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**Integration Partner Transition
*Integrated Partner Management
(IPM) Briefing***

May 2004

Project Overview

- IPM is envisioned as the solution that enables FSA to successfully and easily perform oversight, management and maintenance of its Trading Partners.
- IPM will integrate the processes and supporting systems related to the management of FSA trading partners (schools, lenders, GAs, servicers), to enhance oversight through integrated data for decision-making and enabling tools, provide partners a single point of entry to FSA systems and incorporate a new common identifier (RID).
- The solution will provide a holistic view of the information related to FSA Trading Partners and will enable FSA to overcome the current challenges of managing information related to Trading Partner identification and their interactions via a combination of Postsecondary Education Participants System (PEPS) and the Title IV delivery systems.

Project Overview - PEPS

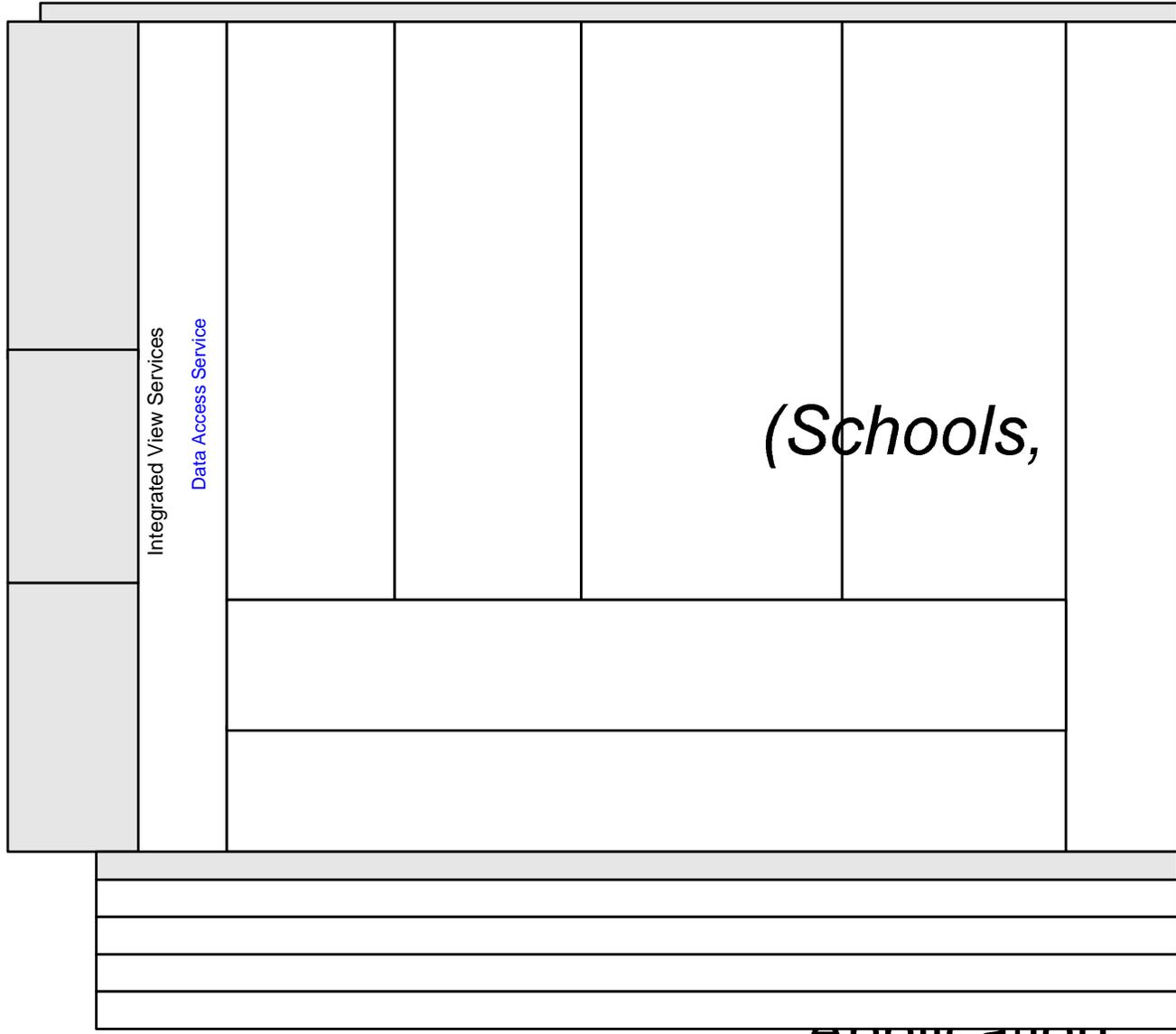
- PEPS is FSA's management information system of all organizations that have a role in administering student financial aid and other Higher Education Act programs. PEPS maintains eligibility, certification, demographic, financial, audit and default rate data about Schools, Lenders and Guarantors participating in the Title IV programs. PEPS is used by FSA, Office of Postsecondary Education (OPE), Office of Inspector General (OIG), General Accounting Office (GAO), Guarantors, State Departments of Education, Regional and National Accreditors, and State Licensing Agencies. In addition, PEPS is available to any other portion of the Department of Education.
- It is envisioned that the functionality in PEPS will be reengineered to serve as the foundation for the IPM solution.

Project Owners

- FSA Project Manager:
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Business Functions

- It is envisioned the solution will cover the following business areas:
 - Enrollment Management
 - Eligibility Management
 - School On-Going Oversight
 - Financial Partner On-Going Oversight
 - Enterprise Routing Identifier (RID) Services
 - Reporting and Auditing Services
 - Profile and Demographic Management
 - Access Management
 - Customer Support
 - Workflow Management



Integrated View Services

Data Access Service

(Schools, Guaranty Agen

Application
Interfaces



Relationship to FSA's Strategic Goals

Strategic Goal	Applicable to Project?	If yes, why?
Modernize & Integrate Systems	Yes	Will streamline existing legacy systems and provide updated architecture and alignment with Enterprise Target Vision.
Improve Program Integrity	Yes	Will improve FSA's ability to manage Trading Partners and allows for better informed and improved oversight.
Reduce Costs	No	N/A
Improve Products & Services	Yes	Will allow for a simplified, streamlined interface with FSA by Trading Partners.
Improve Human Capital	No	N/A

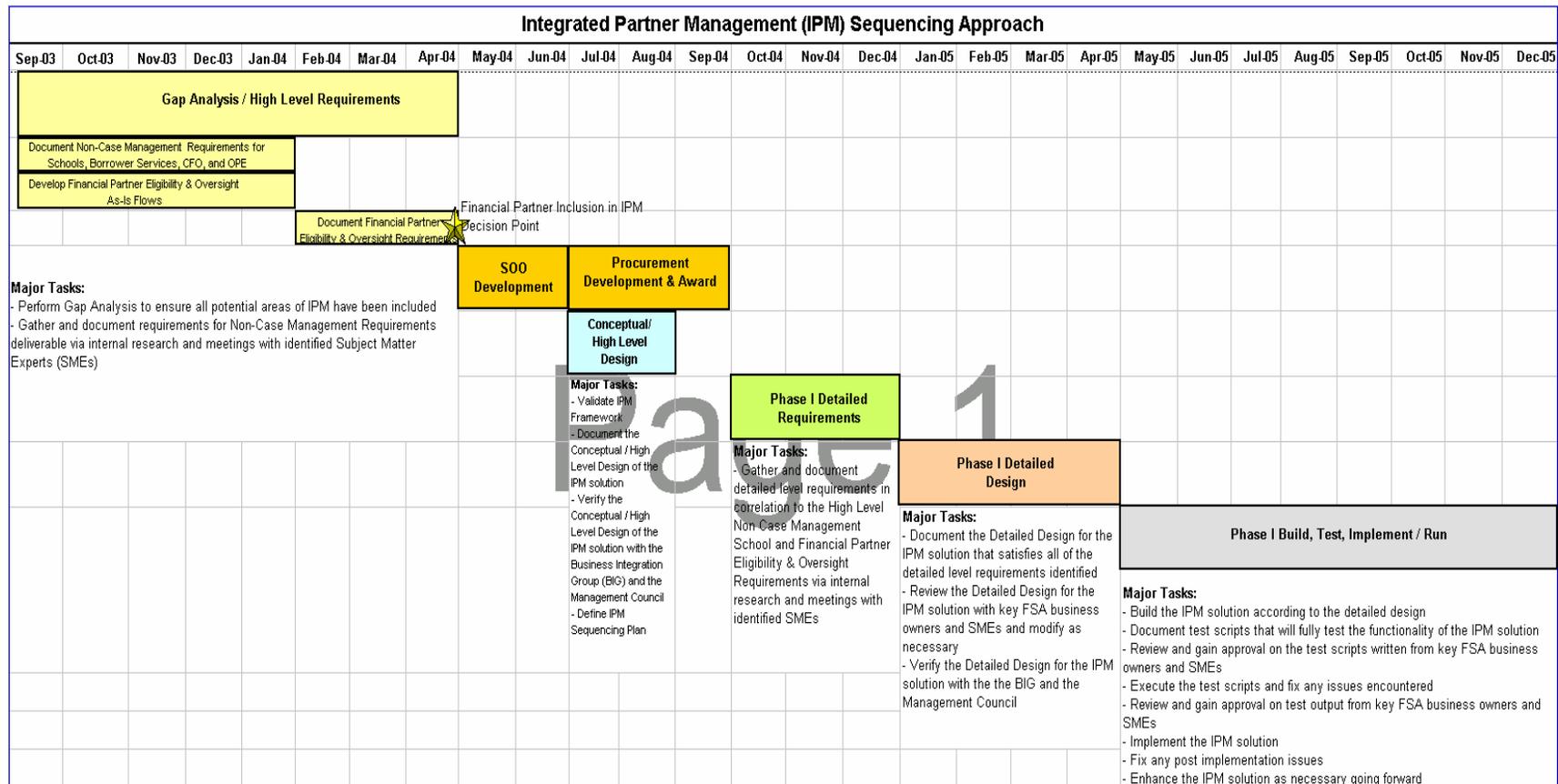
Relationship to FSA's 'Big Picture'

- Integrated Partner Management was defined as a business capability in the Enterprise Target State Vision, with the following high-level functional capabilities:
 - Application Process
 - Partner Enrollment
 - Partner Eligibility & Oversight
 - Relationship Management

Delivery Process

- The IPM related deliverables produced to date have been created with the help of various FSA and Trading Partner working sessions and focus groups.

Project Schedule



- The future phases of the IPM conceptual design and solution implementation are unfunded and to be determined.

Project Deliverables

- The following projects have been completed as part of IPM:
 - Routing ID (RID)
 - Enrollment & Access Management
 - Case Management & Oversight (eCMO)
 - IPM Gaps Analysis

Project Deliverables - RID

- The vision of the RID initiative is to provide a consistent manner in which to identify Trading Partners (i.e., Schools, Servicers, Lenders, Guaranty Agencies, State Agencies, etc.) across the enterprise, regardless of the system, and provide FSA a holistic view of Trading Partner interactions occurring within the FSA enterprise.
- The RID will be an eight-digit randomly generated unique number.
- The RID will be assigned to all Trading Partners directly interacting with FSA.
- The RID will initially be an internal number that will then be gradually rolled out to all Trading Partners where appropriate.

Work Completed to Date:

- RID Implementation Options Analysis was delivered on July 1, 2003
- RID High-Level Design was delivered on November 14, 2003

Project Deliverables – Enrollment & Access Management

- The vision of the Enrollment and Access Management initiative is to review and analyze FSA's current Enrollment and Access Management environment and look for ways to provide a single business process for schools, servicers, and third parties.
- A single business process will reduce any possible confusion among system-users relating to the hand-offs between Enrollment and Access Management.
- Consistent administration of security requirements will improve security.

Work Completed to Date:

- Enrollment Business Objectives and High-Level Requirements was delivered on June 30, 2003
- Access Management Business Objectives and High-Level Requirements was delivered on June 30, 2003
- Enrollment High-Level Design was delivered on November 14, 2003
- Access Management High-Level Design was delivered on November 14, 2003

Project Deliverables – eCMO

- The purpose of the eCMO project is to identify how technologies used by CMO can be improved to support the management of eligibility and oversight functions. This vision supports FSA’s organizational objectives to reduce risk.
- The main components of the eCMO Conceptual Design include the Risk Model, the “School View”, Decision Support, and Workflow. These components will help enable Case Teams to achieve decision-making and follow-through that is consistent and efficient.
- An analytics capability will enable outcomes to be measured easily and effectively.

Work Completed to Date:

- eCMO “As Is” Deliverable was delivered on July 22, 2003
- eCMO “Target State” Deliverable was delivered on August 29, 2003
- eCMO Benefits Deliverable was delivered on August 29, 2003

Project Deliverables – Gaps Analysis

- There is an important business need to integrate information regarding the FSA Trading Partners and their interaction. FSA currently manages information regarding the identification and interactions of its Trading Partners through a combination of the Postsecondary Education Participants System (PEPS) and the Title IV delivery systems. This method does not enable FSA to gain a holistic view of its Trading Partners across the enterprise.
- The Gaps Analysis effort identified aspects of IPM that were not yet addressed by previous initiatives. This project will result in end-to-end business requirements packaged in the following deliverables:

Work Completed to Date:

- IPMS Financial Partner Eligibility and Oversight As-Is Flows (2/16)
- IPMS Non-Case Management Requirements (2/16)
- IPMS Financial Partners Eligibility and Oversight Requirements (3/12)

Next Steps

- FSA Leadership will determine next steps and funding allocations to enable IPM capabilities.