

***SFA Modernization Program***  
**United States Department of Education**  
**Student Financial Assistance**



**Campus-Based Programs**  
**Web Design & Navigation Model**

***Task Order #49***  
***Deliverable #49.1.2***

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# 1 Introduction

This documents the design approach that was followed for the web-based FISAP (Fiscal Operations Report and Application to Participate) prototype. This includes web and navigational design.

## 1.1 Purpose

The purpose of this effort was to provide a model for illustrating functional concepts concerning the web-based FISAP and its navigational flow. This model was then used to substantiate the design with numerous stakeholders.

## 1.2 Scope

This document describes the design and navigational flow that was used to develop the prototype web-based FISAP pages. The end solution will primarily provide the institutions with an easy to use and intuitive web-based system that not only allows for easier submittal of their FISAP with real-time validation but provides the Institutions with self service capabilities.

## 1.3 Approach

The web-based FISAP (Fiscal Operations Report and Application to Participate) prototype is being designed in a manner that builds upon the organization and structure of the current PC-based FISAP, while enhancing usability and taking advantage of the design properties of a web application.

The design concept is clean and simple, with attention to text to background contrast for optimal legibility. The color palette selected provides visual interest without intrusive or distracting design elements. The purpose of the site is clearly conveyed through the design, and the Department of Education seal reinforces that this is an official U.S. Government site.

### 1.3.1 Organization

The organization and structure of the FISAP is divided into the six major parts as listed below:

- Identifying Information, Certifications and Warnings
- Application
- Perkins Program
- FSEOG Program
- FWS Program
- Program Summary

### 1.3.2 Navigation

The web-based FISAP provides flexible and intuitive navigation. Upper Navigational Bar is built to provide access from any page in the site to some common features, information needs and links (These include: Home, Help, Glossary, Instructions, and Site Map).

The Left Navigation Bar allows users to move to each of the six FISAP parts and sections within a part. The individual sections can be navigated either through page-level navigation, or using the left navigation bar. Within sections, the navigation circles at the top right part of the page are visual cues to the current part.

Visual cues for a user's position in the form are provided through titles, and color coding of navigational links. Forms within pages have minimal scrolling, while ensuring that related items within parts are logically and sequentially grouped. Users are also provided with access to page-specific help through a link on each page (field level edits will also exist in the production version).

## 2 Focus Group

The web-based FISAP design incorporated many of the design recommendations noted during Focus Groups with the Common Origination and Disbursement (COD) Steering Committee (as well as follow-up recommendations from COD Steering Committee members). These recommendations are summarized below:

### 2.1 General Design Modifications

- Campus-Based in the title was hyphenated.
- Page numbers were incorporated into titles.
- The yellow and white navigational tabs in the upper right corner were reversed to make them more intuitive.
- Section titles were made green to better delineate between parts and sections. The items themselves were not indented due to space constraints.
- A yellow indicator was provided to indicate both FISAP part and section within the web application.
- A Save button was added to each page – to allow users to incrementally save their FISAP, even if incomplete, during a session.
- The “Total” labels were brought into alignment with the text boxes and the total field shaded gray to make it more distinct.
- The numerical entry boxes were aligned consistently from one page to the next.

### 2.2 Part and Section-Specific Design Modifications

- 1A** - A button was added to show that additional institutions could be added.
- 1A** - The Previous button was removed.
- 1B** - A link was provided for the complete text related to Certifications and Warnings.
- 1B** - Signature line was removed from Financial Aid Administrator box.
- 1B** - The email text entry box is sized at 20 characters, but allows for scrolling for entry of additional characters for longer email addresses.
- 2B** - Typos were corrected (allocation, discontinue).
- 2D** - Skip logic across pages is demonstrated for Enrollment Information depending on type of calendar (traditional vs. non-traditional). That is, the user will go to different items for responses - depending on which calendar type their institution follows.
- 3A** - Item 27a (tutors item) was added.
- 6A** - The text entry fields were widened to accommodate up to 11 characters (e.g., 999,999,999).

### **3 Sample Pages**

There have been 14 pages designed, storyboarded and reviewed by the COD Steering Committee and CB representatives. Of the total 14 pages, the following six (6) main sample pages shown in this document illustrate the general design and page layout as recommended by the COD Steering Committee and CB representatives:

- 1A.** Identifying Information
- 2A.** Application to Participate – Funds Request
- 3A.** Federal Perkins Loan – Fiscal Report
- 4A.** FSEOG - Federal Funds Authorized for FSEOG
- 5A.** Federal Work Study – Funds Authorized for FWS
- 6A.** Program Summary for Award Year

The following FISAP pages were designed and storyboarded, but they are not currently shown in this document:

- 1B.** Certifications and Warnings
- 2B.** Application to Participate – Perkins Liquidation Request
- 2C.** Application to Participate – Waiver Request for the Underuse of Funds
- 2D.** Application to Participate – Enrollment Information
- 3C.** Federal Perkins Loan – Cumulative Repayment Information
- 4B.** FSEOG - Federal Funds Available for FSEOG
- 5B.** Federal Work Study – Funds Available for FWS
- 5C.** Federal Work Study - Total Compensation for FWS

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# Campus-Based Program Funding - FISAP

... Fiscal Operations Report & Application to Participate



- 1 Identification**
- A. Identifying Information
  - B. Certifications & Warnings
- 2 Application
- 3 Perkins Program
- 4 FSEOG Program
- 5 FWS Program
- 6 Program Summary

**1** Identifying Information, Certifications & Warnings - (Page 1 of 2) 1 2 3 4 5 6

**A. Identifying Information**

**1a. Name and Address of Institution:**

Name:

Address:

City:  State:  Zip:

**2a. Serial #**

**3. Type of Institution (select one):**

**Proprietary Sub-Type:**

**1b. Name and Address of Institution (if different from 1a):**

Name:

Address:

City:  State:  Zip:

**2b. OPEID #**

**4. Length/Type of Longest Program:**

**5. Additional Locations :**

\* Institutions with separately eligible additional locations which will be funded under this application must list these locations and their addresses and OPEID#s on the screen. You may not file a separate application for any separately eligible institution listed herein.

**We have entered a list of separately eligible additional locations that are included in this application :**  Yes  No

OPEID #	Name	Address	City	State	Zip
<input type="text" value="00452401"/>	<input type="text" value="Jane's Military Academy"/>	<input type="text" value="1 Crystal Drive"/>	<input type="text" value="Crystal City"/>	<input type="text" value="VA"/>	<input type="text" value="20202"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>



## Campus-Based Program Funding - FISAP

... Fiscal Operations Report & Application to Participate

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- [1 Identification](#)
- 2 Application**
- [A. Funds Request](#)
- [B. Perkins Liquid Request](#)
- [C. Underuse Waiver Request](#)
- [D. Enrollment Information](#)
- [E. Assessments & Expenses](#)
- [F. Eligible Aid Applicants](#)
- [3 Perkins Program](#)
- [4 FSEOG Program](#)
- [5 FWS Program](#)
- [6 Program Summary](#)

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1 2 3 4 5 6

### Application to Participate: Award Year 2001-2002 - (Page 1 of 4)

School: Alabama Agricultural & Mechanical University, State: AL - Serial #: 000001

#### A. Request for Funds for the 2001-2002 Award Year

1. Federal Perkins Loan Level of Expenditures:
2. Federal Perkins Loan Federal Capital Contribution:
3. FSEOG Federal Funds:
4. FWS Federal Funds:

#### B. Federal Perkins Loan Program Liquidation Request (participants only; see [Instructions](#))

5. My institution wishes to discontinue participation in the Federal Perkins Loan Program:  Yes  No

#### C. Waiver Request for the Underuse of Funds

My institution has returned more than 10% of its Federal Perkins Loan, FSEOG, or FWS allocation for the 1999-2000 Award Year.

6. My institution wishes to apply for a waiver of the penalty for the underuse of funds and will provide a written explanation of the circumstances:  Yes  No

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March 16, 2001

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# Campus-Based Program Funding - FISAP

... Fiscal Operations Report & Application to Participate



- 1 Identification
- 2 Application
- 3 Perkins Program**
  - A. Fiscal Report
  - B. Fund Activity
  - C. Repayment Info
  - D. >30 Repays 1998-1999
  - E. <30 Repays 1998-1999
- 4 FSEOG Program
- 5 FWS Program
- 6 Program Summary

1 2 **3** 4 5 6

### 3 Federal Perkins Loan Program - (Page 1 of 3)

School: Alabama Agricultural & Mechanical University, State: AL - Serial #: 000001

A. Fiscal Report (cumulative) as of June 30, 2000      Canceled Loans > Principal < > Principal & Interest <

Item	(a) Amount	(b) Num of Borrowers	(c) Debt Balances	(d) Credit Balances
1.1 Cash on hand & in depository as of 06/30/2000			<input type="text"/>	
1.2 Cash on hand & in depository as of 06/30/2000	<input type="text"/>		<input type="text"/>	
2. Funds receivable from Federal government			<input type="text"/>	
3. Funds receivable from institution			<input type="text"/>	
4. Funds advanced to students		<input type="text"/>	<input type="text"/>	
5. Loan principal collected		<input type="text"/>		<input type="text"/>
6. Loan principal assigned to and accepted by the United States		<input type="text"/>		<input type="text"/>
7. Total loan principal Canceled on loans made prior to 07/01/1972 for teaching/military service		<input type="text"/>		<input type="text"/>

          
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## Campus-Based Program Funding - FISAP

... Fiscal Operations Report & Application to Participate

1

 Identification

2

 Application

3

 Perkins Program

4

 FSEOG Program

5

 FWS Program

6

 Program Summary

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### Fed Supplemental Education Opportunity Grant (FSEOG) 1998-1999 - (Page 1 of 3)

School: Alabama Agricultural & Mechanical University, State: AL - Serial #: 000001

**A. Federal funds authorized for FSEOG**

**1. Final adjusted FSE OG authorization**

**B. Federal Funds available for FSEOG Expenditures**

**2. FWS funds transferred to and spent in FSE OG** +

**3. Federal Perkins FCC funds transferred to and spent in FSE OG** +

**4. 2000-2001 funds carried back and spent in 1999-2000** +

**5. Additional 2000-2001 funds carried back and spent for 2000 summer enrollment** +

**6. 1998-1999 funds carried forward and spent in 1999-2000** +

**7. 1999-2000 funds carried forward to be spent in 2000-2001** -

**8. 1999-2000 funds carried back and spent in 1998-1999** -

**9. Additional 1999-2000 funds carried back and spent for 1999 summer enrollment** -

**10. Total Federal funds available for 1999-2000 FSEOG (Total of Fields 1+2+3+4+5+6-7-8-9)** **TOTAL**

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# Campus-Based Program Funding - FISAP

... Fiscal Operations Report & Application to Participate



- [1 Identification](#)
- [2 Application](#)
- [3 Perkins Program](#)
- [4 FSEOG Program](#)
- [5 FWS Program](#)**
  - [A. Fed Funds Authorized](#)
  - [B. Fed Funds Available](#)
  - [C. Funds to FWS Recipients](#)
  - [D. Funds spent for FWS](#)
  - [E. Use of FWS Authorized](#)
  - [F. Job Loc & Dev Program](#)
  - [G. FWS Community Swc](#)
  - [H. FWS Reading Tours](#)
  - [I. FWS Math Tours](#)
- [6 Program Summary](#)

1 2 3 4 **5** 6

## 5 Federal Work Study Program for July 1, 1999 through June 30, 2000 - (Page 1 of 3)

School: Alabama Agricultural & Mechanical University, State: AL - Serial #: 000001

**A. Federal funds authorized for FWS**

**1. Final adjusted FWS authorization**

**B. Federal Funds available for FWS Expenditures**

**2. Federal Perkins FCC funds transferred to and spent in FSE OG** +

**3. FWS funds transferred to and spent in FSE OG** +

**4. 2000-2001 funds carried back and spent in 1999-2000** +

**5. Additional 2000-2001 funds carried back and spent for 2000 summer enrollment** +

**6. 1998-1999 funds carried forward and spent in 1999-2000** +

**7. 1999-2000 funds carried forward to be spent in 2000-2001** -

**8. 1999-2000 funds carried back and spent in 1998-1999** -

**9. Additional 1999-2000 funds carried back and spent for 1999 summer enrollment** -

**10. Total Federal funds available for 1999-2000 FSEOG (Total of Fields 1+2+3+4+5-6-7-8-9)** **TOTAL**

**C. Total Compensation for FWS**

**11. Total earned compensation for FWS Program**

(a) On-campus expenditures

(b) Off-campus expenditures at public or private non-profit agencies

(c) Off-campus expenditures in the private (for profit) sector

**12. Total institutional share of earned compensation (see instructions)**

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# Campus-Based Program Funding - FISAP

... Fiscal Operations Report & Application to Participate



- 1 Identification
  - 2 Application
  - 3 Perkins Program
  - 4 FSEOG Program
  - 5 FWS Program
  - 6 Program Summary**
- A. Recipients & Expenditures by Type of Student  
 B. Calculating Admin Cost Allowance  
 C. Additional Information

1 2 3 4 5 **6**

## 6 Program Summary for Award Year July 1, 1999 to June 30, 2000 - (Page 1 of 3)

School: Alabama Agricultural & Mechanical University, State: AL - Serial #: 000001

### A. Distribution of Program Recipients and Expenditures by Type of Student

Taxable & Untaxed Income	Federal Perkins Loan		FSEOG		FWS		(g) Unduplicated Recipients
	(a) Recipients	(b) Funds	(c) Recipients	(d) Funds	(e) Recipients	(f) Funds	
1. \$0 - \$5,999	<input type="text"/>						
2. \$6,000 - \$11,999	<input type="text"/>						
3. \$12,000 - \$23,999	<input type="text"/>						
4. \$24,000 - \$29,999	<input type="text"/>						
5. \$30,000 - \$41,999	<input type="text"/>						
6. \$42,000 - \$59,999	<input type="text"/>						
7. \$60,000 & over	<input type="text"/>						

Taxable & Untaxed Income	Federal Perkins Loan		FSEOG		FWS		(g) Unduplicated Recipients
	(a) Recipients	(b) Funds	(c) Recipients	(d) Funds	(e) Recipients	(f) Funds	
8. \$0 - \$1,999	<input type="text"/>						
9. \$2,000 - \$3,999	<input type="text"/>						
10. \$4,000 - \$7,999	<input type="text"/>						
11. \$8,000 - \$11,999	<input type="text"/>						
12. \$12,000 - \$15,999	<input type="text"/>						
13. \$16,000 - \$19,999	<input type="text"/>						
14. \$20,000 & over	<input type="text"/>						
15. Graduate/ Professional	<input type="text"/>						
16. Total	<input type="text"/>						
17. Total less than full-time students	<input type="text"/>						
18. Total "Automatic" Zero EFC students	<input type="text"/>						