARS AWARDED TO SMALL BUSINESSES	
49.1	Increase dollars awarded directly to small businesses	cancelled
49.2	Increase dollars awarded through large business primes to small business subs	cancelled
50	CONTINUE TO IMPLEMENT INTEGRATED PROJECT MANAGEMENT OVERSIGHT FOR FSA'S SYSTEM INTEGRATION ACTIVITIES	
51	EVALUATE & IMPLEMENT SELECTED PROJECT MANAGEMENT STANDARDS BASED ON THE SOLUTION LIFE CYCLE	

ACTION PLAN STATUS AT A GLANCE

as of May 14, 2004

FSA No.	Indicator	Status
52	RESTRUCTURE INTEGRATION LEADERSHIP SUPPORT TO TRANSITION TO FSA STAFF	
53	PREPARE & CONTINUALLY MONITOR/REPORT ON THE ACCOMPLISHMENTS OF THE HIGH RISK PLAN	
54	DELIVER WORKFORCE DEVELOPMENT AND SUPPORT PROGRAMS	
54.1	Continue Intern Program	
54.2	Conduct FSA Orientation	
54.3	Implement results of One-ED Competitions	
54.4	Update Skills Catalog/Learning Tracks	
54.5	Implement Workforce Alignment Strategy	
54.6	Update FSA Human Capital Plan	
55	PERFORM FACILITIES MANAGEMENT ACTIVITIES	
55.1	Implement facilities needs	
55.2	Coordinate security needs	
55.3	Administer records management	
55.4	Coordinate the distribution of the Transit-Benefit program	
56	REVIEW CREDIT REFORM ESTIMATES	
57	DEVELOP TRIAL BALANCE CAPABILITY FOR COD AND CSB	
58	SUPPORT THE IMPLEMENTATION OF ORACLE FEDERAL FINANCIALS RELEASE 11i	
59	IMPLEMENT AUTOMATED BUDGET FUNDING ENTRY SOLUTION	
60	IMPLEMENT FORMS 2000 ADDITIONAL ENHANCEMENTS	
61	IMPLEMENT ENTERPRISE DATA STRATEGY INITIATIVES	
61.1	Map current state and future state business flows of data	
61.2	Develop requirements and initial design for common identifiers for schools and students	
61.3	Develop an integrated data warehouse and Data Mart strategy	
61.4	Develop technical standards, conventions and data management guidelines	
61.5	Determine current data quality and establish a target state plan and quality assurance process	
61.6	Develop an enterprise-wide extensible markup language (XML) technical architecture framework to enhance data sharing and standardization with our external customers	
61.7	Continue to build on Phase I by developing a detailed vision on FFEL/enrollment data flow, gaps/impact of Common Services for Borrowers (CSB), electronic Case Management Oversight (eCMO), NSLDS and electronic Campus-based systems	
61.8	Conduct market research to validate the feasibility of the target conceptual design	
61.9	Develop the detail Data Quality Execution Plan	
61.10	Develop a holistic XML Management Plan	
61.11	Implement SSIM as a pilot on renewal applicants	
62	BEGIN THE IMPLEMENTATION OF COMMON SERVICES FOR BORROWERS (CSB)	
62.1	Award Contract	
62.2	Begin implementing Phase I of the FSA-approved transition plan	
63	IMPROVE SCHOOL PARTNER OVERSIGHT	
63.1	Implement Integrated Partner Management (IPM) system	
63.2	Develop Consolidated requirements for IPM system	
63.3	Develop enrollment high-level design	
63.4	Develop access high-level	
63.5	Develop Routing ID (RID) high-level design	
63.6	Select competitively a vendor to perform the conceptual design and development of the IPM system	
63.7	Begin requirements gathering for eCMO	
63.8	Procure the design of a workflow tool for SEC	
64	IMPROVE THE ACCURACY OF APPLICANT DATA	

FSA Project Status Report

FSA No	Area	Action Item	Status_Date	Comments	%Complete	Status
1	ADS	Implement student aid awareness initiatives.	5/14/2004	Progress continues in each of the Milestones. Two of the milestones associated with this project (1.1 and 1.5) have been successfully completed. The remaining three (1.2, 1.3 and 1.4) are on schedule for completion prior to 9/30/04.	45%	Green
			4/30/2004	Progress continues in each of the Milestones. Two of the milestones associated with this project (1.1 and 1.5) have been successfully completed. The remaining three (1.2, 1.3 and 1.4) are on schedule for completion prior to 9/30/04.	40%	Green
2	ADS	Improve customer interaction through customer feedback particularly at the Customer Service Call Center (CSCC).	5/14/2004	Progress continues in all three areas identified for improvement. In particular, IFAP subscription service membership as of the end of April 2004 had increased by 4% since the previous month for a total 18.5 % increase since the beginning of FY 04.	62%	Green
			4/30/2004	Continued progress in the three areas identified for improvement as documented in milestones.	58%	Green
5	ADS	Process Pell and Direct Loan transactions through the Common Origination & Disbursement (COD) system.	5/14/2004	Progress continues on remaining milestone 5.2. FEBI Phase 1 downselect decision was made on 5/6/2004, and draft FEBI Phase 2 RFP was released on 5/12/2004.	83%	Green
			4/30/2004	Remaining milestone 5.2 on track. FEBI Phase 1 downselect decision to be made by 5/6/2004.	78%	Green
6	ADS	Administer Campus-Based (eCB) activities.	5/14/2004	Progress continues to be made on remaining milestone 6.5. FISAP software testing is scheduled for first and second weeks in June 2004 with release to schools week of 6/21/2004.	83%	Green
			4/30/2004	Remaining milestone 6.5 continues on track. FISAP software to be released week of 6/21/2004.	78%	Green
8	ADS	Expand eZAudit initiative.	5/14/2004	Refresher training was held May 11. We have added more QC resources, to reduce backlog faster to prepare for May workload. In addition, we have identified some redundant steps in the QC process, which will be eliminated within the next 2 weeks.	72%	Yellow
				Registration process is on track. After the peak workload is rec'd, and the resources added to the project are determined to be able to handle the workload, this project should go to green.		
			4/30/2004	Enhancements are on track for May 23 implementation. We have identified the need for more QC resources, to reduce backlog faster to prepare for May workload. Registration process is on track.	70%	Yellow

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>		<i>%Complete</i>	<i>Status</i>
		<i>Status_Date</i>	<i>Comments</i>		
9	ADS		<i>Enhance program monitoring and oversight.</i>		
		5/14/2004	<p>9.1 For the biweekly period 4-26-04 to 5-09-04, 95% of the audits were resolved on time. Cumulative since 10-01-03, 95% of the audits were resolved on time. We are continuing to monitor this closely, as we are expecting a large volume of audits in May.</p> <p>9.2 Training was conducted 5-13-04 for one of our special projects: to call/email approximately 2,000 main campuses and additional locations that do not yet have the required NSLDS transfer student monitoring profiles. Trainers will then train their Team mates and the project will be underway.</p> <p>9.3 The White House Initiative on HBCU's annual report is on schedule to be completed.</p> <p>9.4 Work Continues as scheduled. No significant Developments</p> <p>9.5 Work Continues as scheduled. No significant developments.</p> <p>9.6 Project leader is being briefed on work that teams will complete.</p>	58%	Green
		5/3/2004	<p>9.1: For the biweekly period 4-12-04 to 4-25-04, 95% of the audits were resolved on time. Cumulative since 10-01-03, 95% of the audits were resolved on time. We are continuing to monitor this closely, as we are expecting a large volume of audits in May.</p> <p>9.2: For the first 2 qrts of FY 04, SEC conducted a comprehensive review of 1,641 unduplicated schools, or 27% of the total population, covering 28% of Title IV funding. 92 schools received an on-site program review and 50 schools received an on-site technical assistance visit.</p> <p>9.3: 139 out of the 165 perkins schools with excess liquid cash have had reconciliation.</p> <p>9.4: Performance Analysis (PR) data is being worked on currently.</p> <p>9.5: Phase 1 of the ISIR tool development remains on track.</p> <p>9.6: Continue to be prepared for May 2004 kick off for vulnerability assessment studies.</p>	56%	Green
10	ADS		<i>Produce school publications and materials.</i>		

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>	<i>Status</i>
<i>Status_Date</i>	<i>Comments</i>	<i>%Complete</i>	<i>Status</i>
5/14/2004	<p>10.1 There were no significant developments on this project during this period. This portion remains yellow because of delays with policy staff comments from OPE.</p> <p>10.2 The Entrance Counseling Guides are in stock and orders are being filled appropriately. The Basics brochures are still in development with work progressing as planned. There are 28 back-ordered requests at the warehouse. All of these are for the Direct Loan PLUS Basics brochure that is currently being revised.</p>	61%	Yellow
4/30/2004	<p>This project is borderline yellow but still more in the green phase due to section 10.1.</p> <p>10.1: The first part of the handbook has been posted.</p> <p>10.2: The revised Direct Loan Entrance Counseling Guide are to be delivered to the warehouse on 4/30/2004. Review of revised Direct Loan Basics and Direct Loan PLUS Basics brochures continues on track with anticipated printing by the middle of June 2004. There are 17 back-ordered requests at the warehouse. These requests are for the Direct Loan PLUS Basics brochure that is currently being revised.</p>	59%	Green
11	ADS	<i>Develop and deliver program and technical training for schools through a combination of videoconferences, web-based training, and classroom experiences.</i>	
5/13/2004	<p>Award new training contract by April 2004: Longer-than-anticipated review process has moved award date from April to May. No training will be affected by this change in award date.</p> <p>Contract award still expected in May. Panel has completed review of business proposals and technical proposals</p> <p>Implement new registration system by March 2004: Winning vendor has been selected. Final paperwork issues will be completed within one week, Award now expected by 5/7/04.</p> <p>The Procurement was completed on 5/12. System will be "live" on 5/28. The current system expires on 5/17. During the two week period of "Down time" we will register trainees manually. There currently is only one course (July 12-16) for which a trainee is likely to register during this period, and there are approximately 20 slots left for this course.</p> <p>On an ongoing basis, review and analyze participant/instructor evaluations of training sessions, attendance data, adherence to budgetary constraints, and production schedules to ensure optimal delivery of FSA training programs. Will report the outcome of these analysis periodically. Data for Electronic Application Processing training will be compiled after these sessions end in April."</p>	70%	Yellow

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>		<i>%Complete</i>	<i>Status</i>
		<i>Status Date</i>	<i>Comments</i>		
		4/30/2004	<p>--Award new training contract by April 2004. Longer-than-anticipated review process has moved award date from April to May. No training will be affected by this change in award date.</p> <p>--Implement new registration system by March 2004. . Winning vendor has been selected. Final paperwork issues will be completed within one week, Award now expected by 5/7/04.</p> <p>--On an ongoing basis, review and analyze participant/instructor evaluations of training sessions, attendance data, adherence to budgetary constraints, and production schedules to ensure optimal delivery of FSA training programs. Will report the outcome of these analysis periodically. Data for Electronic Application Processing training will be compiled after these sessions end in April."</p>	65%	Yellow
13	BS		<p><i>Enhance program monitoring and oversight.</i></p>		
		5/12/2004	<p>.Total non-consolidation loan recoveries were \$ 983.6 million, an increase of 28 percent over the same period, May 7, 2003, last year. This represents 6.18 percent of the FY04 portfolio balance.</p> <p>.The Default Management Work Group has identified gaps in the Default Management Inventory related to the Perkins past due defaulted loan portfolio. The Group is working with policy, ASED and schools to establish a threshold for transferring specific defaulted Perkins loans from schools to the Department. Direct Loan Late Stage Delinquency Program (LSDP) staff is working with ACS on a new initiative to monitor the success of the LSDP as one of the new default prevention measures. The Lifetime Default Rate (LTDR) will also be a new measure that FSA might use for default prevention.</p> <p>.The independent Verification and Validation (IV&V) contract has been awarded. One of the first deliverables under the contract will be to develop a project plan that will detail the processes that will be reviewed through the end of FY2004. Once the project plan is delivered, this action item will be closed.</p> <p>.The 20% reduction in overpayments and the 10% reduction in underpayments on consolidated loans were achieved for the month of April.</p> <p>.The goal to increase the cure rate on 181-360 day non-consolidated Direct Loans by 1 percent over FY2003 was achieved in April. The goal for FY2004 is 55.1 percent. The actual rate for April 2004 was 59.1 percent, an increase of 4 percent.</p>	57%	Green
		4/30/2004	.	50%	Green

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>		<i>%Complete</i>	<i>Status</i>
		<i>Status Date</i>	<i>Comments</i>		
		4/30/2004	Total non-consolidation loan recoveries were \$865 million, an increase of 27 percent over the same period, April 25, 2003, last year. This represents 5.12 percent of the FY04 portfolio balance. The summaries for 1994, 1995 and 1996 Lifetime Default Rates (LTDR) were updated March 31, 2004. The data is detailed by school type. Results were presented to the Management Council on April 23 and well received. Analysis has begun on 1997 and 1998. Further analysis of 1994,1995,and 1996 will include state of residency of the borrower, average loan size, type of loan, etc. The Department is currently reviewing updates to the security plan and security procedures. The review will continue throughout the next month. Implementation of the changes recommended in the GAO Audit as well as the FISMA Audit will conclude this task. Those changes will be tracked over the next 3 months to completion. The CSB web team is reviewing the design plan for integration of the Consolidation and Servicing websites. E servicing has increased in the EDA program over the past 6 months from 600,000 participants to just over 655,000 participants.	50%	Green
14	BS		<i>Implement plan to provide high quality customer service to the Direct Loan portfolio.</i>		
		5/12/2004	Work is moving forward on the integration of the Direct Loan website and the Loan Consolidation websites. The new CSB website is scheduled to be completed as part of Phase 1 delivered October 8, 2004.	60%	Green
		4/29/2004	The CSB web team is reviewing the design plan for integration of the Direct Loan and Servicing websites. E servicing has increased in the EDA program over the past 6 months from 600,000 participants to just over 655,000 participants.	60%	Green
		4/28/2004	The CSB web team is reviewing the design plan for integration of the Direct Loan and Servicing websites.	50%	Green
15	BS		<i>Implement plan to improve contractor oversight and performance related to Direct Loan Consolidation overpayments and underpayments.</i>		
		5/12/2004	The 20% reduction in overpayments and the 10% reduction in underpayments on consolidated loans were achieved for April. The target for overpayments for April was \$2,265,585; the actual dollar amount was \$2,022,430. The target for under payments for April was \$778,092; the actual dollar amount was \$676,320. Consolidation staff will work to maintain the 20% reduction in overpayments and the 10% reduction in underpayments each month thru September 30, 2004.	60%	Green
		4/28/2004	Consolidation overpayments and underpayments are reported monthly. The next report will be submitted May 15, 2004	50%	Yellow
16	FPS		<i>Perform National Student Loan Data System (NSLDS) maintenance and operations activities.</i>		
		5/14/2004	NSLDS Maintenance and Operations Activities operating efficiently. The April benchmark report was reviewed and distributed. A business case to regularly monitor the functionality of GA and lender reasonability will be presented to the IPC on Friday, 5.14.2004 for their consideration.	75%	Green
		4/30/2004	NSLDS Maintenance and Operations Activities operating efficiently. Task order work is complete. A new task order for Guaranty Agency reasonability will be opened for the new contractor.	68%	Green
19	FPS		<i>Perform maintenance and operations activities for the Financial Partners Data Mart.</i>		

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>			<i>%Complete</i>	<i>Status</i>
		<i>Status Date</i>	<i>Comments</i>			
		5/14/2004	The contractor completed the April FP data load with feeds from NSLDS, LaRS and PEPS.		63%	Green
		4/30/2004	The contractor made all identified changes to the scorecards. Financial Partners will test these changes within the next few weeks.		55%	Green
20	FPS	<i>Perform Financial Partners Portal operations activities.</i>				
		5/14/2004	April Web Trend Report submitted. All Focus Group issues have been addressed.		81%	Green
		4/30/2004	Financial Partners Users Community updates were deployed on Sunday, 4.18.2004.		70%	Green
21	FPS	<i>Perform Leveraging Educational Assistance Partnership/ Special Leveraging Educational Assistance Partnership (LEAP/SLEAP) activities.</i>				
		5/14/2004	The status has not changed as the application period for the 2004-2005 award year is still open and states are applying for funding. All applications are to be submitted by Friday, 5.28.2004. Because this is a formula grant program, any requests for an extension to the deadline will be considered on a case-by-case basis. As applications are submitted and are being reviewed by the Department. The processing and awarding of grant awards will be conducted after the closing date.		79%	Green
		4/30/2004	The Office of Management and Budget has cleared next year's Application to Participate in LEAP and SLEAP Programs. The next expiration date of the form is 4.30.2007. The application period for the 2004-2005 award year is still open. States are to submit their applications by Friday, 5.28.2004. As applications are submitted, they are being reviewed by the Department. The processing and awarding of grant awards will be conducted after the closing date.		79%	Green
22	FPS	<i>Perform Voluntary Flexible Agreement (VFA) activities.</i>				
		5/14/2004	Cost Neutrality Analysis and Recommendations were reviewed with FSA COO and CFO on Tuesday, 5.4.2004. Next steps include sharing the information with Sally Stoup before discussions with the individual VFA guarantors. Recommendations from the Cost Neutrality analysis include the implementation, monitoring, and reporting of performance benchmarks. This recommendation addresses project 22.2. The procedures and benchmarks for evaluating and approving new VFA applications is anticipated to be complete by Wednesday, 6.30.2004 when the Colorado VFA clears Congress and is executed. Testing of the benchmarks will begin with the receipt of the next VFA proposal received by FP.		85%	Green
		4/30/2004	The Cost Neutrality Analysis and results/recommendations will be presented to Terri Shaw tentatively the week of May 3. The presentation will include the proposed benchmarks developed under the Performance Measure Assessment and Benchmarking report initiative. Updates were made over the past two weeks to the draft VFA evaluation process. The initial steps and associated timeframes with the VFA evaluation process will be tested beginning the week of May 3rd with a new VFA proposal from the National Student Loan Program (NSLP).		82%	Green
23	FPS	<i>Perform maintenance and improvements to the Financial Partners' Electronic Records Management (ERM) system in order to enhance use.</i>				
		5/14/2004	FP and SEC approved the FP and SEC completed draft report that identifies findings from business unit meetings and FSA integration/upgrade opportunities.		70%	Green

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		4/30/2004	FP and SEC met and discussed priorities for system enhancements and has determined estimated costs (based on prices listed in task order). Likewise, meeting was held with Fedstim (COTR) regarding potential upgrades and costs and what next steps FP and SEC plans to take.	55%	Green
25	FPS	<i>Enhance program monitoring and oversight.</i>			
		5/14/2004	The CFOs for the five GAs selected for the E&Y audit have been contacted. The national review teams conducted one program review and participated in the second CRI pilot review. Third party audit review staff continues to respond to lenders requesting assistance. Review of A-133 GA compliance audits is ongoing. HQs and Regional staff continue working on calculations for both the GA and Lender scorecards. NSL staff presented a business case for a vulnerability assessment of the National Student Loan Data System to the DSG on Thursday, 5.6.2004 and will be presenting to the IPC on Friday, 5.14.2004.	56%	Green
		4/30/2004	Each of the 5 guaranty agencies selected by Ernst & Young for site visits has been contacted to discuss specifics of the visit. The national review teams completed program reviews of two more guaranty agencies. Third party audit reviews are ongoing. Lenders continue to request assistance. Resolution for identified miscalculations occurring in the GA and Lender scorecards have been determined. Approvals are pending based upon test results. NSL staff is drafting a business case to obtain funding for a vulnerability assessment of the National Student Loan Data System.	53%	Green
26	CFO	<i>Sustain clean audit opinion and address material weaknesses and reportable conditions identified in annual financial statement audits.</i>			
		5/14/2004	The first of five site visits will start Monday, May 10th. Over 60 FSA PBC items have been provided, many of them significant.	20%	Green
		4/30/2004	Both the financial statement as well as the IT portion of the audit has started. Site visit preparation is in full swing. In addition, we have already prepared and turned over 50 PBC items including downloads and system narratives.	15%	Green
27	CFO	<i>Perform internal control reviews to enhance financial management.</i>			
		5/14/2004	The Internal Control Statement of Objectives and Independent Government Cost Estimate have been delivered to Contracts. FSA CFO staff continue to work with Contracts to prepare the Request for Proposal for competition. No change in status from the last report.	19%	Green
		4/30/2004	The Internal Control Statement of Objectives and Independent Government Cost Estimate have been delivered to Contracts. FSA CFO staff continue to work with Contracts to prepare the Request for Proposal for competition. No change in status from the last report.	19%	Green
28	CFO	<i>Finalize FY 2002 and FY 2003 cost accounting model and develop baseline FY 2002 unit costs.</i>			

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		5/14/2004	FSA Federal staff finalized the reconciliation of the FY2003 Statement of Net Cost to the Status of Funds and the ABC download data. We have begun on the FY2002 reconciliation. Also, we have begun to collect information regarding the Departmental charges to FSA. The ABC contract has been awarded; a revised project plan will be completed to ensure that GAO deadlines can still be met (i.e., FY2002 model completed by July 2004, FY2003 model completed by end of September 2004, FY2004 model completed by December 2004).	23%	Green	
		4/30/2004	FSA Federal staff continue to reconcile the FY2003 Statement of Net Cost to the Status of Funds and the ABC download data. We continue to await a final contract award. No significant change in status from the last report.	22%	Green	
29	CFO	<i>Sustain and improve timely reconciliations and implement other procedures needed to comply with FY 2004 accelerated reporting requirements.</i>				
		5/14/2004	Reconciliation Reengineering Project: Received revised proposal dated 4-30-04 from vendor in response to FSA's request for additional clarification of approach level of effort estimate. Conducted a review of proposal, and completed and submitted necessary evaluation. Continued to internally identify and implement quick process improvements and install/implement CheckFree. Desk Operating Procedures: Received revised draft of the 2 desk operating procedures. Reviewed and returned to Deva for rework. Began review of DL Unapplied procedures. Other: Established connectivity to VDC and tested limited CheckFree functional on FSA test desktop. Working on rolling-out CheckFree client software to remaining 4 FSA computers for users included in the CheckFree pilot program.	34%	Green	
		4/30/2004	Reconciliation Reengineering Project: Conducted negotiation session with Cotton and Co., to resolve concerns with 3-30-04 proposal submitted in response to issuance of revised RFP. Cotton and Co., is to issue a revised proposal to perform reengineering of reconciliations included in the pilot program by 4-30-04. Continued to identify and implement quick process improvements and install/implement CheckFree. Desk Operating Procedures: Provided comments to the contractor responsible for drafting procedures for 2 of the 8 reconciliation procedures. Continuing to review procedures. Other: FSA-CIO installed CheckFree on FSA desktop on 4-16-04. Currently configuring application to resolve connectivity issue between the VDC and FSA.	32%	Green	
30	CFO	<i>Manage FMS operations.</i>				
		5/14/2004	FMS Operations continues to operate smoothly. The April accounting period was closed again within 2 business days, all transaction processing SLA targets were met in April, and the help desk operated within prescribed parameters in April.	60%	Green	
		4/30/2004	FMS Operations continues to operate smoothly. The April 18th scheduled release was bumped to the following weekend, due to an emergency OCIO patch release on the weekend of 4/18. The release occurred successfully on the weekend of 4/25.	57%	Green	

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31	CIO	<i>Develop and deploy Enterprise Performance Test Architecture.</i>				
		5/14/2004	Security paper work received and being processed. Cubes have been assigned and equipment is being installed.	20%	Green	
		5/7/2004	Contract was awarded to VIP. Cubes have been assigned. Processing security paperwork. Contract start date is 5/17.	20%	Green	
32	CIO	<i>Provide Enterprise and Data Architecture management.</i>				
		5/14/2004	Distributed FY06 CPIC Packets to the Business Owners. Shipped a Primary Line of Business (LOB) Enterprise Report to the EPMS Team providing them with an analysis tool to compare primary LOBs across FSA applications. EA Team provided consulting support (supplement to the ED ITIM liaison) at FSA's FY 05/06 Select Phase Open Houses. Presented OMB FEAPMO Support with a list of process improvement questions regarding the usability of the "Agency EA Self Assessment". Met with ED EA Team to align the FSA EA Self Assessment with ED's. Participated in the CIO Council's Chief Architect's Forum meeting focused on "Consolidated Infrastructure Exhibit 300 and supported the next meeting by providing input to the "Consolidated EA Exhibit 300" meeting agenda and will help facilitate the next meeting.	40%	Green	
		4/30/2004	Presented EA Overview to the Business Technology Integration Group. The EA Team will be meeting with the Business Owners to discuss alignment of activities including Integration, Business Process Modeling and a review of collaboration tool options and centralized storage of enterprise assets. Will also be providing the Business Owners with their FY06 CPIC Packets containing Reference Model material collected to-date which is aligned with the latest OMB Guidance. Also agreed with ED EA to put more emphasis on creating "inventories" making it possible to synthesize the FSA EA into the larger ED EA. This also allows us to make more comprehensive definitions of EA that may apply across all POCs. The Data Architecture and EA Teams successfully merged the CPIC and DA Popkin encyclopedias into the CPIC environment on Popkin version 9.1.23.	45%	Green	
33	CIO	<i>Provide security and privacy support to FSA business units.</i>				
		5/14/2004	Completed Career Zone Security Training. Working on database numbering system for security findings resulting from OIG/GAO audits, Risk Assessments, Certification Reviews, and Self-Assessments. Met with Symantec to discuss Patch Management.	65%	Green	
		5/7/2004	Created slides for the marquee to advertise security awareness day. Provided input to CSB staff for C&A. Finalized Social Engineering training plan - training scheduled for 5/12. Met with System Security Officers to discuss Audit finding statuses.	65%	Green	
		4/30/2004	Continuing to create training material for Career Zone Specialized Security class. Updated Security Process Guide to include requirement for completing access reviews, and included template for validation of the review by the System Manager.	87%	Green	
34	CIO	<i>Provide Integrated Technical Architecture (ITA) and Enterprise Application Integration (EAI) maintenance and production support.</i>				

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		5/14/2004	The ITA Team Provided troubleshooting and application testing support for eCB and eZ-Audit. Continue efforts supporting Oracle Migration initiatives. Developed four additional Startup an/shutdown scripts for Development and applications servers. Authored two ITA documents; Fin_WAIT_2 Maximum number of calculations, and FSANet Installation Guide.	35%	Green	
		5/7/2004	Reviewed migration plans for the switchover to CSS Load Balancers. Provided support for eZ-Audit environment problems. Continued implementation of EAI IP security exit in development and test environments. Began planning to migrate 3rd party testing from SAIG prod to SAIG test. Continuing analysis into re-hosting LOWeb application at TSYS. Implemented custom reports and charts on EAI web sites.	35%	Green	
		4/30/2004	Performed troubleshooting support for the eCB testing environment and eZ-Audit testing environment. Deployed applications for eZ-Audit and EAI Web. Worked with CSC to apply a work-around to Student Portal memory leak	31%	Green	
36	CIO	<i>Continue Enterprise Quality Assurance Program to support the FSA CIO in conducting systems assessments and evaluations consistent with best practices for Solution Life Cycle (SLC) and Capital Planning and Investment Control (CPIC) processes.</i>				
		5/14/2004	CSB IV&V support on track and on schedule. Coordinating with Steve Allison for date to brief DSG and IPC on CSB. IV&V support (first six months) to EAI / ITA project awarded on May 7, 2004. Security Support (first six months) to COD (Don Dorsey, SSO) awarded on May 11, 2004. FMS FY04 IV&V support on track and on schedule. Security support to FMS (Danny Dytnag) is on track and on schedule.	65%	Green	
		5/7/2004	Completed QA Team procurement of CSB IV&V support award on 30 April 2002. Conducted pre-kickoff coordination meeting with BSC Systems on 3 May and scheduled IV&V kickoff meeting with CSB Development Leadership for 6 May. CSB IV&V support on track and on schedule. QA Team conducting market research on candidate 8(a) vendors to support continued FY04 Post-Implementation Review (PIR) efforts. IV&V support to EAI & ITA project in award phase with FEDSIM contracting staff. Security support to COD in award phase.	58%	Green	
		4/30/2004	QA Team procurement of CSB IV&V support in award phase with FEDSIM contracting staff. CSB - IV&V support plan remains on track and on schedule for work to begin the week of May 3, 2004. QA Team conducting market research on candidate 8(a) vendors to support continued FY04 Post-Implementation Review (PIR) efforts. IV&V support to EAI& ITA project in award phase with FEDSIM contracting staff. Security support to COD remains in RFQ phase.	54%	Green	
		4/29/2004	QA Team reviewing is CSB IV&V support task Management and Cost proposals. CSB Development Re-Sequencing resulted in a slight increase to the FY05 cost estimates. CSB - IV&V support plan remains on track and on schedule. IV&V award planned for week of May 3, 2004. QA Team accepted the PIR for Financial Partners Data Mart, Release 2 & 3. Acquisition for security support to COD team and IV&V support to EAI&ITA is moving forward. Task orders with vendors for review and response to RFQ.	54%	Green	
37	CIO	<i>Support ED, customers and business partners by participating in the President's Management Agenda E-Government initiatives.</i>				
		5/14/2004	Students.gov received 51,994 visits (1.3 million hits) during the week of May 2 - 8, 2004.	65%	Green	

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		5/7/2004	On April 29, ED forwarded a draft copy of the proposed eLoans transition strategy to OMB for their thoughts/comments. The eLoans partner agency leads are also sharing this document with their senior leadership (at ED, Bill Leiding, Jerry Shubert and Terri Shaw have been briefed on the strategy). On April 29, SBA signed the FY04 eLoans MOU. All five eLoans partner agencies have now signed the FY04 eLoans MOU. Students.gov activity for the week of April 25 - May 1 is estimated at 52,088 visits. In April 2004, an estimated 207,935 visitors came to students.gov - about the same as last month (March 2004), and 39% higher than the number of visits in April 2003. The May edition of InfoSource was mailed on April 29th. In order to provide greater list security and ease of use, ED is migrating all its mailing lists from ListProc software to ListServ software on 5/6/04.	58%	Green
		4/30/2004	GovLoans.gov was officially launched on Thursday, April 29, in conjunction with the GovBenefits second anniversary event. Congressman Adam Putnam (R, FL) presented a copy of a Congressional Resolution to GovBenefits and GovLoans recognizing the success of both of these E-Gov initiatives, and the innovative collaboration between the GovLoans partner agencies and GovBenefits that created GovLoans. The May edition of Students.gov InfoSource was mailed on April 29th. As of April 27, 15,195 people are subscribed to 'InfoSource', a subscription service that highlights the features of students.gov.	54%	Green
		4/29/2004	On April 20, the eLoans partner agencies met to discuss a draft transition strategy document for how the initiative could move forward in FY05 and beyond. The partner agency representatives will begin sharing it with their agency leadership for thoughts / comments. Also on April 20, the ED eLoans team briefed Bill Leiding on the proposed transition strategy, and plans to share the strategy with FSA leadership. On April 16 and 19, the GovLoans Working Group completed User Acceptance Testing of the new GovLoans site on the staging server, and provided the findings to the development team. The team is still on schedule to launch GovLoans to the public (as an integrated part of GovBenefits) on April 29. Students.gov received 51,879 visits during the week of April 11-17, 2004, an average of more than 7400 visitors/day.	54%	Green
38	OMBD		<i>Provide high quality information, research and informal problem resolution services to student loan borrowers and other participants in student aid programs.</i>		
		5/14/2004	Weekly surveys of customer satisfaction with research and general assistance cases score 1.9 or less on a scale of 1-5 with 1 being HIGHEST. Ombudsman Office Overall service rating 1.69 (through 5/7/04)	62%	Green
		4/30/2004	Weekly surveys of customer satisfaction with research and general assistance cases score 1.9 or less on a scale of 1-5 with 1 being HIGHEST, Ombudsman Office Overall service rating 1.72 (through 04/23/04)	58%	Green
41	CMS		<i>Plan and manage FSA conferences.</i>		
		5/14/2004	-Session evaluation results from the 2003 EACs and the 2004 Spring Conference have been sent to all presenters. -Analysis of overall conference evaluations from the Spring Conference is continuing. -Developing new procedures for EAC session reviews.	95%	Green
42	CMS		<i>Manage, develop and update content for FSANet.</i>		

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	5/14/2004	<p>WEB STATS of FSAnet for the month of April: -Successful hits for the entire site=318,223 -Average hits per day=10,607 -Home page hits=3,135 -Average Visits=8,256 -Average Visits per day=284 -Most active date=April 26 -Most active day of the week=Thursday -Most active hour of the day=9am to 10am</p> <p>The top five areas hit on FSAnet: Home Page, IT Security Portal, Our Performance-Five Year Plan, Career Zone, and FSA Reorg.</p> <p>Most downloaded files: Modernization Task Orders & Deliverables.</p>	60%	Green
	4/30/2004	<p>FSA Assists did not launch on April 18th due to FSA CIO (VDC) system upgrades that have not been completed yet. We expect a launch within two weeks.</p> <p>WEB STATS for April 1st-15th: -Successful hits for the entire site=172,323 -Average hits per day=11,488 -Home page hits=1,737 -Average Vists=3,715 -Average visits per day=247 -Most active date=April 2 -Most active day of the week=Thursday -Most active hour of the day=10-11am</p> <p>Top 5 sections hit of FSAnet: Home Page, IT Security Portal, Career Zone, RSA Reorg, and ASEDs FAQs.</p>	55%	Green
43	CMS	<p><i>Manage controlled correspondence functions including FOIA, privacy and controlled mail.</i></p> <p>5/14/2004 Controlled Correspondence - 175 letters were handled by FSA-all are on time.</p> <p>4/30/2004 FOIA Requests from April 16th to 29th: There have been 8 new cases filed and 10 cases closed.</p> <p>Controlled Mail: 308 letters were handled by FSA and all are on time.</p>	60%	Green
44	CMS	<p><i>Develop and implement internal and external communications strategy.</i></p>		

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	5/14/2004	<ul style="list-style-type: none"> -Bill Leith was interviewed by Bucks County Courier Times concerning the FAFSA and timelines, deadlines, etc. Article should appear in two weeks. -FSA Weekly News to employees was sent out on time. -Hot Issues List was sent to Sec. Paige on time. OSAC, DeMarge College and EP are at the top of the list. -Weekly Report to the Secretary was submitted on time. -Lobby Monitor updated with Dashboard data as of 5/13. -Information Requests - Currently we have tracked 218 inquiries and there are 20 requests open. Info on EFC, Perkin Loans, and loan volume for DL & FFEL schools are most current requests. -HR Employee Video is still on track for completing in June, even though OPA's videographer's computer crashed. -Daily news clips ongoing. 	60%	Green
	4/30/2004	<ul style="list-style-type: none"> -Federal Times article was published quoting Sue Szabo. -FSA Weekly News was on time. -Hot Issues List to the Secretary was on time. -Lobby monitor dashboard updated with 4/26 data. -Information Requests- To date, there have been 202 requests. Of these requests, 28 are open and one is on hold. Most noted requests include: answering Sen. Kennedy about whether Sallie Mae paid the department for their servicing error (yes); OLCA requested California school DL and FFEL loan volumes; requests for LEAP/SLEAP data. -FSA Now published for April. -Video filming of FSA staff for HR's employee orientation video was completed. Video is still targeted to be completed in June. -Communications strategy is in line for development concerning DL consolidation. 	55%	Green
45	EPMS	<i>Mature Enterprise-wide Procurement Plan.</i>		
	5/14/2004	<p>One objective for finalizing the final draft of the Enterprise-Wide Procurement Plan (EWPP) is delayed pending the completion of SAIG and VDC market research. The SAIG market research is scheduled to be completed by the end of March, which leaves little time to incorporate the research results into the EWPP by April 1, 2004. While preliminary research has been accomplished, the main thrust of the VDC market research will not start until the end of April 2004. These two delays impact the ability to meet an internal objective of April 1, 2004. Therefore, the overall rating for project 45 is moved from Green to Yellow. ASI previously proposed in their project schedule a systems handover of the procurement planning database on March 30, 2004. A performance review of the progress completed to date indicates that ASI may not meet this deadline. The new deadline for ASI is April 15, 2004 for the senior management demonstration and May 3, 2004 for implementation on the Ed network. The Department of Education placed the requirement of putting the EWPPDb in the Technical Review Board process, resulting in a month expansion for full implementation on the network. The forecast of completing project number 45 overall objective is still achievable by the plan date of September 30, 2004. The status is changed to yellow based on the status of task 45.1, and will remain yellow until progress is achieved on subtask 45.1.</p>	70%	Yellow

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		4/30/2004	One objective for finalizing the final draft of the Enterprise-Wide Procurement Plan (EWPP) is delayed pending the completion of SAIG and VDC market research. The SAIG market research is scheduled to be completed by the end of March, which leaves little time to incorporate the research results into the EWPP by April 1, 2004. While preliminary research has been accomplished, the main thrust of the VDC market research will not start until the end of April 2004. These two delays impact the ability to meet an internal objective of April 1, 2004. Therefore, the overall rating for project 45 is moved from Green to Yellow. ASI previously proposed in their project schedule a systems handover of the procurement planning database on March 30, 2004. A performance review of the progress completed to date indicates that ASI may not meet this deadline. The new deadline for ASI is April 15, 2004 for the senior management demonstration and May 3, 2004 for implementation on the Ed network. The Department of Education placed the requirement of putting the EWPPDb in the Technical Review Board process, resulting in a month expansion for full implementation on the network. The forecast of completing project number 45 overall objective is still achievable by the plan date of September 30, 2004. The status is changed to yellow based on the status of task 45.1.	70%	Yellow
46	EPMS	<i>Develop acquisition workforce.</i>			
		5/14/2004	The acquisition workforce includes APCMG, contracting officers on detail to FSA, and the program managers serviced by APCMG. The training plan for APCMG staff has been approved and training is being scheduled. A corresponding training evaluation process has been developed to track the effectiveness, timeliness, and job application of each training event. The staff completed 11% of their overall training during March (32 days), and will have completed 26% by the end of April (74 days). By the end of April 04 the contracting officers will only be staffed at 20% of the workforce required to support contract award and administration at an acceptable level. CPO is in the process of hiring additional Contract Specialist, that will help with the shortage of contract officers.	50%	Green
		4/30/2004	The acquisition workforce includes APCMG, contracting officers on detail to FSA, and the program managers serviced by APCMG. The training plan for APCMG staff has been approved and training is being scheduled. A corresponding training evaluation process has been developed to track the effectiveness, timeliness, and job application of each training event. The staff completed 11% of their overall training during March (32 days), and will have completed 26% by the end of April (74 days). By the end of April 04 the contracting officers will only be staffed at 20% of the workforce required to support contract award and administration at an acceptable level. CPO is in the process of hiring additional Contract Specialist, that will help with the shortage of contract officers.	50%	Green
47	EPMS	<i>Implement enterprise contract performance monitoring measures against new systems contract awards.</i>			
		5/14/2004	Completion of the subordinate success measures is dependent the CSB and FEBI projects. Training and meetings with CSB personnel have been scheduled to complete the CSB milestone. FEBI incorporation into the process is still dependent on the FEBI acquisition schedule.	65%	Yellow
		4/30/2004	The Enterprise Process is still being established. Contractor support has been engaged to identify the existing measures and processes being used on FSA contracts. Significant effort is required over the next six months to accomplish this task. At the present progress rate the task is at risk and management is in the process of evaluating a methodology for maximizing efforts to get this task on a positive path.	60%	Yellow
48	EPMS	<i>Continuously update and monitor procurement internal controls.</i>			

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		5/14/2004	While internal controls are in place establishing a baseline to assess success measures has proven difficult as FSA specific data is not easily severable from Department data. FSA has eliminated four (4) large sole source contracts to date this FY and anticipates only one extension. This result compares favorably with FY 03 in which 3 extensions were made. The existing reporting methodologies are currently being evaluated and techniques are being developed for acquiring the required data.	65%	Yellow
			Acquisition process measurements are underway with the establishment of timelines for various type of procurement. Refinement of those templates will be an on-going exercise.		
		4/30/2004	While internal controls are in place establishing a baseline to assess success measures has proven difficult as FSA specific data is not easily severable from Department data. FSA has eliminated four (4) large sole source contracts to date this FY and anticipates only one extension. This result compares favorably with FY 03 in which 3 extensions were made. The existing reporting methodologies are currently being evaluated and techniques are being developed for acquiring the required data.	65%	Yellow
49	EPMS	<i>Increase contract dollars awarded to small businesses.</i>			
		5/14/2004	ILS BPA award made to Grant Thornton. Two Tasks also awarded with approximately 28% (\$400K) of the dollars projected to go to small business team partners.	60%	Green
			Will study CPSS to determine if there is a viable method to develop a SB baseline.		
		4/30/2004	NSLDS and EAI/TTA awards to Small Businesses reflect a net increase in dollars awarded to small business, however no baseline exists to truly measure against. The extraction of permanent data from data sources is in process so baselines can be developed for measuring performance and solutions approaches derived from data analysis and process development.	50%	Green
50	EPMS	<i>Continue to implement integrated project management oversight for FSA's system integration activities.</i>			
		5/13/2004	Continue to work with PM's to incorporate PMO oversight in all FSA activities. Have identified 60 projects and to date have 28 reporting into PMO. Plan is to work with a minimum of 3 PMs per week to roll all projects into PMO oversight.	47%	Green
		4/30/2004	Continue to work with FSA Project Managers to roll all FSA projects into reporting up to PMO. As of 4/30, have 24 projects reporting in. PMO currently providing direct assistance to 2 projects to help ensure they stay on schedule and within task order scope and costs.	50%	Green
51	EPMS	<i>Evaluate and implement selected project management standards based on the system development methodology (Solution Life Cycle).</i>			
		5/13/2004	No change in status as SLC process on hold during One Ed initiative.	08%	Red
		4/30/2004	No updates since last report as SLC project still on hold pending One Ed initiative.	08%	Red
52	EPMS	<i>Restructure integration leadership support to transition the majority of responsibility to FSA staff.</i>			

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		5/13/2004	Award made to Grant Thornton on 5/3. Kick off meeting held 5/11 and transition briefings with Accenture and business owners scheduled for week of 5/17. Responsibility for this reporting of this initiative will transfer to the ASEDS/Integration Group during the next reporting period as they are now leading this initiative.	70%	Green
		4/30/2004	Contract award presented to CRB week of 4/26. Award pending approval of Dep Sec. Draft transition plans received from Accenture and comments provided back. Final due 4/30. Decision made not to extend Accenture transition support past the current contract end date of May31st. FSA integration team currently defining roles, responsibilities and steps necessary to ensure smooth roll out with new contractor.	60%	Green
53	EPMS		<i>Prepare and continually monitor and report on the accomplishments of the High Risk Plan.</i>		
		5/14/2004	General FSA management and staff continue to talk with GAO and provide information as requested.	61%	Green
			<p>Financial Management FSA, OCFO, OIG and E&Y plan to attend Treasury training on the new 2004 closing package and Government-Wide Financial Reporting System. There are no overdue PBC items in the 2004 audit. The first GA site visit was completed by E&Y. Total non-consolidation loan recoveries YTD are 28% greater than the same period last year. Borrower Services is working on an initiative with their contractor to monitor the success of the DL Late Stage Delinquency Program. Direct Consolidation Loan over- and underpayments were reduced significantly in April. The cure rate on 181-360 day delinquent non-consolidation DLs continues to meet the FY 2004 goal of a 1% increase over 2003.</p> <p>Systems Integration The CSB IV&V contract was awarded 4/30. Data Strategy 2.0 meetings continue. The FFEL Data Flow and Student Enrollment Reporting workgroups are finalizing their recommendations. The Data Quality steering Committee is working the data quality issues identified in Data Strategy 1.0 through the ranking tool to validate the factors and weights used. CSB is being rebaselined to reflect the contractor's request to delay implementation. GAO requested the current status of CSB, FEBI and IPM.</p> <p>Program Integrity Campus Based Operations and School Relations Branch collaborated on an initiative to contact all 165 institutions with Excess Liquid Capital in their Perkins loan fund. 117 of the schools have committed to raise their expenditure level and 22 schools have returned funds. EZAudit refresher training is preparing ASEDS staff for the upcoming heavier workload and implementation of enhancements. YTD audit resolutions are at the 95% goal.</p> <p>PBO Management FSA provided GAO with additional information on training opportunities for staff. The Five-Year Plan comment period ended, the comments and proposed Plan revisions are under review by FSA management, and the Plan should go into Departmental clearance next week. GAO has requested a concall next week on FSA's draft Five-Year Plan and the 2003 Annual Plan to make sure they understand the annual and strategic goals presented in those documents.</p>		

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>	<i>%Complete</i>	<i>Status</i>
<i>Status</i>	<i>Date</i>	<i>Comments</i>		
	5/3/2004	<p>General</p> <p>FSA management and staff continue to talk with GAO and provide information as requested.</p> <p>Financial Management</p> <p>The Department remains at green for status and progress on the Financial Performance component of the PMA at 3/31/04. ED must closely examine whether Federal Perkins Loans assets held at institutions of higher education are susceptible to improper payments. Ed must identify all programs at risk for improper payments by 5/31 and brief OMB on the sampling/verification plan for those programs. ED remains at red for status and green on progress on the Budget and Performance Integration component of PMA. During the 3rd quarter, ED must brief OMB on what FSA will use as efficiency measures (unit cost metrics) for each program to ensure receiving a yellow on status for that quarter. The financial statement and IT portion of the FY 2004 audit work has begun. The first GA site visit is to occur the week of 5/21. Credit reform estimates are to be included in the June 2004 quarterly statements. OIG has not met their goal of accelerating all deliverable due dates the same number of days we must accelerate reporting to OMB and therefore believes our internal goal of delivering to OMB by 11/1/04 may not be achieved. Installation and implementation of CheckFree software is in process.</p> <p>Systems Integration</p> <p>FEBI Phase I proposals are under review. The CSB contractor has requested a delay in implementation. The BTIG is meeting to assess FSA's ability to conduct all the concurrent systems initiatives and to reprioritize acquisitions for fiscal years 2005 and 2006. Meetings are continuing on the various data strategy components. The FFEL data flow and enrollment status reporting working groups held meetings this week with the community on identified options. The data quality steering committee has developed a process, including ranking criteria, for assessing and prioritizing data quality issues. One of FSA's PMA planned actions for the 3rd quarter is updating OMB on progress in using the data strategy initiative to identify data deficiencies, revise priorities, and reengineer FSA processes.</p> <p>Program Integrity</p> <p>FSA remains at yellow for status and green for progress on the PMA component to eliminate fraud and error in student aid programs and deficiencies in financial management at 3/31/04. During the 3rd quarter, FSA must agree with OMB on a plan and framework for a feasibility analysis of using loan-level data to calculate partner payments and a schedule for completion of the analysis. OMB believes FSA should, in finalizing its data strategy, establish and track metrics for gauging its fraud and error reduction activities. The March 2004 cure rate on delinquent non-consolidation loans exceeded the goal. Total YTD recoveries of non-consolidation loans increased 28% over the comparable period in FY 2003, and we are on target to make our FY 2004 goal. The FY 2004 cumulative audit resolution rate stands at 95%. The Portfolio Risk Management Group has developed a direct loan lifetime default rate for loans originated in FYs 1994 - 1996, including detailed data by school type. This information will be discussed with other offices for buy-in before finalization.</p> <p>PBO Management</p> <p>The Department remains at yellow for status and green for progress on the Human Capital component of the PMA at 3/31/04. Progress will fall to yellow in the 3rd quarter if IG corrective action plans are not on track and deliverables do not reflect how the Strategic Investment Process is integrated with the Department's human capital management initiatives. FSA had a concall with GAO on 4/23 to answer questions related to our draft Human Capital Plan, awards,</p>	57%	Green

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>		<i>%Complete</i>	<i>Status</i>
		<i>Status Date</i>	<i>Comments</i>		
			the ASEDS reorganization, performance agreements, the Career Zone, skills inventories and succession planning. The meeting was productive and positive. FSA is sending additional requested data to GAO this week and next. FSA's draft Five Year Plan went to Congress and comments are due back 4/30. The COO scheduled a meeting with GAO, FSA's CFO, Linda Paulsen and Marge White to recognize Linda's retirement and the transition of her duties.		
54	AWSS		<i>Deliver workforce development and support programs.</i>		
		5/14/2004	The overall percentage for Project 54 is 80% - Green as of 5/10/04. With the exception of milestone # 3, all on target for completion on or before 9/30/04.	80%	Green
55	AWSS		<i>Perform facilities management activities.</i>		
		5/14/2004	No change. Status the same.	90%	Green
		5/3/2004	Only the Administer Records Management Milestone remains open. Success measures have been met for 3 out of 4 Milestones. We are constantly working on space, security, facility, records management, transit, and parking issues to improve the working environment of FSA employees.	90%	Green
56	CFO		<i>Review Credit Reform estimates.</i>		
		5/14/2004	The subgroups of the Credit Reform Work Group (CRWG) have continued to make progress. The analytical tools subgroup completed an initial draft of a simplified student loan estimation model, the initial purpose of which will be to assess and corroborate the output of the official Student Loan Model (SLM). The business process subgroup presented to business owners an overview of the SLM, and suggested improvements to it for FY04. The contract to provide credit reform technical support, to supplement the FSA subgroup members, was awarded this week. Although FSA had planned for this contract to be awarded several months ago, the subgroup members believe this project can remain on track.	20%	Green
		4/30/2004	The subgroups will continue to coordinate their work with FSA business owners. The project continues to anticipate the arrival of contracted technical support to supplement the FSA subteam members. The contracted support team was expected to start working several months ago, but there have been lengthy contractual delays. However, if a contract is let in the next several days, the CRWG members believe this project can remain on track.	16%	Green
58	CFO		<i>Support the implementation of Oracle Federal Financials Release 11i.</i>		

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>	<i>%Complete</i>	<i>Status</i>
<i>Status</i>	<i>Date</i>	<i>Comments</i>		
	5/14/2004	<p>The FSA Oracle 11i team has delivered the preliminary FSA requirements matrix and the FMS reports inventory, with approximately 701 reports to the Oracle 11i environment implementation (Ollie) team. This information was categorized by the functional sub-teams (FSTs) that would be managing the requirements throughout the project.</p> <p>The Ollie team held a FST kick-off meeting to prepare Ollie team members for their work on the FSTs. In this kickoff meeting, core Ollie team members received preliminary materials, working group meeting "rules of the road" and meeting schedules.</p> <p>Meetings continued with the implementation contractor to clarify the implementation methodology and to plan the FSA 11i support contractor's role in the implementation.</p> <p>The project plan for the FSA Oracle 11i support contractor was further drafted and has been vetted for review within CFO. The contractors have started on the initial tasks of further defining some of the preliminary FSA requirements through analysis papers.</p>	53%	Green
	4/30/2004	<p>Contract staff have assumed immediate responsibilities to manage the requirements gathering schedule and the capture of meeting minutes. Also, new contractor staff have been given significant amounts of reference materials (e.g., FSA Reports Inventory, FMS Business Process Analysis document) to review to glean either current FMS requirements or future Oracle 11i requirements. Now that the implementation contractor has been awarded and more detail regarding their implementation methodology and schedule is available, a more detailed support plan can be drafted for the FSA 11i support contractor.</p> <p>The Oracle 11i team continues to consolidate requirements in the requirements matrix. Initial meetings have been held with the implementation contractor to transfer ownership of the requirements matrix to them. Requirements that are not directly applicable to the Oracle 11i implementation will be captured and tracked by the FSA support contractor.</p> <p>The Department is now refining the definition of and list of members for the 11i functional subteams. The functional subteams are expected to begin discussions next week (i.e., the week of 5/3-5/7).</p> <p>The Department-wide implementation contract was awarded to IBM. FSA has begun to have meetings with IBM to (1) get an understanding of the implementation methodology that will be followed, (2) incorporate the current project plan into the implementation's schedule, and (3) share preliminary requirements with IBM.</p>	48%	Green
59	CFO	<i>Implement automated budget funding entry solution.</i>		
	5/14/2004	Both the EDCAPS and FMS task orders for this initiative have now been awarded. The EDCAPS contractor has delivered a final requirements document. The FMS contractor will be delivering a draft requirements document on Friday (5/14). Both task orders are on schedule; implementation schedules will be synchronized by the time the task reaches intergation testing.	35%	Green
	4/30/2004	Both the EDCAPS and FMS task orders for this initiative have now been awarded. The EDCAPS contractor has delivered a draft Requirements document. The FMS contractor is having requirements meetings with users in order to produce its own requirements document.	30%	Green

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>		<i>%Complete</i>	<i>Status</i>	
		<i>Status Date</i>	<i>Comments</i>			
60	CFO	<i>Implement Forms 2000 additional enhancements.</i>				
		5/14/2004	Completed.	100	Completed	
		4/30/2004	The initiative was implemented on-time and on-budget. Minor implementation issues relating to reporting and data conversion were resolved. The Production Migration deliverable verifying a successful migration and documenting the closure of the initiative will be sent to the Analysis Division.	100	Green	
62	BS	<i>Begin the implementation of Common Services for Borrowers (CSB).</i>				
		5/12/2004	Awaiting proposal from ACS regarding the request to rebaseline the CSB implementation scheduled. Preparation of the IT Investment Business case is underway. The new Spanish language loan consolidation web site is ready to move to systems acceptance testing. The Independent Verification and Validation (IV&V) task order has been issued and the IV&V contractor is working on staff recruitment efforts.	35%	Red	
		4/29/2004	FSA received a letter from ACS requesting a delay in implementation. The request is under review. ACS is currently validating and reviewing the project plan and schedule to determine appropriate revisions. ACS expects to deliver a revised schedule and project plan in May. The goal is to develop a realistic plan to complete the transition in the shortest and most efficient timeframe.	25%	Green	
		4/28/2004	Reports for this item are included in the milestones.	25%	Green	
63	ADS	<i>Improve school partner oversight.</i>				
		5/14/2004	Continued progress on remaining milestones 63.1, 63.6, and 63.9. See milestones for details.	62%	Green	
		4/30/2004	Progress continues on remaining milestones 63.1, 63.6, and 63.8. See milestones for details.	58%	Green	
65	ADS	<i>Create a target state vision of a Front End Business Integration (FEBI).</i>				
		5/14/2004	Progress being made and on schedule per project plan. Currently in Phase 2 of the solicitation and will begin negotiations with potential vendors. Due to federal contracts policy, updates on negotiations and progress can not be provided.	60%	Green	
		4/30/2004	April 6 - FEBI Pre-Bidders Conference. Approximately 190 vendor participants; April 15 - Response to RFP received as well as vendor comments relative to small business solicitation; Continue to update FEBI website and vendor library as appropriate.	55%	Green	
66	FPS	<i>Re-engineer NSLDS (Pending Data Strategy Outcome).</i>				
		5/14/2004	A request to cancel this effort for FY04 and shift it to FY05 will be resubmitted to the IPC. Due to dependencies to the outcome of other FSA business priorities (data strategy project) and funding, it is apparent this project will not begin in FY04.	00%	Green	
		4/30/2004	This project cannot begin as it is dependent upon the outcome of the data strategy project. FP will begin reporting on this project once the data strategy is determined.	00%	Green	

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>		<i>%Complete</i>	<i>Status</i>	
		<i>Status Date</i>	<i>Comments</i>			
67	ADS	<i>Prepare to implement IRS data match.</i>				
		5/14/2004	The IRS Workgroup has finalized a presentation for the Management Council that summarizes the work that the group has done to date and provides an overview of five possible IRS match scenarios. Members are working to get onto the Management Council Agenda. At this past week's Workgroup meeting members of the team developed proposed plans for conducting an IRS demonstration pilot in the first year(s) of implementation and are in the process of identifying the benefits and limitations associated with the proposed approach.	77%	Green	
		4/30/2004	At its last meeting (on 4/16/04) the IRS Match Workgroup identified a new IRS match implementation approach that it will incorporate into the presentation it is preparing for the Management Council. At this week's meeting on Friday, 4/30/04, the workgroup will continue to develop plans for conducting an IRS demonstration pilot in the first year(s) of implementation.	76%	Green	
68	AWSS	<i>Continue Learning Coupon program.</i>				
		5/14/2004	158 employees have used coupons. This is 32% of our goal of 45% of FSA employees (45% of FSA = 495). \$61,150 - or 30.2% of our goal - has been obligated. (Goal = 90% of \$225,000, or \$202,500). This usage pattern is in line with previous years. Posters have been delivered for publicizing the program. A customer satisfaction survey was launched this week. The Learning Coupon Online Database is still not live yet, hence the status is still yellow.	32%	Yellow	
		5/3/2004	As of 4/29/04, 130 coupons have been processed (approx. 27% of our goal) and \$49,413 obligated (24% of our goal). The deployment of the online database is still delayed at the VDC.	20%	Yellow	
		4/30/2004	As of 4/29/04, 130 coupons have been processed (approx. 27% of our goal) and \$49,413 obligated (24% of our goal). The deployment of the online database is still delayed at the VDC.	20%	Yellow	
69	AWSS	<i>Provide Career Zone services.</i>				
		5/14/2004	For the month of April, the Career Zone provided career management and developmental service to 113 FSA staff members. In addition to the Career Management workshops, the Career Zone introduced the LUNCH & LEARN series. The purpose of this offering is to provide staff an alternative learning opportunity in an informal environment. The feature book and movie for the month of April was Thinking for a Change by John Maxwell and Mission Success - Keys to Reaching Your Full Potential by James "JK" Kennedy, respectively. The Career Zone also provided workshops in April on Data Strategy, Intermediate Excel and Fundamentals on Title IV Administration. Evaluations of the Career Zone Services, particularly 1-on-1 counseling, increased from 4.33 to 4.84 on a 5 point rating system.	75%	Green	
70	ADS	<i>Increase Student Financial Aid program awareness.</i>				
		5/14/2004	FEBI Small Business Initiative kick-off was April 20, 2004. We are in the market research phase and draft Statement of Objectives (SOO) phase. Draft SOO to be posted to FedBizOps in June.	30%	Green	
		4/30/2004	The two Milestones associated with this project (70.1 & 70.2) are now rolled into the Front End Business Integration (FEBI) Small Business Initiative. This initiative will result in a contract award for a marketing and outreach provider by 9/30/04.	30%	Green	

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>		<i>%Complete</i>	<i>Status</i>
		<i>Status Date</i>	<i>Comments</i>		
71	ADS		<i>Reengineer EDEExpress.</i>		
		5/14/2004	Completion of the System of Records Notice (SORN) continues through the clearance process with an anticipated completion in late August. A list of issues identified during Acceptance testing has been forwarded to the contractor, and a meeting has been set up for Monday, May 17th to review them with Pearson. These changes are recommended in order to achieve a more user-friendly product that accurately calculates and tracks the return of Title IV funds. An adjusted date will be provided in the near future once this discussion has taken place. This product is non-year specific and delaying the posting will not impact schools adversely. There is currently a PC product that is available. However, we would like to make the product available to the aid community as close to the start of the 04-05 academic year as possible.	95%	Yellow
		4/30/2004	Completion of the System of Records Notice (SORN) continues through the clearance process with an anticipated completion in late July. Acceptance Testing for R2T4 on the web, release 1.0 and release 1.a have been tested and signed off by FSA. Based on regulatory guidance released by OPE on February 12, 2004, we have identified some key issues that we feel should be in the software so that schools are in compliance with the regulations. In addition, we are reviewing and requesting fixes of issues identified during Acceptance. These changes are necessary in order to achieve a useful and user-friendly product. This product is non-year specific and delaying the posting will not impact schools adversely. There is currently a PC product that is available. However, we would like to post the product before the 04-05 academic year begins in the fall of 2004.	95%	Yellow
73	CIO		<i>Develop FSA Security and Privacy Architecture Pilot.</i>		
		5/14/2004	The Access Manager product has been successfully tested with eZAudit and X-sites applications in the prototype phase. The Identity Manager product implementation and configuration is in progress. The Identity manager has been installed and configuring the product with FSA applications are in progress.	48%	Green
		5/7/2004	The Identity and access management products are currently being installed in VDC by IBM. Development machines have been allocated. The Identity manager product installation is proceeding on schedule. The access manager has generated some errors and trouble tickets are currently open with IBM and is in the process of resolution.	48%	Green
		4/30/2004	The prototype implementation in VDC is continuing. TIBM, ACcenture and FSA are visiting VDC from 5/3--5/7 to install the TAM and TIM products along with eZAudit and configure the application. After the initial configuration, access management, we are planning to test the access management and identity management capabilities of the product.	48%	Green
74	AWSS		<i>Implement Leadership Excellence development training.</i>		

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>		<i>%Complete</i>	<i>Status</i>	
		<i>Status</i>	<i>Date</i>	<i>Comments</i>		
			5/14/2004	<p>Leadership Excellence for this year is composed of these parts: establish an advisory group (done); create a development fund (yellow); implement a 360 assessment tool (yellow). There is no training proposed - there never was - so "training" needs to come off the title. The reason for the yellows are:</p> <p>Development Fund: I've had 2 briefings with the Management Council on a proposed method of selecting staff for leadership development. They have said they want to select the candidates as a group and they were prepared to discuss this at their May 3 meeting. They have not done so. What would get to green? We need the MC to discuss and select 8-10 folks in FSA to attend special outside-FSA development programs (such as FEI, etc.). I hope this will be done in the next couple of weeks.</p> <p>360 tool: The 360 tool is also yellow as I am waiting for the MC to decide if they want to pilot it themselves. A MC decision on this one way or the other would get us to green.</p> <p>5/13/04 - on 5/7 the Management Council selected a slate of 9 FSA staff to participate in the Leadership Development Fund. The Leadership Advisory Group has completed identifying and defining manager skills for the FSA skills catalog. The Management Council has not yet decided which 360 assessment tool to use.</p>	60%	Green
			5/3/2004	<p>Presentation to the MC on 4/23 - each business unit is asked to nominate staff for development opportunities and provide names on 5/3. MC will then determine which programs to procure. Survey of managers was completed - 50% response rate. The survey asked what kind of preparation managers would have liked as a new supervisor and what they need now. This is part of the planning for a New Supervisor Learning Track to be completed in FY04.</p>	10%	Yellow

FSA Milestone Status Report

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>	<i>Milestone#</i>	<i>Action Item</i>	<i>Status Date</i>	<i>Comments</i>	<i>%Complete</i>	<i>Status</i>
1	ADS	Implement student aid awareness initiatives.						
		1.1	Leverage partnership activities to disseminate FSA information.					
				5/14/2004	SAA participated in four continuing partnership activities – May 1, provided an overview of Federal Student Aid during the Student Financial Aid and Scholarship Workshop for parents and students sponsored by the Rollingcrest-Chillum Community Center Recreation Council in Hyattsville, MD. May 2 and May 5-6, exhibited materials and responded to questions from parents and students at the Nashville, TN and Edison, NJ National Association of College Admission Counseling college fairs. May 7-8, partnered with the Florida State Department of Education to present a financial aid workshop, and exhibited materials at the NAACP Youth Power Summit held in Miami, FL.	100%	Complete	
				4/30/2004	SAA participated in seven continuing partnership activities –April 19, presented a workshop to TRIO professionals on federal student aid and student loan default during the Annual Mid-Eastern Association of Educational Opportunity Program Personnel (MEAEOPP) 28th Annual Conference held in Charleston, WV. MEAEOPP comprises TRIO Professionals from the states of Delaware, District of Columbia, Maryland, Pennsylvania, Virginia and West Virginia. April 19, presented a brief overview of student aid informational materials and methods of dissemination as part of a financial literacy meeting sponsored by USA Funds Services. The purpose of the meeting was to preview and discuss resources available for inclusion in the USA Funds High School Life Skills financial literacy program. Representatives from the Jump\$tart Coalition, National College Access Network, the U.S. Department of the Treasury, the American Indian Higher Education Consortium, and the National Endowment for Financial Education also shared information related to financial literacy. April 21, as part of the HUD Neighborhood Networks' Federal Resources Roundtable, provided information on financial aid available to help students pay for postsecondary education and encouraged Neighborhood Networks' center Directors to utilize their centers as financial aid information/assistance distribution points. April 22, exhibited materials at the San Diego National Association of College Admissions Counseling (NACAC) college fair. April 23 and 24 in Albuquerque, FSA staff from Headquarters and the Denver and Dallas regions distributed materials at Gathering of Nations, the largest powwow (Native American gathering) in the United States; also spoke to approximately 1000 people and shared additional materials with other informational vendors including the Bureau of Indian Affairs Office of Indian Education Programs as well as the American Indian Graduate Center. FSA staff also visited the Higher Education Department at the Isleta Pueblo (reservation) south of Albuquerque; provided 1500 brochures and bookmarks for Isleta students. April 24, presented financial aid information during two sessions focused on college access and financing at the 6th Feria Educative at the University of Texas (UTEP) in El Paso, Texas. April 28, exhibited materials at the Los Angeles NACAC college fair.	100%	Complete	
			1.2	Publish accurate and timely information that meets the needs of our audience.				
				5/14/2004	Although we are showing only incremental increases in the percent complete, we are okay. Development and clearance is a June/July activity with printing in September.	13 %	Green	

Milestone# Action Item

Status Date Comments %Complete Status

4/30/2004 Continuing work on the development schedule for the 2005-06 versions of our publications (including The Student Guide, Funding Your Education, and the High School Counselor's Handbook. The schedule will depend on the results of usability studies that we are preparing to conduct. Have forwarded request for approval for 05-06 quantities and costs for the Guide and Funding. This must be approved and forwarded to Communications before a GPO jacket can be opened so that design work can begin. Approval is needed as soon as possible. 12 % Green

1.3 Disseminate information directly to target audience.

5/14/2004 Student Aid Awareness (SAA) disseminates information directly to target audiences through partnerships, training, college fairs, financial aid nights and other activities. As of 5/12/04, SAA has provided federal student aid information and distributed materials to approximately 73,809 persons as follows: 69 % Green
 April 28, 2004 Los Angeles College Fair 3,000
 May 1, 2004 Rollingcrest Community Center 25
 May 2, 2004 Nashville, TN College Fair 750
 May 5-6, 2004 Edison, NJ College Fair 4,000
 May 7-9, 2004 NACCP 500

4/30/2004 Student Aid Awareness (SAA) disseminates information directly to target audiences through partnerships, training, college fairs, financial aid nights and other activities. As of 4/28/04, SAA has provided federal student aid information and distributed materials to approximately 65,034 persons as follows: 61 % Green
 April 15-17, 2004 WKU-TRIO Training 50
 April 19, 2004 MEAEOPP Conference 15
 April 21, 2004 HUD NN Reg Tech Asst Wkshp 150
 April 22, 2004 San Diego College Fair 1,500
 April 23-24, 2004 Gathering of Nations 1,500
 April 24, 2004 6th Feria Education 150

1.4 Respond accurately and timely to requests.

5/14/2004 For the period 4/26/04 –5/7/04, the Editorial Services Contract responded to the following correspondence: 154 controls--- (60 prior period)-----turnaround (3 days)=100% 1,704 non-controls--- (2,463 prior period) —turnaround (2 days)=99% 2,101 e-mails--- (2,066 prior period)-----turnaround (2 days)=100 99 % Green

4/30/2004 For the period 3/29/04 –4/9/04, the Editorial Services Contract responded to the following correspondence: 99 % Green
 60 controls--- (97 prior period)-----turnaround (3 days)=100%
 2,463 non-controls--- (6,600 prior period) —turnaround (2 days)=76%
 2,066 e-mails--- (2,413 prior period)-----turnaround (2 days)=100%

* The temporary anomaly that more than quadrupled the non-control mail received at ESC over the past few months will soon cease. The priority service given to control mail and emails has steadily been maintained.

1.5 Reach customers through Student Aid on the Web.

Status Date	Comments	%Complete	Status
5/14/2004	Student Aid Awareness uses the WebTrends program to record the use of our website Student Aid on the Web (SAOTW). The number of visits and hits are the key indicators of the use of SAOTW. The number of visits and hits for this reporting period (04-24- to 05-08-04) are 767,303 and 12,830,138 respectively. During the same period last fiscal year we had 225,825 visits and 7,230,589 hits. This represents FY04 increases of 239.8% for visits and 77.4% for hits over FY03. MyFSA, the Student Aid on the Web feature that allows students and parents to establish their own personal password protected accounts for use as they move through the financial aid life cycle has recorded 31,954 new accounts since SAOTW went live September 7, 2003. Information entered in their personal profiles can be saved and used to electronically pre-populate much of the FAFSA application and make application for admission to college. The MyFSA feature has only been available since September of 2003.	100%	Complete
4/30/2004	Student Aid Awareness uses the WebTrends program to record the use of our web site Student Aid on the Web (SAOTW). The number of visits and hits are the key indicators of the use of SAOTW. The number of visits and hits for this reporting period (04-11-04 to 04-24-04) are 809,404 and 13,901,491 respectively. During the same period last fiscal year we had 228,930 visits and 7,646,159 hits. This represents increases of 253.5% for visits and 81.8% for hits over FY03. MyFSA, the Student Aid on the Web feature that allows students and parents to establish their own personal password protected accounts for use as they move through the financial aid life cycle has recorded 30,256 new accounts for the FY04 year to date. Information entered in their personal profiles can be saved and used to electronically pre-populate much of the FAFSA application and make application for admission to college. The MyFSA feature was not available last fiscal year.	100%	Complete

2 ADS Improve customer interaction through customer feedback particularly at the Customer Service Call Center (CSCC).

2.1 Monitor customer feedback to improve services.

5/14/2004	<p>Progress continues as follows:</p> <p>New IFAP Search Engine - FSA OCIO is in the process of collecting data via a Google Search Questionnaire in order to support ITA along with our application team and to understand migration scope.</p> <p>EZ Audit - CSCC staff attended training offered by the EZ Audit staff on Thursday, 5/13/2004. We expect to reroute many EZ Audit calls to the CSCC team around 6/1/2004.</p> <p>FSA's IFAP Subscription Service - As of the end of April 2004, our membership was 4,918 members, which is 198 additional subscribers or a 4% increase since last month. This is an 18.5% increase since the beginning of FY 04.</p>	62 %	Green
4/30/2004	<p>Progress continues as follows:</p> <p>New IFAP Search Engine - The Google development box has been installed and is ready for testing. Implementation is scheduled for the summer.</p> <p>EZ Audit - Training started this week. CSCC staff will shadow EZ Audit staff after the training is complete, prior to forwarding all EZ Audit calls to CSCC.</p> <p>FSA's IFAP Subscription Update - An announcement was posted to the COD website as a reminder for financial aid professionals to sign up for FSA's free subscription service in order to receive emails about new guidance posted to the IFAP website. These emails will help keep the financial aid community up to date on the latest information provided by FSA without spending needless time surfing around for new publications and documents.</p>	58 %	Green

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5	ADS	Process Pell and Direct Loan transactions through the Common Origination & Disbursement (COD) system.						
			5.2	Issue COD SOO.				
					5/14/2004	FEBI Phase 1 downselect decision was made on 5/6/2004. Due diligence with the two downselect offers is taking place from 5/11/2004 - 5/18/2004. A draft FEBI Phase 2 RFP was released on Wednesday, 5/12/2004. Proposals are due by 7/6/2004.	83 %	Green
					4/30/2004	On track for FEBI Phase 1 downselect decision by 5/6/2004.	78 %	Green
6	ADS	Administer Campus-Based (eCB) activities.						
			6.5	Issue FISAP software release.				
					5/14/2004	Final FISAP software testing is scheduled for first and second weeks in June 2004. Release of software to schools is still planned for week of 6/21/2004.	83 %	Green
					4/30/2004	Still on track to release FISAP software week of 6/21/2004.	78 %	Green
8	ADS	Expand eZAudit initiative.						
			8.1	Be Prepared for Contract Award.				
					5/14/2004	Refresher training was held for staff on 5-11-04. Staff will train their teams on the new enhancements.	60 %	Green
					4/30/2004	On track for May 23 enhancement.	55 %	Green
			8.2	Complete first full cycle of processing (all school types).				
					5/14/2004	As of 5-10-04, 1,414 annual audit submissions have been rec'd, of which 893 have passed the QC screening. We are adding add'l staff to conduct QC screening to reduce the backlog.	40 %	Yellow
					4/30/2004	1,249 annual submissions have been received. We are continuing to conduct QC reviews to reduce backlog.	35 %	Yellow
			8.3	Improve audit review component of our compliance activities by increasing the e-submission rate to 95%.				

5/14/2004	As of 5-10-04, 2,767 schools have registered, about 58% of all schools.	58 %	Green
4/30/2004	2714 schools have registered to date, about 57% of all schools.	57 %	Green

9 ADS Enhance program monitoring and oversight.

9.1 Meet or exceed audit resolution rate of 95% by the end of the fiscal year.

5/14/2004	For the biweekly period 4-26-04 to 5-09-04, 95% of the audits were resolved on time. Cumulative since 10-01-03, 95% of the audits were resolved on time. We are continuing to monitor this closely, as we are expecting a large volume of audits in May.	55 %	Green
4/30/2004	For the biweekly period 4-12-04 to 4-25-04, 95% of the audits were resolved on time. Cumulative since 10-01-03, 95% of the audits were resolved on time. We are continuing to monitor this closely, as we are expecting a large volume of audits in May.	53 %	Green

9.2 Continue to measure school monitoring to assess overall compliance trends.

5/14/2004	Training was conducted 5-13-04 for one of our special projects: to call/email approximately 2,000 main campuses and additional locations that do not yet have the required NSLDS transfer student monitoring profiles. Trainers will then train their Team mates and the project will be underway.	55 %	Green
5/14/2004	Workgroup held kick off 5-6-04 to begin developing materials in preparation for Case Team training in July on reviewing potential areas of compliance. Project to contact schools re: NSLDS transfer student monitoring is on track.	53 %	Green
4/30/2004	For the first 2 qrts of FY 04, SEC conducted a comprehensive review of 1,641 unduplicated schools, or 27% of the total population, covering 28% of Title IV funding. An add'l 92 schools received an on-site program review and 50 schools received an on-site technical assistance visit. Trainers have been identified for one of our special projects: to call/email approximately 2,000 main campuses and additional locations that do not yet have the required NSLDS transfer student monitoring profiles. Draft training materials have also been developed and the training of case team trainers will be scheduled in the next few weeks. The Administrative Actions & Appeals Division has received 29 referrals for administrative action and initiated 13 debarments from 10-01-03 through 4-26-04.	50 %	Green

9.3 Conduct School Relations initiatives.

5/14/2004 - 85% of the Annual Report on the White House initiative on HBCUs has been completed. Project completion projected to mid June. 77 % Green
 - HBCU, Tribally-controlled colleges, and Hispanic serving institutions mailing list in development. The purpose of this mailing list is to quickly inform the insitutions presidents, business officers administrators, and financial aid administrators of department issues as well as receive timely community feedback and inquiries. The timeframe for the completion of this project is in early June.

5/3/2004 One hundred Sixty-five (165) Institutions that have been identified from the 6/30/2002 FISAP with Excess Liquid Capital (ELC) in their Perkins Loan fund accounts that total \$31,578,000. ELC is defined as the amount of cash on hand in the Perkins Loan fund that is in excess of apparent need. To date, 117 Schools of the original 165 Schools have responded with commitments to raise their average level of Expenditures in the amount of \$24,251,000. This commitment will increase the amount of available funds for needy students to continue their Postsecondary education. In addition, 22 Schools have returned \$2,460,065 to the US Treasury. 75 % Green

9.4 Conduct the Experimental Sites initiative.

5/13/2004 No major developments since the last update. Work continues on schedule. 70 % Green

4/30/2004 Experimental Sites staff provided the annual data submitted by schools conducting experiments to the Performance Analysis (PA) unit. Staff subsequently met on April 21 to discuss a proposed schedule for their in-house analysis of this annual performance data, and responded to several questions. PA staff has begun analyzing the data, with an expected delivery date for the draft 2002-03 report of June 30, 2004. 70 % Green

9.5 Administer the Quality Assurance program.

5/13/2004 No major developments since the last update. Work continues on schedule. 70 % Green

4/30/2004 QA Program staff participated in a design walkthrough of Phase I of the ISIR Analysis Tool on April 22. Pearson Government Solutions conducted the session via videoconference. This walkthrough provided FSA staff the opportunity to view each component of the new Phase I web product and new functionality that included the home page, data request from the ISIR Datamart, uploading of data, export, and data validation. Phase I development is on schedule and QA Program Staff will participate in acceptance testing June 2-11, 2004. 70 % Green

9.6 Conduct vulnerability assessment.

5/14/2004 Project leader is being briefed on work that teams will complete. 25 % Green

4/30/2004 Continue to be prepared for May 2004 kick off for studies. 20 % Green

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>	<i>Milestone#</i>	<i>Action Item</i>	<i>Status Date</i>	<i>Comments</i>	<i>%Complete</i>	<i>Status</i>
10	ADS	Produce school publications and materials.						
			10.1	Annually update and disseminate the Federal Student Aid Handbook.				
					5/13/2004	There has been no current change in the status of this project. Volume one of the multivolume handbook has been posted. This is just a clarification from last week. The reason it is yellow even though it has a September timeframe is because the individual timeframe markers are starting to be missed. They are hitting bottlenecks with some of the approval processes OPA (proofreading), OPE (content /policy checks), and FSA (content check). The comments have been given out on the drafts that were submitted but they were held onto for two months putting the rest of the project behind. Again, it is yellow because the individual markers within the milestone are not being met.	60 %	Yellow
					4/30/2004	Volume one of the handbook has been posted. The rest of the project remains the same as the last reporting cycle.	60 %	Yellow
			10.2	Update and disseminate Direct Loan Program publications such as the Entrance and Exit Counseling Guides and promissory notes.				
					5/14/2004	The Entrance Counseling Guides are in stock and orders are being filled appropriately. The Basics brochures are still in development. The content has been agreed upon, and the brochures are now being "designed." Currently, there are 28 back-ordered requests for publications or documents at the warehouse. All of these are for the Direct Loan PLUS Basics brochure and will be filled when the new brochure is finished. Schools have been informed about the out of stock item in the COD Processing Updates and other communications.	62 %	Green
					4/30/2004	The Entrance Counseling Guides are to be delivered to the warehouse on 4/30/2004. We have notified schools that we will begin shipping orders on 5/3/2004. Review and revision work continues on the Direct Loan Basics and Direct Loan PLUS Basics brochures, and we are on track for printing by the middle of June 2004. Currently, there are 17 back-ordered requests for publications or documents at the warehouse. All of these are for the Direct Loan PLUS Basics brochure (see above).	58 %	Green
13	BS	Enhance program monitoring and oversight.						
			13.1	Default Recovery Rate on FSA-held portfolio 9.5% or more by the end of the fiscal year.				
					5/12/2004	Total non-consolidation loan recoveries were \$ 983.6 million, an increase of 28 percent over the same period, May 7, 2003, last year. This represents 6.18 percent of the FY04 portfolio balance.	60 %	Green

	4/30/2004	Total non-consolidation loan recoveries were \$865 million, an increase of 27 percent over the same period, April 25, 2003, last year. This represents 5.12 percent of the FY04 portfolio balance.	60 %	Green
13.2	Update FSA-wide risk management and default prevention inventory.			
	5/12/2004	The Default Management Work Group has identified gaps in the Default Management Inventory related to the Perkins past due defaulted loan portfolio. The Group is working with policy, ASED and schools to establish a threshold for transferring specific defaulted Perkins loans from schools to the Department. The Direct Loan Late Stage Delinquency Program (LSDP) staff is working with ACS on a new initiative to monitor the success of the LSDP as one of the new default prevention measures. The Lifetime Default Rate (LTDR) will also be a new measure that FSA might use for default prevention.	40 %	Green
	4/28/2004	A meeting of the Default Management Workgroup was held on April 23. Updates were provided. Meetings will be scheduled for each month and the initial inventory will be updated.	30 %	Green
13.3	Complete the work on the implementation of the life-time default rate measure.			
	5/12/2004	Because of the low loan volume during the first two years of the Direct Loan Program (1994 and 1995), a decision was made to focus analysis on the 1996-1999 cohort years. School type, state of residency of the borrower, average loan size, type of loan, etc will be reviewed. Analysis has begun on 1997, 1998, 1999 cohort.	60 %	Green
	4/28/2004	Years 1994, 1995, 1996 for summary Lifetime Default Rate (LTDR) were updated as March 31, 2004. The data is also detailed by school type. Results were presented to the Management Council on April 23 and well received. Analysis has begun on 1997 and 1998. Further analysis of 1994,1995,and 1996 will include state of residency of the borrower, average loan size, type of loan, etc.	50 %	Green
13.4	Identify new and enhance current delinquency/default prevention tools for the Direct Loan Program.			
	5/12/2004	The success measure for this item is to increase the cure rate on 181-360 day delinquent loans in the non-consolidation Direct Loan portfolio by 1 percent over the FY2003 baseline by September 2004. The goal was achieved in January 2004 and has continued thru the month of April. The goal for FY2004 is 55.1 percent. The actual rate for April 2004 was 59.1 percent, an increase of 4 percent. Direct Loan Servicing staff will continue to work with schools to main the goal each month thru September 30, 2004.	50 %	Green
	4/28/2004	The cure rate for delinquent loans is reported monthly. The next report will be submitted in mid May.	50 %	Green
13.5	Conduct vulnerability assessment.			

5/12/2004	The independent Verification and Validation (IV&V) contract has been awarded. One of the first deliverables under the contract will be to develop a project plan that will detail the processes that will be reviewed through the end of FY 2004. Once the project plan is delivered, this action item will be closed.	75 %	Green
4/29/2004	The Department is currently reviewing updates to the security plan and security procedures. The review will continue throughout the next month. Implementation of the changes recommended in the GAO Audit as well as the FISMA Audit will conclude this task. Those changes will be tracked over the next 3 months thru completion.	60 %	Green

16 FPS Perform National Student Loan Data System (NSLDS) maintenance and operations activities.

16.1 Perform cohort default rate calculations, send, and post.

5/14/2004	The next rate calculation is scheduled for Saturday, 7.31.2004, for the official cohort default rates.	50 %	Green
4/30/2004	The next rate calculation is scheduled for Saturday, 7.31.2004, for the official cohort default rates.	50 %	Green

16.2 Prepare guaranty agency fee calculations and send. Review Forms 2000 reasonability data against summarized NSLDS data.

5/14/2004	The next LPIF calculation is scheduled for Saturday, 5.15.2004.	45 %	Green
4/30/2004	The next LPIF calculation is scheduled for Saturday, 5.15.2004.	45 %	Green

16.3 Review, evaluate, and prepare guaranty agency NSLDS data integrity improvements reports and benchmarks.

5/14/2004	The April benchmark reports were reviewed and distributed. The edit passage rates for the Guaranty agencies fell slightly to a 97.06% passage rate.	60 %	Green
4/30/2004	The March benchmark reports were reviewed and distributed. The edit passage rates for the Guaranty agencies remain high, with a 99.06% passage rate.	50 %	Green

16.6 Provide monitoring functionality of GA and lender reasonability on a monthly basis.

5/14/2004	NSLDS presented its business case to the DSG on Thursday, 5.6.2004 and will be presenting to the IPC on Friday, 5.14.2004.	52 %	Green
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					4/30/2004	NSLDS is drafting a business case to obtain funding for this work. The contractor is aware of the requirement and is prepared to perform the work once issued.	50 %	Green
19	FPS	<i>Perform maintenance and operations activities for the Financial Partners Data Mart.</i>						
		19.1	Provide a quarterly status report on ways to improve effectiveness and efficiency of Data Mart review process.					
					5/14/2004	Two of the outstanding lender scorecard issues have been tested/validated.	60 %	Green
					4/30/2004	The contractor has made all changes that were identified to the GA and lender scorecard. FP users will test/validate the changes within the next three weeks.	55 %	Green
		19.2	Quarterly evaluation of use and value added to the guaranty agency and lender review processes.					
					5/14/2004	The correction for the GA scorecard deficiency has been deployed.	60 %	Green
					4/30/2004	The Contractor has corrected the deficiencies that were identified in last weeks meeting.	50 %	Green
		19.3	Monitor Data Mart feeds in order to provide accurate, concise and timely data to users.					
					5/14/2004	The QC report for PEPS, NSLDS and LaRs has been developed. Reports submitted with this update.	70 %	Green
					4/30/2004	Continue gathering data to determine what fields will be used to QC data received from PEPS, NSLDS and LaRS systems. Monthly QC report for April will be submitted the week of 5.3.2004.	60 %	Green
20	FPS	<i>Perform Financial Partners Portal operations activities.</i>						
		20.1	Monitor and evaluate web page hits to drive future postings to portal.					
					5/14/2004	The team has completed data gathering from the April submissions. April results submitted with this update.	65 %	Green
					4/30/2004	The Portal team is continuing to gather data from the April submission. The April report will be submitted with the next update.	60 %	Green
		20.2	Maintain current and relevant information to financial partners' user community.					

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					5/14/2004	The next update for the Financial Partners User Community members will be scheduled in FY05. Will continue to monitor and provide monthly summary reports of information.	80 %	Green
					4/30/2004	Deployment of the Financial Partners User Community updates has been completed. The deployment was successful.	80 %	Green
			20.3	Obtain/evaluate feedback from financial partners' user community on value of information posted on the Financial Partners Portal.				
					5/14/2004	All outstanding issues/concerns received from the Focus Group meeting have been addressed or posted. The team will continue to monitor the Portal mailbox for any new issues or concerns.	80 %	Green
					4/30/2004	The team developed/completed several of the items listed on the Action Plan (ex: add data strategy information, post special allowance rates). Focus Group Action Plan submitted.	70 %	Green
21	FPS	<i>Perform Leveraging Educational Assistance Partnership/ Special Leveraging Educational Assistance Partnership (LEAP/SLEAP) activities.</i>						
			21.2	Prepare and submit clearance paperwork.				
					5/14/2004	Completed.	100%	Complete
					4/30/2004	The Application to Participate in the LEAP and SLEAP Programs was approved on Monday, 4.19.2004.	100%	Green
			21.3	Review and approve applications from states. Obligate, generate, and mail grant award notifications to states.				
					5/14/2004	Thus far, ten of 56 possible entities have applied for 2004-2005 award year funding. The closing date by which all states shall apply is Friday, 5.28.2004. Previous experience is that the majority of the entities do not submit their application until the actual due date with the heaviest volume the week before and after. Because this is a formula grant program, any requests for an extension to the deadline will be considered on a case-by-case basis. Initial reviews of applications submitted, thus far, are being conducted.	38 %	Green
					4/30/2004	The official Deadline Date Notice was published in the Federal Register on Wednesday, 4.21.2004. Thus far, seven of 56 possible entities have applied for 2004-2005 award year funding. The closing date by which all states shall apply is Friday, 5.28.2004.	37 %	Green
22	FPS	<i>Perform Voluntary Flexible Agreement (VFA) activities.</i>						
			22.1	Perform cost neutrality analysis and provide results.				

5/14/2004 Cost Neutrality Analysis and Recommendations were reviewed with Terri Shaw on Tuesday, 5.4.2004. A review of the results is planned with Sally Stroup prior to discussing next steps and before contacting the VFA GA's regarding the results. 100% Green

4/30/2004 Cost Neutrality Analysis and Recommendations will be complete by Friday, 4.30.2004 and a meeting is tentatively schedule for early in the week of May 3rd to present the results to Terri Shaw. 97 % Green

22.2 Prepare performance measure assessment and benchmarking reports.

5/14/2004 Recommendations for VFA benchmarks were included in the recommendations of the Cost Neutrality Analysis (Project 22.1). Three non-VFA guarantors have volunteered to provide default aversion assistance request information for use as a benchmark against VFA performance. 83 % Green

4/30/2004 Proposed benchmarks were shared with the Default Management workgroup on Friday, 4.23.2004. They will be included in the Cost Neutrality Analysis presentation to Terri Shaw as part of the overall recommendations resulting from the Cost Neutrality Analysis effort. The remainder of this initiative will include coordinating the receipt of data not available to ED on a monthly basis from the VFAs and a sample set of non-VFAs, piloting the reporting of the information beginning 6.1.2004, and formal reporting beginning 10.1.2004. 80 % Green

22.3 Evaluate new applications for VFA.

5/14/2004 The draft process has been updated to reflect the "transmittal to Congress" phase required by legislation. The phase requires full sign off through the Department's Executive Secretary process, as well as a number of sign off steps within FSA. 88 % Green

4/30/2004 The draft process was updated over the past two weeks to include the correct sequence of events between internal review of a proposal by other ED organizations and posting the agreement for industry comments. Over the next two weeks, the actual steps necessary to deliver the agreement to Congress for the mandated 30-day review period will be captured. The initial steps of the process (and associated timeframes) will be tested with a new VFA proposal that will enter the process next week. 85 % Green

22.4 Foster effective working relations with guaranty agencies during scheduled site visits.

5/14/2004 Financial Partner Services has been invited to participate in the next VFA Information Sharing session scheduled for June 7-9, 2004 in Sacramento CA. FP is evaluating the feasibility of attending. 70 % Green

4/30/2004 Outreach activities over the past two weeks have included the continued negotiations with Colorado to incorporate changes into their proposed VFA agreement in order to finalize it for review by Congress, a meeting with EdFund to discuss the State's proposal to use Operating Fund money for State expenditures, discussions with the National Student Loan Program (NSLP) to discuss a potential VFA, and a United Student Aid Funds (USAF) demonstration of the Life Skills product that mirror existing VFA initiatives. 67 % Green

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23	FPS	Perform maintenance and improvements to the Financial Partners' Electronic Records Management (ERM) system in order to enhance use.						
		23.1	As appropriate integrate ERM work with other FSA business units. Identify opportunities to integrate at the enterprise level.					
				5/14/2004	FP and SEC approved the project plan for the Web server change on Wednesday, 5.5.2004.		70 %	Green
				4/30/2004	FP and SEC met to with ERM contractor to discuss draft project plan for Web server changes. Revisions were provided and a new proposal was forwarded to FP and SEC for review on Wednesday, 4.28.2004.		55 %	Green
		23.2	Analyze and evaluate the current use of the Electronic Records Management system within Financial Partners to identify improvements that would raise the effectiveness and efficiency of the system.					
				5/14/2004	Staff will include the Web server change in the FP ERM plan.		60 %	Green
				4/30/2004	Staff is updating the FP ERM plan to include possible system enhancements (if approved).		50 %	Green
25	FPS	Enhance program monitoring and oversight.						
		25.1	Participate and provide Financial Partners Channel support for ED audit.					
				5/14/2004	Ernst & Young (E&Y) has selected five GAs to visit as part of the ED audit. FP has contacted all of the CFOs selected for the E&Y audit. Narratives on collections, subrogation and claims have been requested and received, except for Vermont. Requirements of GA population download (data call) for audit sample have been communicated to GAs. Illinois GA has submitted all of the downloads, and E&Y is preparing the sample for the site visit on Monday, 5.10.2004.		35 %	Green
				4/30/2004	Ernst & Young (E&Y) has selected five GAs to visit as part of the ED audit. FP has contacted all of the CFOs selected for the E&Y audit. Narratives on collections, subrogation and claims have been requested. Requirements of GA population download (data call) for audit sample have been communicated to GAs.		30 %	Green
		25.2	Prepare and conduct program reviews of guaranty agency and lenders/servicers. Use results to determine technical assistance, future monitoring and oversight needs. Coordinate the interpretation of the code of Federal regulations with all elements of the Department of Education that include legal, policy, CFO, general managers and COO in performing our reviews and assessing liabilities.					
				5/14/2004	During this reporting period FP Services Review Teams conducted a program review at ASA and participated in the 2nd CRI pilot review at the loan servicer MOHELA.		45 %	Green
				4/30/2004	During this reporting period FP Services Review Teams completed program reviews of two guaranty agencies; ECMC and Louisiana.		40 %	Green

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25.3		Analyze and collect third-party audit findings. Use results to determine technical assistance, future monitoring and oversight needs. Utilize PEPS to integrate findings.						
			5/14/2004	Staff continuing to follow-up with lenders who have not submitted FY02 lender audit reports. Staff is also continuing to review A-133 GA compliance audits.			85 %	Green
			4/30/2004	Follow-up with lenders is still in process concerning lender audits. During the week of April 26th, 26 lenders called requesting assistance.			80 %	Green
25.4		Utilize GA/lender scorecards to reduce risk and improve review process. Review and evaluate use of guaranty agency and lender scorecards.						
			5/14/2004	HQs and Regional staff are still working on calculations for both the GA and Lender scorecards. The area of attention for the lender scorecard is focused on SI #3 Change in Default Claim Rate, SI #4 Delinquency rate, SI #5 Change in Delinquency rate, and SI #14 Program Review Results. These should be completed in the coming weeks.			64 %	Green
			4/30/2004	Meeting held last week regarding GA and Lender scorecards among the regions and headquarters. From that meeting one GA formula needs to be tested and approved. The SIR# is 555. On the lender scorecard four SIR's need to be tested and approved. The regions are being requested to select areas that they would take responsibility for in correcting the formulas.			60 %	Green
25.6		Conduct vulnerability assessment.						
			5/14/2004	NSLDS presented its business case to the DSG on Thursday, 5.6.2004 and will be presenting to the IPC on Friday, 5.14.2004.			08 %	Green
			4/30/2004	NSLDS is drafting a business case to obtain funding for this work. The contractor is aware of the requirement and is prepared to perform the work once issued.			06 %	Green
37	CIO	Support ED, customers and business partners by participating in the President's Management Agenda E-Government initiatives.						
			37.1	Release GovLoans Gateway, a plain speak web site that educates citizens with links to federal agency and private-sector resources.				
			5/14/2004	No Change.			83 %	Green
			5/7/2004	Congressman Adam Putnam, Chair of the House Technology, Information Policy, Intergovernmental Relations, and Census Subcommittee presented a Congressional Resolution - complimenting the Department of Education on collaborating to improve service to the American public - at the official GovLoans.gov launch on Thursday, April 29, in conjunction with the GovBenefits second anniversary event.			70 %	Green

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					4/30/2004	GovLoans.gov was officially launched on Thursday, April 29, in conjunction with the GovBenefits second anniversary event. Congressman Adam Putnam (R, FL) presented a copy of a Congressional Resolution to GovBenefits and GovLoans recognizing the success of both of these E-Gov initiatives, and the innovative collaboration between the GovLoans partner agencies and GovBenefits that created GovLoans.	70 %	Green
					4/29/2004	On April 16 and 19, the GovLoans Working Group completed User Acceptance Testing of the new GovLoans site on the staging server, and provided the findings to the development team. The team is still on schedule to launch GovLoans to the public (as an integrated part of GovBenefits) on April 29.	54 %	Green
45	EPMS	<i>Mature Enterprise-wide Procurement Plan.</i>						
			45.1	Complete market research to resolve plan issues.				
					5/14/2004	Concern remains regarding availability of resources to accomplish VDC research. APFP management attention is focused squarely on making FEBI a success within the planned schedule. Will commence with concentrated effort once final FEBI RFP is issued.	70 %	Yellow
					4/30/2004	FEBI and Integration market research are complete. The initial phase of data strategy market research is also complete. The SAIG market research is scheduled to be completed by the end of March. However, while the preliminary research has been accomplished, the main thrust of the VDC market research will not start until the end of April 2004 due to nonavailability of resources. The internal objective to have this completed by April 1, 2004 was not accomplished, so the status of milestone 45.1 is changed from green to yellow. The objective to complete milestone 45.1 is still on schedule for September 30, 2004.	70 %	Yellow
			45.2	Synch Plan w/BIG End State Vision.				
					5/14/2004	Will have an updated Procurement Plan next week. (Will not include VDC.)	50 %	Green
					4/30/2004	After market research is complete, decisions on procurement execution will be incorporated in the plan.	50 %	Green
47	EPMS	<i>Implement enterprise contract performance monitoring measures against new systems contract awards.</i>						
			47.1	Incorporate CSB into enterprise process.				
					5/14/2004	"Proof of Concept" training has been defined and reviewed. A training session with CSB personnel must occur to complete this milestone. The status is "Yellow", since it will not be accomplished by April 30, 2004. The completion date needs to be rescheduled for September 30, 2004.	90 %	Yellow

4/30/2004 Model process has been established. Contractor support has been engaged to do a "Proof of Concept" with CSB to initiate the process by April 30, 2004. Significant progress has been made since the last report, and we have scheduled "Proof of Concept" meetings with CSB personnel. An initial meeting has been held, but a series of meetings, some already scheduled for May 2004, must occur to accomplish this milestone. The status is "Red", since it will not be accomplished by April 30, 2004. 75 % Red

47.2 Incorporation of FEBI into process by September 30, 2004.

5/14/2004 The progress and status will remain at yellow until FEBI has reached a point that permits incorporation into the process. 40 % Yellow

4/30/2004 The Front End Business Initiative (FEBI) is still in the early stages of acquisition. By September 30, 2004, the process will incorporate FEBI to the stage that FEBI has achieved on that date. Discussions have begun with FEBI to determine the best way to implement performance measurement and management on FEBI. An initial meeting with FEBI staff has occurred. The status will remain at yellow until more definitive work has been accomplished. 40 % Yellow

48 EPMS Continuously update and monitor procurement internal controls.

48.1 Establish monitoring and reporting process for government furnished property.

5/14/2004 Complete 100% Green

4/30/2004 A study completed in February 2004 confirms that a detailed monitoring and reporting process for government furnished property exist within ED and FSA. This completes this Action Item. 100% Green

48.2 Establish reporting process to monitor vendor performance.

5/14/2004 Contractor support is being initiated. Full implementation of the process and reporting vendor performance will extend beyond September 2004, as new acquisition initiatives such as IPM take flight. 40 % Yellow

4/30/2004 With the addition of a new FSA employee and Contractor support the plan for developing the enterprise vendor performance process, including performance reporting, has been outlined. A process can be established with that contractor support by September 30, 2004. Full implementation of the process and reporting vendor performance will extend beyond September 2004. 40 % Yellow

54 AWSS Deliver workforce development and support programs.

54.1 Continue Intern Program.

5/14/2004 As of today, we have 37 interns signed up and ready to go for this summer's program. We were shooting for 25-30 new interns + the ones continuing from the Fall and every spot has almost been filled for a total of (38). We had to turn down request about 6 request for interns from managers that submitted there request past the deadline. It is my hope that next year we'll be albe to accomodate even more managers and provide them with excellent help for the summer. Right now, we are getting the intern's cubes, phones and computers set up. We're also preparing orientation material and handling all the logistics involved with getting them ready to go. 1 manager will make her selection soon and then all 38 will be set.

54.2 Conduct FSA Orientation.

5/14/2004 The "Dry Run " for the June 2, 2004 FSA New Employee Orientation Program session was conducted on May 12, 2004. The first draft of the new FSA video is scheduled to be completed by May 21, 2004.

4/30/2004 Interviews for the FSA video were conducted on April 7, 2004. FSA employees were interviewed on floors 11, 10, 9, 8 and 7. The remaining interviews to be conducted will cover floors 7,6,5,4,3,and 2 . All FSA employee interviews for the video will be completed by April 22, 2004.

54.3 Implement results of One-ED Competitions.

5/3/2004 There has been no change to the status of the competitive sourcing initiative for HR/Training. It is anticipated that the outcome of the payment processing study will be announced sooner than HR/Training action. As the decision is announced, we will provide appropriate support to implement changes affecting FSA. The One ED strategic investment process is still in the early stages for IT processes is still underway with no indication of a need for support from FSA HR in the near future.

54.4 Update Skills Catalog/Learning Tracks.

5/14/2004 Team met with the Chief Information Officer group on May 12 and the Policy Liaison & Implementation Staff group on May 13 to finalize their sections of the Skills Catalog. We will brief Calvin on May 18 and further develop our communication strategy for roll-out tentively set for June 2004, in the coming weeks.

5/3/2004 Team members attended the "Employee Skills Inventory System" briefing to review the skills gap closure metrics tool available to ED employees. The team is currently scheduled to meet with Borrower Services on 4/30. We are scheduling meetings with Title IV Delivery Division, CIO, and Policy Liaison & Implementation Staff to finalize those sections of the catalog. We are also designing and formatting the final copy for presentation to the Management Council in May.

54.5 Implement Workforce Alignment Strategy.

5/3/2004 We have completed assembling the information that was needed for our reorganization package and on April 26, 2004, Terri approved our proposal and the package was delivered to the Office of Management for formal clearance and approval. We anticipate that the package will remain in clearance until May 10, 2004, at which time we expect that it will be approved. We have continued to make progress on our request for authority to offer VERA/VSIP to ASEDS employees, by discussing the request with officials from OM. On April 29, 2004, our final draft request was submitted to OM for submission to OPM (in draft). We anticipate comments from OPM by May 7th at which time we will meet with OPM & OM to discuss or otherwise address their comments/concerns.

55 AWSS Perform facilities management activities.

55.3 Administer records management.

5/14/2004 No change in status. 90 % Green

5/3/2004 Currently 100% of FSA's organization has been interviewed. After each interview a Records Classification form is to be completed by each organization thus far, 95% of the reports have been submitted for review and approval by OCIO and NARA. 90 % Green

61 CIO Implement Enterprise Data Strategy initiatives.

61.7 Continue to build on Phase I by developing a detailed vision on FFEL/enrollment data flow, gaps/impact of Common Services for Borrowers (CSB), electronic Case Management and Oversight (eCMO), National Student Loan Data System (NSLDS), and electronic Campus-based systems.

5/14/2004 Conducted FFEL and Student Enrollment working sessions to work towards Target State recommendations. 46 % Green

5/7/2004 Conducted meetings with ED and the FFELP community to discuss issues and potential improvement areas for Student Enrollment Reporting and FFEL Reporting. Submitted deliverable 152.1.2 Data Strategy Target Vision CSB Impact Analysis to FSA on Friday, April 30th. 43 % Green

4/30/2004 Conducted FFEL and Student Enrollment working sessions to discuss the considerations, pros, and cons of potential Target State options. Incorporated FSA feedback into the CSB Impact Analysis Deliverable 152.1.2 for submission on 4/30/2004. 41 % Yellow

61.9 Develop the detail Data Quality Execution Plan.

5/14/2004 No change. 46 % Green

5/7/2004 Held Steering Committee meeting to prioritize data quality issues. 43 % Green

4/30/2004 Held Steering Committee meeting to finalize ranking criteria and start prioritizing data quality issues. 41 % Yellow

61.10 Develop a holistic XML Management Plan.

5/14/2004 Received the signed cover letter/Contracting Office approval for deliverable 152.1.7 XML Core Component Dictionary Release 2.0. 41 % Green

5/7/2004 Completed development of the 15 XML Registry logging and comments enhancements. 38 % Green

4/30/2004 Received approval from Holly Hyland on the XML Core Components Dictionary Release 2.0 (deliverable 152.1.7). We are awaiting formal approval from FSA contracts. 35 % Yellow

61.11 Implement the Standard Student Identification Methodology (SSIM), as defined by the FSA enterprise, as a pilot on renewal applicants.

5/14/2004 The Trading Partners met for the SSIM bi-monthly status meeting. The Development Team presented a review of their findings since the last status meeting. A discussion on change notifications and exception processing and the Development Team recommendations were also part of the presentation. Upcoming work includes finalizing analysis of the effectiveness of current SSIM algorithms for correction sources. Begin to modify the SSIM algorithms to implement findings, and provide possible solutions to exception conditions. Additionally, begin to analyze the change notification process, with emphasis on the volume of notifications that will be generated, and automation necessary to maintain current functionality. 50 % Green

62 BS Begin the implementation of Common Services for Borrowers (CSB).

62.2 Begin implementing Phase 1 of the FSA-approved transition plan.

5/12/2004 Contracts - Awaiting proposal from ACS regarding the request to rebaseline the CSB implementation scheduled. 35 % Green

Development - Preparation of the IT Investment Business case is underway. The new Spanish language loan consolidation web site is ready to move to systems acceptance testing. FSA communication will be alerted to ensure appropriate clearance within FSA/ED.

Infrastructure - FTS Telecommunication's facilities needed by CSB are behind schedule and could impact implementation. This issue is being escalated.

Operations - Nothing new to report.

Oversight - Item 13.5 (Vulnerability Assessment) of the annual plan also covers this issue. The Independent Verification and Validation (IV&V) task order has been issued and the IV&V contractor is working on staff recruitment efforts.

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>	<i>Milestone#</i>	<i>Action Item</i>	<i>Status Date</i>	<i>Comments</i>	<i>%Complete</i>	<i>Status</i>
					4/29/2004	<p>Contracts – FSA received a letter from ACS requesting a delay in implementation. The request is under review. ACS is currently validating and reviewing the project plan and schedule to determine appropriate revisions. ACS expects to deliver a revised schedule and project plan in May. The goal is to develop a realistic plan to complete the transition in the shortest and most efficient timeframe.</p> <p>Development – There is nothing significant new to report.</p> <p>Infrastructure – FSA has purchased the Commerce Quest Data Integrated System product and related licenses.</p> <p>Operations – Nothing new to report.</p> <p>Oversight – Nothing new to report.</p>	25 %	Green
63	ADS	Improve school partner oversight.						
			63.1	Implement Integrated Partner Management (IPM) system.				
					5/14/2004	See milestone 63.6 for details on IPMS competitive bid work that has been completed.	67 %	Green
					4/30/2004	See milestone 63.6 for details on IPMS competitive bid work that continues on track.	63 %	Green
			63.6	Select competitively a vendor to perform the conceptual design and development of the IPM system.				
					5/14/2004	The ILSC contract was awarded to Grant Thornton during the first week in May 2004.	67 %	Green
					4/30/2004	ILSC contract award continues on track for award by end of April 2004.	63 %	Green
			63.8	Procure the design of a workflow tool for SEC.				
					5/14/2004	Waiting on FEBI/Data Strategy final report to make final decision.	62 %	Green
					4/30/2004	Final report on FEBI and Data Strategy team work due by mid May 2004. Decision can be made after final report is issued.	58 %	Green
70	ADS	Increase Student Financial Aid program awareness.						
			70.1	Expand federal student aid awareness and outreach program.				

Milestone# Action Item

Status Date Comments %Complete Status

5/14/2004 This Milestone has been rolled into the Front End Business Integration (FEBI) Small Business Initiative. New Milestone to be developed. 25 % Green

4/30/2004 This Milestone has been rolled into the Front End Business Integration (FEBI) Small Business Initiative. New Milestone to be developed. 25 % Green

70.2 Develop and implement long-term mass marketing strategy.

5/14/2004 This Milestone has been rolled into the Front End Business Integration (FEBI) Small Business Initiative. New Milestone to be developed. 25 % Green

4/30/2004 This Milestone has been rolled into the Front End Business Integration (FEBI) Small Business Initiative. New Milestone to be developed. 25 % Green

71 ADS Reengineer EDEExpress.

71.3 Implement Return to Title IV Web Release.

5/14/2004 Completion of the System of Records Notice (SORN) continues through the clearance process with an anticipated completion in late August. A list of issues identified during Acceptance testing has been forwarded to the contractor, and a meeting has been set up for Monday, May 17th to review them with Pearson. These changes are recommended in order to achieve a more user-friendly product that accurately calculates and tracks the return of Title IV funds. An adjusted date will be provided in the near future once this discussion has taken place. This product is non-year specific and delaying the posting will not impact schools adversely. There is currently a PC product that is available. However, we would like to make the product available to the aid community as close to the start of the 04-05 academic year as possible. 95 % Yellow

4/30/2004 Completion of the System of Records Notice (SORN) continues through the clearance process with an anticipated completion in late July. Acceptance Testing for R2T4 on the web, release 1.0 and release 1.a have been tested and signed off by FSA. Based on regulatory guidance released by OPE on February 12, 2004, we have identified some key issues that we feel should be in the software so that schools are in compliance with the regulations. In addition, we are reviewing and requesting fixes of issues identified during Acceptance. These changes are necessary in order to achieve a useful and user-friendly product. This product is non-year specific and delaying the posting will not impact schools adversely. There is currently a PC product that is available. However, we would like to post the product before the 04-05 academic year begins in the fall of 2004. 95 % Yellow