



Detailed Requirements Document

FSA Students Portal - Release 2

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Author: Anne C. Jensen
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1. Executive Summary

High-level summary of the Students Portal Release 2 Project and a brief description of the purpose of this document.

Project Overview

The FSA Students channel portal will bring together, in one simple, personalized Web page all the information and productivity tools relevant to FSA's customers, employees, and parents to make informed financial aid decisions and empower Students Channel staff to assist students. The personalized "front door" will automatically identify and distribute content relevant to each user. The portals will integrate with existing FSA web sites (e.g., FAFSA, etc.), and external sites (Department of Labor, FINAID, etc.), using the ITA infrastructure. The portals will be the glue that bonds all of FSA's web services together providing a uniform starting point for students and parents to access FSA.

The purpose of this document is to provide a high-level overview of the features, design and functionality of the FSA Students Channel Portal.

Scope

The scope of this document will present FSA with the framework for building a unified portal for students, parents, and financial partners to access FSA Financial Aid information. Release 2 will include enhanced student services and integration with Xap. This phase will also include the development of a customer adoption plan for students.

The Portals release will include:

- **Release 2 (September 30, 2002)**
 - Provide integration with Xap through seamless interface from Students Portal.
 - Provide financial aid assessment information such as or similar to the COHEAO worksheet..
 - Creation of a Customer Adoption Plan for the FSA Students Portal.
 - Build content management tool for Students Portal.
 - Update the following portlets: headlines, search, personalization, security, and feedback/survey.
 - Add or integrate existing and additional FSA links, content, publications, and pages.
 - Provide user-friendly field formats for personalized registration.
 - Build an alert for when users leave the FSA portals and go to non-governmental websites.

Business Needs

FSA's Internet channel has more than 35 web sites connected to multiple back-end systems. The FSA websites do not provide for a unifying theme or a consistent common look and feel across all sites. Students do not have one single entrance point to access FSA's Internet services; they must access multiple URLs to retrieve financial aid information. FSA web sites need a personalized starting point for Students to enter through one "front door" to access a single view of internally and externally stored content/information, application/services, business processes, and knowledge assets for every channel.

Business Problem:



- No single starting point for FSA customers
- No single view of information that can be personalized for Students
- No integration across multiple websites and systems for internal and external use
- No uniform common look and feel for FSA web site(s)
- No consistent standards and architecture
- No common customer care component across all sites

The Requirements and Design Process

The process of defining the functional and technical requirements for the Students Portal Release 2 has been a joint effort between FSA, DataTree, and the Mod Partner team led by Accenture. The project team has interviewed several individuals from various groups within FSA Students channel to gather requirements and ideas, review design decisions, and obtain feedback.

The Mod Partner team designed and developed a portal prototype that was presented to the FSA COO and the FSA General Managers to obtain feedback on several occasions.

The Project Requirements Document

The purpose of this document is to outline the business requirements and the page layouts for the second release of the Students Portal, which is expected on or about September 30, 2002. Future releases and/or enhancements to the system may expand upon these requirements and provide additional functionality to the system's users in Release 3.

As described in the Table of Contents, this document will detail the layout, content and functional requirements for the Students Portal. This will include the process by which this content is approved for public display on the Internet, the way in which students and parents will utilize the pages, and the way in which this utilization will be tracked by FSA to generate future analysis and development of the portal.



Federal Student Aid (FSA) Portal Rollout Project Students Portal – Release 2

2. Functional Requirements



2.1 Introduction to the Students Portal

Overview of the Students Portal Homepage

2.1.1 General Requirements

2.1.1.1 Content Management

The existing Students Portal pages will be modified in such a way so as to allow FSA employees to maintain and update the Students Portal using Interwoven's Teamsite tool. (See Content Management Requirements Matrix for additional information.)

2.1.1.2 Customer Adoption Plan

The Modernization Partner team will work with Students Channel representatives to develop and implement a customer adoption plan and marketing strategy.

2.1.1.3 MyFSA (Personalization)

The applicable functional modules associated with the XapPack, the user's personal account information, will be incorporated into myFSA.

2.1.1.4 Language

All portal content will be reviewed and revised with 2 purposes in mind: to make the language less governmental and to ensure that the language is neutral towards both FFEL and Direct Loans.

2.1.1.5 Site Resources

2.1.1.5.1 Publications section

A publications link will be added to the Site Resources section and will contain .pdfs and links to the following FSA forms and publications:

Publications:

- Free Application for Federal Student Aid (FAFSA) (*External link*)
- Completing the FAFSA (*Internal link*)
- The Student Guide (*Internal link*)
- Funding Your Education (*Internal link*)
- Audio Guide (*Internal link*)
- High School Counselors Handbook (*PDF*)
- Managing the Price of College (*External link*)

Brochures:

- "Student Financial Aid Web Sites" (*PDF*)
- "Myths About Financial Aid" (*PDF*)
- "Why Go To College?" (*PDF*)
- "Choosing a Career" (*PDF*)
- "Choose a School Carefully" (*PDF*)
- "Need training for a job?" (*PDF*)



- “Don’t get scammed on your way to college!” (PDF)
- “Be an informed consumer” (PDF)
- “Military Scholarships” (PDF)
- “Federal Student Aid at a Glance” (PDF)
- Looking for Student Aid (PDF)
- Stafford Loan Forgiveness for Teachers (PDF)
- The EFC Formula (External link)
- Don’t Get Stung! (PDF)
- FSA Glossary (PDF)

FSA Forms

- Loan Cancellation and Discharge Forms
 - Loan Discharge Application: School Closure (Link to PDF on IFAP website)
 - Loan Discharge Application: False Certification of Ability to Benefit (Link to PDF on IFAP website)
 - Loan Discharge Application: False Certification (Disqualifying Status) (Link to PDF on IFAP website)
 - Loan Discharge Application: Unauthorized Signature/Unauthorized Payment (Link to PDF on IFAP website)
 - Total and Permanent Disability Cancellation Request (Link to PDF on IFAP website)
- Forbearance form for FFEL Loans (PDF)
- Forbearance form for Direct Loans (PDF)
- Forms for Childcare Provider Forgiveness Program
 - Application for forgiveness (PDF)
- Direct Loan Forms (External link)
- Direct Consolidation Loan Forms (External link)

2.1.1.5.2 FAQs-Glossary

The current Portal glossary will be combined with Xap's Financial Aid Glossary.

2.1.1.6 Audience pages

2.1.1.6.1 Graduate Student page

A graduate and professional students section will be added to the audience section on the left navigation bar. The page will include information about and links to the following:

- National Association of Graduate and Professional Students (External link)
- Graduate Student Resources on the Web (External link)
- Graduate and Professional School Profiles (External link)
- Student.gov (External link)
- Testing Information (Portal link)

2.1.1.6.2 Returning Students page

The returning students will be expanded to include additional information about and links to the following:

- Self Assessment tool (External link)

2.1.1.6.3 Parents

The Parents page will be expanded to include additional information about and links to the following:



- The Federal PLUS Loan v. Home Equity Loans (*Xap link*)
- The Federal PLUS Loan v. Cashing Investments (*Xap link*)
- The Federal PLUS Loan v. Using 401k Funds (*Xap link*)
- College Savings Calculator (*Xap tool*)
- Tax Incentives for Education-related Expenses (*Xap link*)
- Saving Money for College (*Portal link*)

2.1.2 Home

2.1.2.1 Announcements

An announcements box will be included on the right hand side of the index page, beneath the Site Resources box. Announcements about and links to the latest news and headlines will be contained within the box. If there are no announcements, the box will not be displayed.

2.1.3 Preparing

The Preparing section will be expanded to include additional information about and links to the following:

- Planner Timeline (*Xap link*)
- Student Planner (*Xap tool*)
- College Savings Calculator (*Xap tool*)
- Self Assessment tool (*External link*)

The following sections will be removed from the Preparing section:

- Make a Checklist (*Portal link*)
- Plan Your Classes (*Portal link*)

2.1.3.1 Planner Timeline

The Planner Timeline will include information about and links to the following:

- Grade 8 timeline (*Xap link*)
- Grade 9/Freshman Year timeline (*Xap link*)
- Grade 10/Sophomore Year timeline (*Xap link*)
- Grade 11/Junior Year timeline (*Xap link*)
- Grade 12/Senior Year timeline (*Xap link*)

2.1.3.2 Testing Information

The Testing page will be expanded to include additional information about and links to the following:

- Testing Preparation (*External link*)

2.1.4 Choosing

The Choosing section will be expanded to include additional information about and links to the following:

- College Selection Tools: College Finder, College Matching Wizard (*Xap tools*)
- Campus Tours (*Xap tools*)
- Distance Learning Information (*External link*)



2.1.4.1 Types of Schools

The Types of Schools page will be expanded to include additional information about and links to the following:

- Distance Learning Information (*External link*)

2.1.5 Applying

The Applying section will be expanded to include additional information about and links to the following:

- Online Applications (*Xap tool*)

2.1.6 Funding

The Funding section will be expanded to include additional information about and links to the following:

- State Guarantee Agencies (*External link*)
- Reduce College Costs (*Xap link*)
- How to Choose and Evaluate Lenders (*Portal link*)
- Sample Award Package (*Portal link*)
- Financial Aid Wizard (*Xap tool*)
- Saving Money for College (*Portal link*)
- Other Sources of Federal Aid (*Portal link*)

2.1.6.1 Scholarships

The Scholarships page will be expanded to include additional information about and links to the following:

- General Scholarship Information (*Portal link*)
- What does it take to get a Scholarship? (*Portal link*)
- How do I find out about Scholarships? (*Portal link*)
- How do I apply for Scholarships? (*Portal link*)
- Scholarship Checklist. (*Portal link*)
- External link to FAFSA will be replaced by a link to a Portal FAFSA page containing relevant information in addition to a link to FAFSA. (*Portal link*)

2.1.6.2 Other Sources of Federal Aid

The Other Sources of Federal Aid page will include information about and links to the following:

- Department of Veterans Affairs (*External link*)
- United States Army (*External link*)
- Americorps (*External link*)
- Department of Health and Human Services (*External link*)
- Indian Health Service (*External link*)
- National Institute of Health (*External link*)
- Workforce Investment Act (*External link*)
- Students.gov (*External link*)

2.1.6.3 FAFSA Information

The FAFSA Information page will include information about and links to the following:

- FAFSA on the Web (*External link*)
- PIN Site (*External link*)



- Federal School Code Search page (*External link*)
- Completing the FAFSA (*Internal link*)

2.1.7 Attending

2.1.7.1 Career Information page

The Career Information page will be expanded to include additional information about and links to the following:

- Find a Career (*Xap tool*)
- Career List (*Xap link*)
- External link to Self Assessment tool (*External link*)

2.1.7.2 Closed School Information

The Closed School Information page will be expanded to include additional information about and links to the following:

- List of Closed Schools and Contact Information (*Portal link*)
- Loan Discharges (*Portal link*)

2.1.7.2.1 Closed School Contact Information

This page will be updated on an as-needed basis to include contact information for recently closed schools. Initially, this page will be empty.

2.1.8 Repaying

The Repaying section will be expanded to include additional information about and links to the following:

- Direct Loans Servicing
- Childcare Provider Loan Forgiveness Program (*PDF*)
- Cancellation and Deferment Options for Teachers will become an internal link.

2.1.8.1 Electronic Payment

The Electronic Payment page will be expanded to include additional information about and links to the following:

- EBPP (*External link*)

2.1.8.2 Cancellation and Deferment Options for Teachers

The Cancellation and Deferment Options for Teachers page will include information about and links to the following:

- Canceling a Perkins Loan (*Internal link*)
- Canceling a Stafford Loan (*Internal link*)
- Stafford Loan Deferment Provisions (*Internal link*)
- Douglas Scholarship Reduced Service (*Internal link*)

2.1.8.3 Difficulty Paying

The Difficulty Paying page will be expanded to include additional information about and links to the following:



- Ombudsman (*External link*)