

FSA
FEDERAL
STUDENT AID

We Help Put America Through School

Modernization & Integration Update

COO Overview
September 2002



Goals and Challenges to Modernize

- Congress establishes FSA as a PBO in 1998
 - Integrate disparate student aid delivery systems
 - Improve service to students and participants in federal student aid programs
 - Reduce cost of delivering student aid programs
 - Increase accountability for administering operations of student aid program
 - Implement an open, common, integrated system for the delivery of federal student aid
 - Provide greater flexibility to manage the operations of federal student aid
 - Develop and maintain federal student aid system that contains accurate, complete, and timely data to ensure program integrity



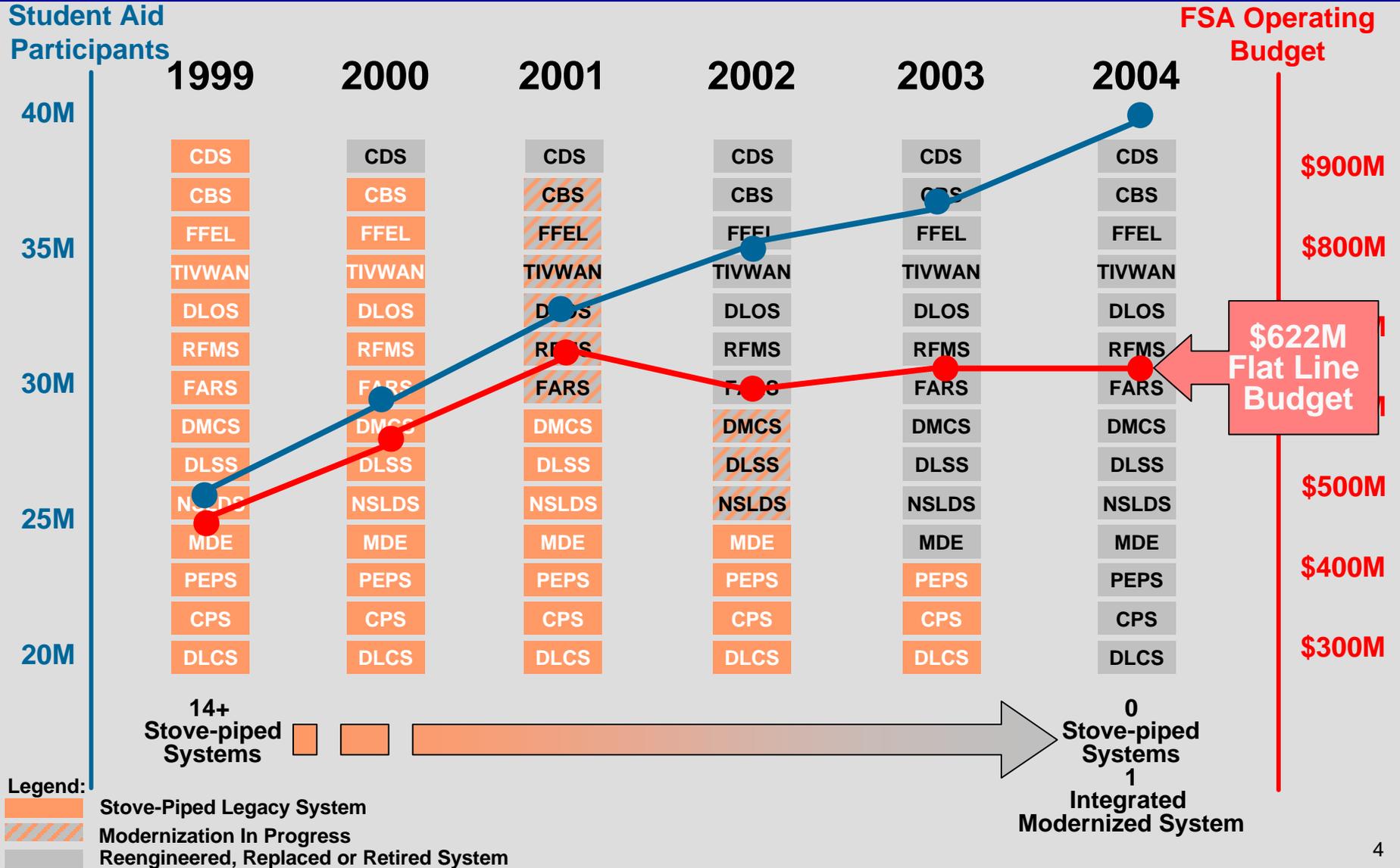
FSA Modernization Goals: Focus on Results

- **Integrate & Simplify Systems and Processes**
 - Enable our systems to seamlessly work together
 - Integrate our systems through reengineering, replacement, and retirement
 - Integrate data within our systems to eliminate redundancies and provide consistent answers and information
- **Improve Service and Access to Federal Student Aid**
 - Focus on the needs of customers
 - Be easy to do business with
- **Increase Program Integrity**
 - Restore trust and integrity to Title IV student aid program
 - Eliminate fraud, waste, and abuse
- **Reduce Costs**
 - Do more with less...serve more with less
 - Protect the public's money



Reengineer...Retire...Replace Modernize Systems to Serve More With Less

July 2002





Modernization Themes: Speed of Change

Moving fast into the future by using proven commercial products and best practices

- Commercial products already tested by the marketplace
- Best practices distilled from many developmental experiences
- Cuts risk or problems, cuts “time to market” in FSA



Pillars of Modernization:

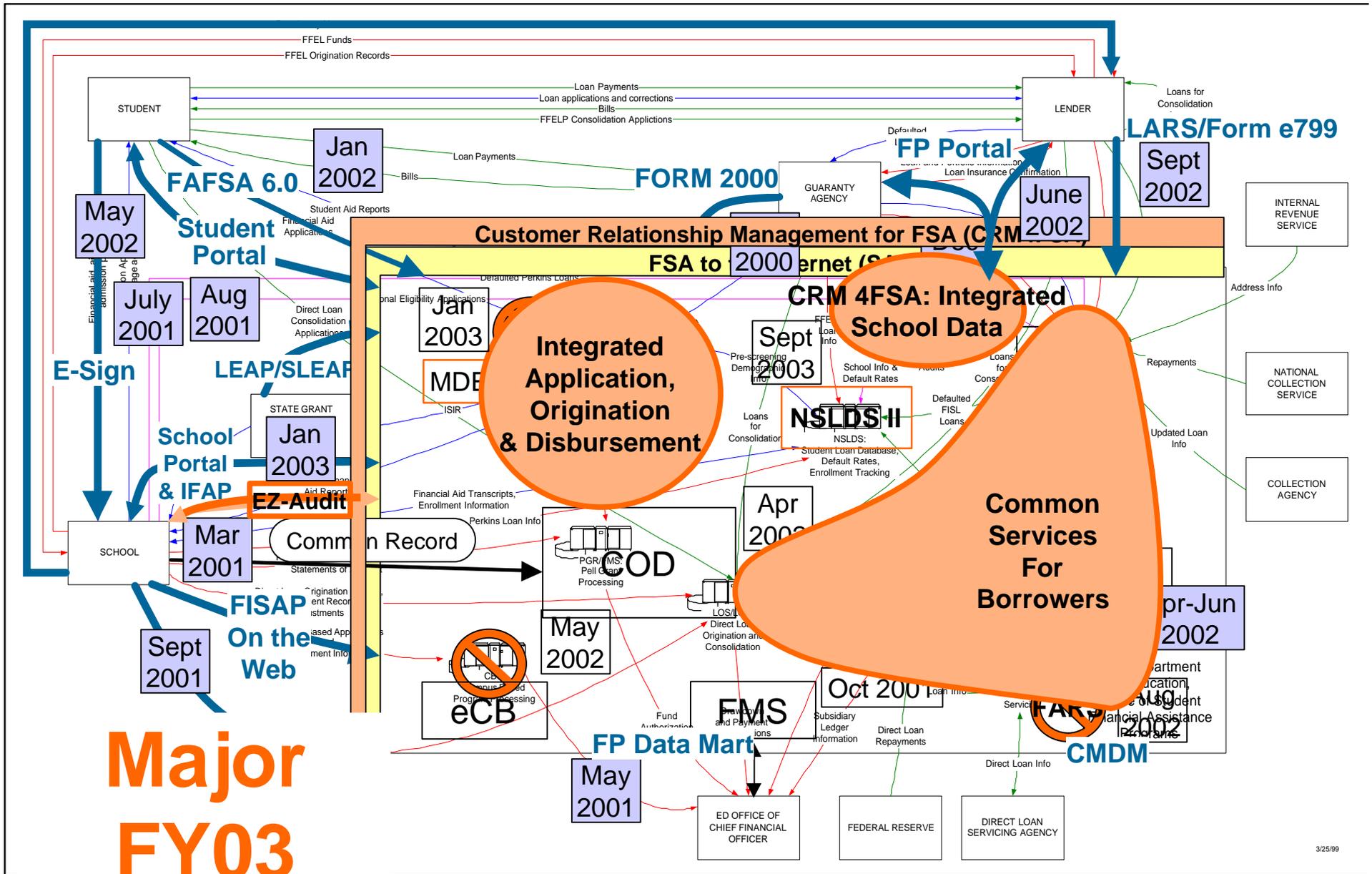
Key pillars drive Modernization of FSA systems and processes

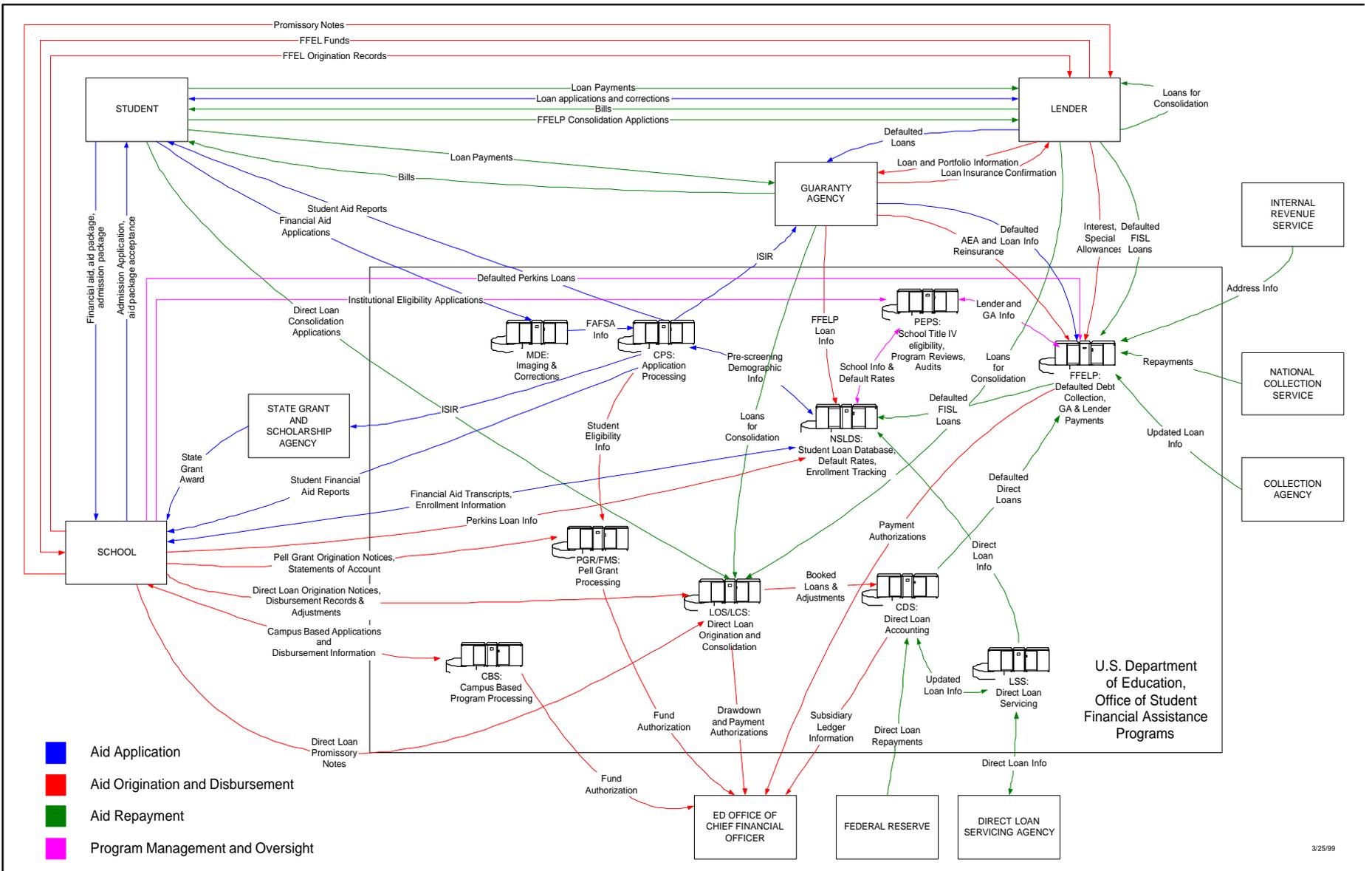
- Paper to Electrons
 - Completely paperless aid delivery experience
- Program Integrity
 - Restoring trust in our financial systems and enhancing integrity
- Customer-centric
 - Committed to providing the right answers and right products
- Integrated Architecture
 - Integrating our systems as we retire the hairball
- Innovation in Contracting
 - Select a partner to help FSA drive the entire transformation
 - Utilize innovative contracting to incent outcomes and solutions
 - Team with operating partners instead of traditional “contractors”



Where We Are Today...

- Modernized solutions enable achievement of FSA goals
- Set the platform for future integration of business with technology



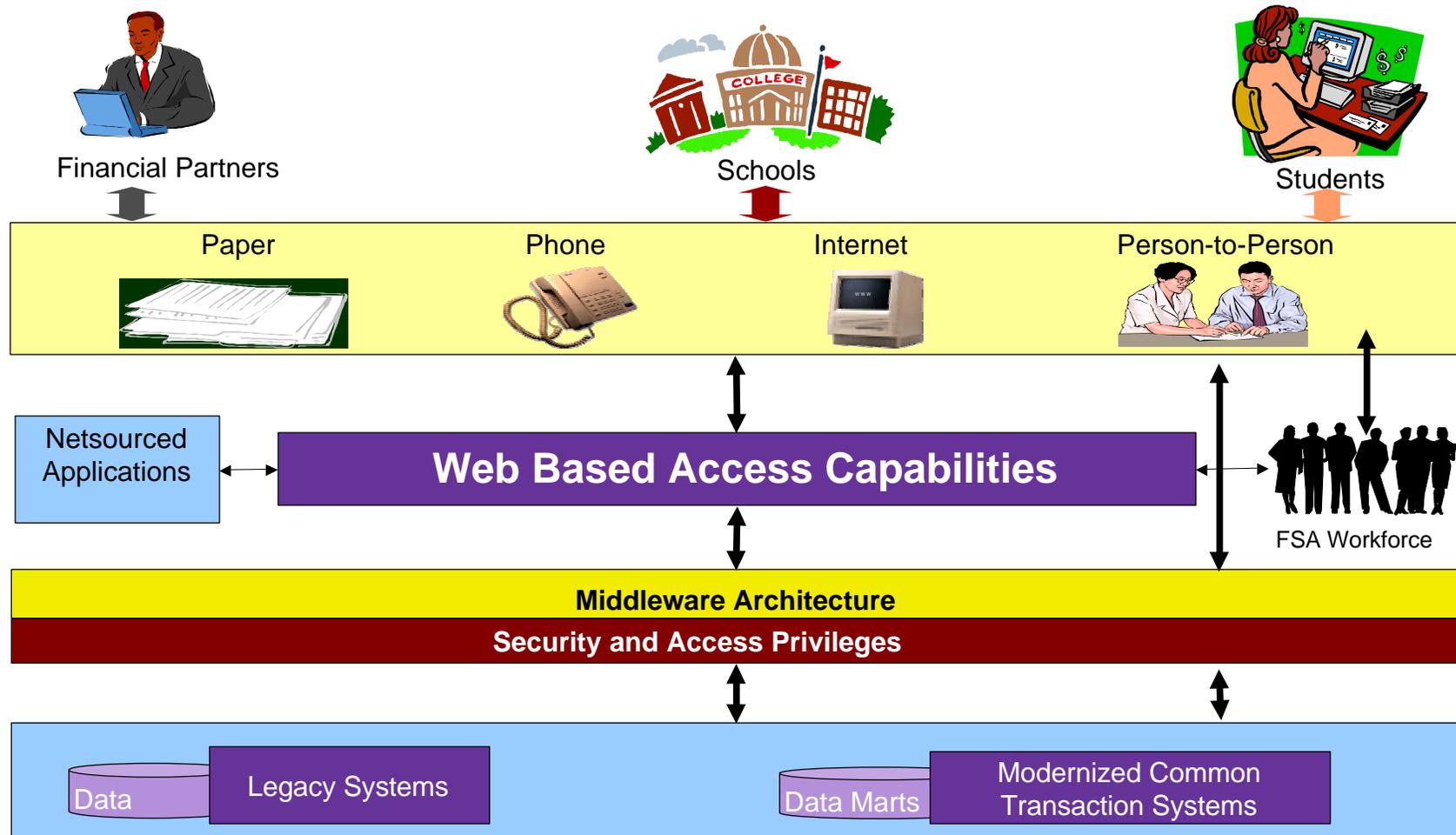




Integrated Architecture

Customer Focused Architecture

Simplified Technical Architecture

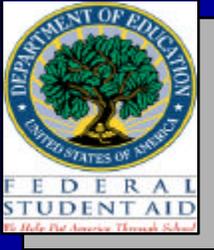




Enterprise Architecture & Technical Infrastructure

COTS Technology at the Core of Systems Integration

- **Integration**
 - EAI Middleware central to integration
 - Integrated Technical Architecture provides coordination of IT development, maintenance, and testing
- **Improve Service & Customer Access**
 - Data integration provides foundation for customer and employee consistent answers
- **Increase Program Integrity**
 - Integrated and consistent data enables accurate business processing
- **Reduce Costs**
 - ITA speeds time to market and reduces cost of solution development



Key Modernization Accomplishments

- Implementation of:
 - Financial Management System
 - FAFSA on the Web v7
 - Students, Schools & Financial Partners Web Portals
 - Common Origination & Disbursement System for Direct Loans, Pell Grants, and Campus Based programs
 - FORMS 2000 enabling on-line transactions for Guaranty Agencies
 - Internet based data transmission system – Student Aid Internet Gateway (SAIG)
 - Electronic Signature for Promissory Notes
 - Financial Partners Data Mart
 - Credit Management Data Mart
 - Lender Reporting System and Lender Application Process (LaRS/LAP)
 - eCampus Based System
 - Learning Management System enabling web based training course and conference registration
 - Middleware technology and integrated technical architecture
 - Security & Privacy policies
 - Procedures, Software Development Artifacts and Guidelines
 - Organization transformation support



Key Modernization Accomplishments

- Retirement of:
 - Central Data System
 - Title IV Wide Area Network (TIVWAN)
 - Campus Based System
 - FARS system
 - Paper Forms 1189, 1130, 704, 1207, 799
 - RFMS & DLOS in FY03



Integration Drives Success

Find the “So What” to meet customer expectations

- Customer needs drive business services
- Customer expectations identify business solutions
- Integrated business capabilities supported by key enablers – people, process, technology



Integrated Leadership: Engage Employees and Partners

- Roundtables and Integration Groups enable collaborative modernization
- Leadership outlines direction, organization drives solution
- Modernization/Integration Partner brings best in breed solutions to solve FSA problems
- Performance incented Operating Partners focus on improved outcomes



Customer Interaction & Participation

FSA Home | Privacy | Security | Notices

FSA We Help Put America Through School
FSA For Students

Preparing | Choosing | Applying | Funding | Attending | Repaying

FEDERAL STUDENT AID
We Help Put America Through School

U.S. Department of Education

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If you attend ...
[Elementary School](#)
[Junior High/High School](#)
[College](#)

FAFSA
THE AFFORDABLE COLLEGE EDUCATION ACT
LOAN Locator

Bookmark This Site Now

"Follow our road to Higher Education beyond High School"

PREPARING **CHOOSING** **APPLYING** **FUNDING** **ATTENDING** **REPAYING**



Customer Interaction & Participation

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FSA
FEDERAL STUDENT AID
We Help Put America Through School

Financial Partners

We Help Put America Through School

U.S. Department of Education

Available Languages

English **Español**

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FP Helpful Links

- [Community Members](#)
- [Current Projects](#)
- [Contact Resources](#)
- [FP Publications](#)
- [Get A Rate](#)

FSA Links

- [Schools Portal](#)
- [Students Portal](#)
- [Loan & Grant Resources](#)
- [FSA Calendar](#)
- [Conference Registration](#)
- [FMS](#)
- [DataMart](#)
- [NSLDS](#)

Welcome To the Financial Partners Portal!

Federal Student Aid (FSA) Financial Partners Channel works in partnership with guaranty agencies and lenders to ensure access to Federal Student Loans, to maintain integrity, and to promote best-in-business practices.

In this portal you will be able to find tools and resources like [FP Community Members](#), [FP Contact Resources](#), and [Publications](#).

You will also be able to link to useful systems like the Oracle [Financial Management System \(FMS\)](#), [DataMart](#), and the [National Student Loan Data System \(NSLDS\)](#).

FSA FINANCIAL SYSTEMS

Financial Management System (FMS)

DataMart

National Student Loan Data System (NSLDS)

Interest Rates

%

Find current and historical interest rate information [here!](#)

FP Publications

%

Find Current regulations, Action Letters, Dear Partner (Colleague) Letters, and Pending Legislation [here!](#)

FSA News

Jan 9 -----

[Students Can Now Apply for Federal Student Aid for 2002-2003 School Year](#)

Dec 15 -----

[Record Numbers of Students Awarded Federal Aid for College, Job Training](#)

[Home](#) | [About Us](#) | [Site Map](#) | [Survey](#)



Customer Interaction & Participation

Welcome to FSA Schools Portal! - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites History Print Copy Paste

Address <http://sfa4schools.sfa.ed.gov/SFAPortal/home/index1.htm> Go Links >>

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Schools Portal

Home | Search | My FSA | Other Links | Help Center | Feedback | Privacy | IFAP

FSA Links & IFAP Database

RESOURCES & TRAINING

- Conference
- Training
- IFAP Library by [Title](#) or [Topic](#)
- Listsevs/Mailing Lists
- Publications and How to Order
- School/Lender/Program Data
- Software and Manuals

FAA Access to Student Data

- COD
- CPS/Applicant data
- Direct Loan: [Origination](#) or [Servicing](#)
- NSLDS for FAAs
- Pell/RFMS

Participation & Funding

- Application/Recertification (E-App)
- eCampus-Based/FISAP
- GAPS & E-payments
- Quality Assurance Program

FSA Calendar

September 2002						
<<						>>
Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	1	2	3	4	5

Thursday, September 5

- You Have a New Schools Portal
- Campus Crime Data Due by October 14, 2002
- Using Play-Based Curricula to Enhance Literacy Experiences for All Young Children

FSA Headlines

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- NPRM - Title IV Program Issues: Comments due October 7, 2002
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- 2003-2004 Latest Draft of the FAFSA Dated 08-21-02 Now Available.
- Federal Student Aid CIO Technology Update
- Comments on Federal Student Aid Report
- Campus Crime Data Due by October 14, 2002
- Register now for FSA's Apps Processing Videoconference
- You Have a New Portal

More ...

Internet



Customer Interaction & Participation

Electronic Transactions Build Customer Confidence

- **Integration**
 - Web portals provide access to FSA systems and business processes
 - Consolidate and eliminate redundant web sites
- **Improve Service & Customer Access**
 - Student Aid Internet Gateway (SAIG) – enables school transaction processing via Internet
 - PIN Site sets foundation for student identification and authentication
- **Increase Program Integrity**
 - eSignature enables electronic promissory note acceptance and speeds loan lifecycle
- **Reduce Costs**
 - Lower cost of business processing
 - Self-service for customers reduces FSA service delivery costs



Aid Awareness & Application: Moving to the Web to enable greater customer interaction

FAFSA on the Web

Home Pin Site Help Contact Us FAQs Site Map

Discover Your Opportunities! Before Beginning a FAFSA **Filling Out a FAFSA** FAFSA Follow-Up

Overview
Pre-Application Worksheet
Fill Out Your FAFSA
Fill Out a Renewal FAFSA
Fill Out a Spanish FAFSA
Open Your Saved FAFSA
Provide Electronic Signature
Make Corrections
Register for Your PIN
Forgot Your PIN?
Forgot Your Password?
Browser Requirements
Filling Out a FAFSA FAQs

Fill Out Your FAFSA

You may use this online application to complete and submit the Free Application for Federal Student Aid on the Web (FAFSA). You may complete and transmit this online form electronically.

In order to be eligible to receive student financial aid, an applicant needs to fill out a Free Application for Federal Student Aid every school year.

First Time Applicants

- If this is the first time you have ever applied for federal student aid, select 'FAFSA' or 'Spanish FAFSA' to begin the application process
- First time applicants will receive a PIN by mail from the U.S. Department of Education once their application is processed. The PIN can then be used to fill out a 'Renewal FAFSA' application for next school year.

Returning FAFSA Applicants

- If you are a returning applicant and have a PIN, you can use it to access your 'Renewal FAFSA' application by selecting "Fill Out a Renewal FAFSA" from the left navigation bar.
- A PIN is not required to fill out and submit a regular FAFSA on the Web application, just select 'FAFSA' or 'Spanish FAFSA' to begin the application process.

If you are applying for a summer session you should check with your school to verify which form they need you to complete.

- **Integration**
 - E-SARS/Pin Site
- **Improve Service & Customer Access**
 - Web enabled information 24 hours/day
 - FAFSA on the Web
- **Increase Program Integrity**
 - An error rate of less than 1% for electronic applications compared to 8% for paper
- **Reduce Costs**
 - Reduction in printing costs (paper to electrons; e-SARs, e-PINs)
 - Enhanced technology and customer service capabilities



Origination & Disbursement: COD & eCampus Based enable integrated Loan Origination & Disbursement

■ Integration

- Core integration at **STUDENT** level
- Multi-dimensional integration of data
 - by **SCHOOL**
 - by **PROGRAM**
- Integration with applicant data (CPS)
- Integrated funds management data (FMS & GAPS)

■ Improve Service & Customer Access

- Web access to integrated views and data such as real-time processing statistics to help a school target improvements to its business process
- Single customer service center for Pell and Direct Loan origination and disbursement

■ Increase Program Integrity

- Consolidated funding information, tracking drawdowns, substantiated cash and progress toward 30-day reporting requirements
- Additional student eligibility edits

■ Reduce Costs

- Retirement of two legacy systems
- Consolidation of two call centers into one and scalable to future CRM4FSA solution

U.S. DEPARTMENT OF EDUCATION
COMMON ORIGINATION & DISBURSEMENT

FSA
FEDERAL
STUDENT AID

Person School Batch Award Reports User

School Search School Financial Aid Contact Information ?HELP

School Information

Financial Aid Contact

Entity ID	36056932
School Name	HUDSON VALLEY COMMUNITY COLLEGE
School Region	02
School Congressional District	21,22

Addresses

Main Address	80 VANDENBURGH AVENUE TROY, NY 12180-6096
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Contacts

In accordance with 34 CFR 668.21, changes to school name, school address (including your branches and locations), names of the Chief Executive Officer/President, Chief Financial Officer (or the equivalent title) or Director of Financial Aid must be reported to the Department of Education. These changes must be reported using the Electronic Application for Approval to Participate in Federal Student Financial Aid Programs (E-App) at <http://www.eligcert.ed.gov>. They may not be made using the COD web update functions.

https://cod.uat.tsysec.com/cod/ja

Start | Inboxes - Microsoft Outlook | COD Online - Microso... | Microsoft PowerPoint - [...]

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Repayment & Servicing

Electronic Transactions Build Customer Confidence

- **Integration**
 - Foundation for future integrated Common Services solutions
- **Improve Service & Customer Access**
 - Modernized Direct Loan Web Site enables interactive account management
 - Electronic Bill Presentment and Payment/Electronic Correspondence (EBPP/EC) provides convenience for borrowers
 - On-line processing of loan deferments and forbearances
- **Increase Program Integrity**
 - EBPP Aggregator allows on-line receipt of bills and payment via partner web portals
- **Reduce Costs**
 - Electronic payment processing reduces service delivery costs

Direct Loan Servicing Online home page - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address http://www.dsonline.com/

Direct Loan Servicing Online

Welcome to Direct Loan Servicing Online. This Web site is for students and parents who have Direct Loans or are considering financing an education and want to know more about Direct Loans.

ACCOUNT INFORMATION

- General Information
- Account Balances
- Payment History
- Payoff Amount
- Account Documents
 - Electronic Bills
 - Electronic Correspondence
 - 1098-E
 - Electronic Promissory Note

ACCOUNT MANAGEMENT

- Address Change
- Exit Counseling
- Online Transactions
- Repayment Estimator
- Repayment Options
 - Electronic Debit Account
 - Make Online Payment

QUESTION CENTER

- Web Site Help
- FAQ
- Glossary
- Calculating Interest

DOWNLOAD FORMS

- Deferment
- Forbearance
- Other Forms

Variable interest rates set to change 7/1/2002
On July 1, 2002 the annual interest rate update will occur for all.



Fiscal Integrity & Core Accounting

Integrated Controls Build Financial Integrity

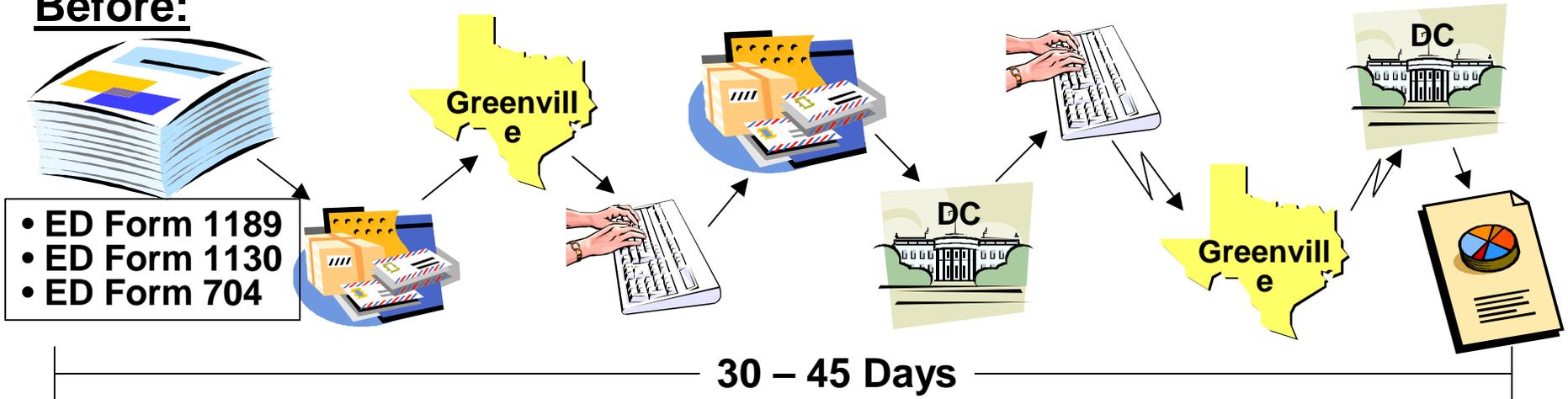
- **Integration**
 - Timely transaction feeds provide FMS with loan level ledger data
 - FMS integrates with GAPS/FMSS to provide account roll-up information
- **Improve Service & Customer Access**
 - FP Data Mart enables financial analysis, preventative measurement and oversight
- **Increase Program Integrity**
 - FORMS 2000 and LaRS (e799 Form)/LAP enable financial partners to conduct electronic financial transactions
 - Financial Management System instills core accounting controls and management
- **Reduce Costs**
 - Data accuracy, streamlined processing
 - Removal of redundant financial data storage



Fiscal Integrity & Core Accounting

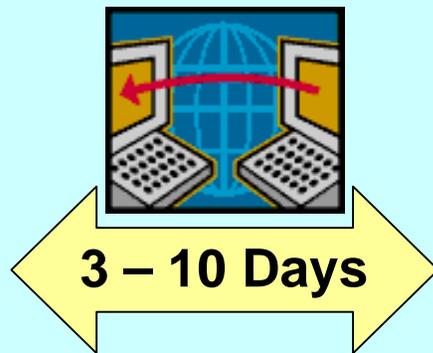
Forms 2000 Cuts Out Paper Mess

Before:



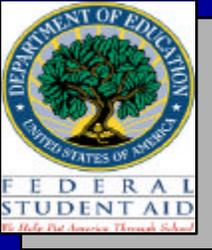
After:

GA's submit via the Web to FSA for payment



Forms 2000

- Costs Less
- Pays Faster
- Has Fewer Errors



Where We Are Going Tomorrow...

- Key challenges targeted for FY03
 - NSLDS II
 - Stream-lined data feeds & direct community participation
 - Accurate data capture, storage, and sharing
 - Common Services for Borrowers
 - Common functions enable reduced costs
 - Integrated servicing, collections & consolidations
 - Integrated Application Origination & Disbursement
 - Integrated processing enables timely business fulfillment
 - Enable seamless completion of business
 - CRM4FSA (Releases 2 & 3)
 - Common enterprise platform for pre-attending & attending, CSCC
 - Enhanced pre-attending phone self service
 - Common platform for Ombudsman, Ed. Services, DCSIS, Students Reg. Offices
 - Enhanced post attending phone self service
 - Common school ID foundation



Consistent Answers

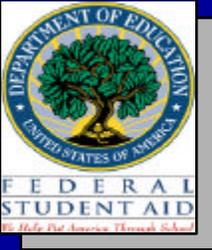
CRM4FSA Transforms Customer Interaction & Enables Business Integration

■ **Integration**

- Transforms customer service at FSA from being “program driven” to “customer driven”
- Common views to account information and account history
- Common tools for customer service employees
- Data integration enables enterprise wide consistency and reduces redundancies

■ **Improve Service & Customer Access**

- One entry point for customers (one phone number, one email address, etc.)
- FSA takes responsibility for getting customers to the right place rather than make the customer figure out where they need to go
- Increased options for self service



Consistent Answers

CRM4FSA Transforms Customer Interaction & Enables Business Integration

■ **Increase Program Integrity**

- More and easily accessible information to use for oversight
- Improved institutional data (parent/child relationships established, synchronized institutional view)
- Assignment tracking and tracking workflow features enhance ability to manage oversight capabilities

■ **Reduce Costs**

- Reduction in call volume (eliminating transfers and misdirected calls)
- Optimized interaction method mix (shift from more expensive agent assisted service to less expensive self service capabilities)
- Lower unit costs through increased effectiveness (using enhanced technology and customer service capabilities) and renegotiated contracts



- What may the future bring as we move towards integration



My FSA – Conceptual View



U.S. Department of Education
Schools Portal



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GO

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Your Tools And Links

Your Headlines

FSA Deadlines...
FSA News...
National News...

Alerts

SAIG Password
Will Expire in 5 Days

Your Status

Your cash
balance is \$0.00

http://www.ifap.ed.gov/eannouncements/0102revEFCwksht.html

Internet

Start | Connect... | Inbox - ... | Microsoft... | FW: Ne... | Welco...

8:12 AM



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Schools Portal



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FSA Links & IFAP Database GO

Student Process History

View/Correct My Student's Data
2002-2003, 2003-2004, Summary

Apply
FAFSA on the Web, Renewal on the Web

Origination
Add, Correction, View Origination Detail

Disbursement
Add, Correction, View Disbursement Detail

Repayment
Maintenance, Reconciliation, Enrollment, Reporting

Cumulative Financial Aid History
Add, Correction, Enrollment, View Detail



Other School Functions

School Eligibility Information
Apply, Re-certification, Contact Information, View Detail

School Funding Information

FSA Calendar

<< **September 2002** >>

Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
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Events Deadlines Training NPRMs

Thursday, September 5

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FSA Links & IFAP Database

My Student's Data – Award Year 2002-2003

MATT KAIN Student ID 123123123 KA
1231 STREET ADDRESS, AK 12345

<p>Student Aid Report</p> <table border="1"> <thead> <tr> <th></th> <th>Date Processed</th> <th>EFC</th> <th></th> </tr> </thead> <tbody> <tr> <td>Transaction 1</td> <td>01/01/2002</td> <td>123</td> <td>View Detail</td> </tr> <tr> <td>Transaction 2</td> <td>01/01/2002</td> <td>123</td> <td></td> </tr> <tr> <td>Transaction 3</td> <td>01/01/2002</td> <td>123</td> <td></td> </tr> </tbody> </table>		Date Processed	EFC		Transaction 1	01/01/2002	123	View Detail	Transaction 2	01/01/2002	123		Transaction 3	01/01/2002	123		<p>Pell Originated</p> <table border="1"> <thead> <tr> <th></th> <th>Date Processed</th> <th>Amount</th> <th></th> </tr> </thead> <tbody> <tr> <td>Transaction 1</td> <td>01/01/2002</td> <td>123</td> <td>View Detail</td> </tr> <tr> <td>Transaction 2</td> <td>01/01/2002</td> <td>123</td> <td></td> </tr> <tr> <td>Transaction 3</td> <td>01/01/2002</td> <td>123</td> <td></td> </tr> </tbody> </table>		Date Processed	Amount		Transaction 1	01/01/2002	123	View Detail	Transaction 2	01/01/2002	123		Transaction 3	01/01/2002	123		<p>Pell Disbursed</p> <table border="1"> <thead> <tr> <th></th> <th>Date Processed</th> <th>Amount</th> <th></th> </tr> </thead> <tbody> <tr> <td>Transaction 1</td> <td>01/01/2002</td> <td>123</td> <td>View Detail</td> </tr> <tr> <td>Transaction 2</td> <td>01/01/2002</td> <td>123</td> <td></td> </tr> <tr> <td>Transaction 3</td> <td>01/01/2002</td> <td>123</td> <td></td> </tr> </tbody> </table>		Date Processed	Amount		Transaction 1	01/01/2002	123	View Detail	Transaction 2	01/01/2002	123		Transaction 3	01/01/2002	123	
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Transaction 2	01/01/2002	123																																																
Transaction 3	01/01/2002	123																																																
		Status																																																
Loan 1	01/01/2002	In Repayment	View Detail																																															
Loan 2	01/01/2002	In Grace																																																
Loan 3	01/01/2002	In Deferment																																																

[View Award History](#)



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FSA Links & IFAP Database

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FAA Correction Entry – Student ID 123123123 KA Transaction 01

2003-2004 Application Correction
Step 1 | Step 2 | Step 3 | Step 4 | Step 5 | Step 6 | Bottom

Step 1. (Q1 – Q35)

1. Last Name	#	KAIN	Select
2-3 First Name, Middle Initial	#	MATT P	Select
4. Permanent Street Address	1231 STREET ADDRESS		Select
5. City	CORALVILLE		Select
6-7 State Abbreviation, ZIP Code	Alaska	12345	Select
8. Social Security Number	123123123		Select
9. Date of Birth	11111980		Select
10. Permanent Home Phone Number	123456789		Select
11. Driver's License Number	123123123		Select
12. Driver's License State Abbreviation	Alabama	Select	Select
13. Citizenship Status	Yes, I am a U.S. Citizen		Select
14. Alien Registration Number			Select



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My Student's Data – Award Year 2002-2003

MATT KAIN Student ID 123123123 KA
1231 STREET ADDRESS, AK 12345

Transaction 04 EFC 456 COA \$10,000.00

[View Application](#)

Program	Total Award	Total Disbursement	Correction
Pell	\$1,000.00	\$1,000.00	\$500.00
Direct Loan	\$3,000.00	\$500.00	
<i>Subsidized</i>	\$2,000.00	\$2,000.00	
<i>Unsubsidized</i>	\$500.00	\$500.00	
<i>Plus</i>	\$500.00	\$500.00	
Campus Based	\$0.00	\$0.00	
Federal Work Study	\$0.00	\$0.00	\$500.00
Perkins	\$0.00	\$0.00	
FSEOG	\$0.00	\$0.00	
Totals	\$4,000.00	\$1,500.00	



We Help Put America Through School
FSA For Students



Preparing Choosing Applying Funding Attending Repaying

FEDERAL STUDENT AID U.S. Department of Education



Available Languages

English Español

If you attend...

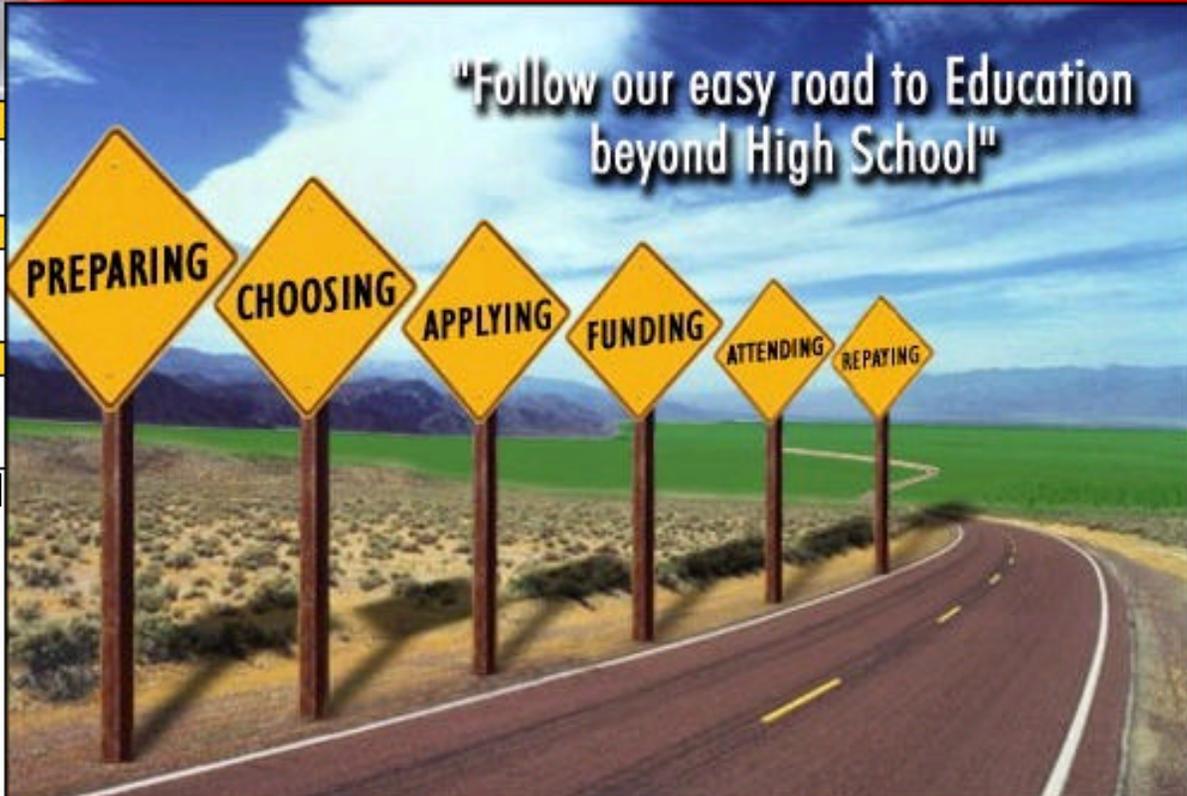
College
Junior/High School
Elementary School

If you are a(n)...

Returning Student
International Student
Parent

If you are applying ...

Register with Us
Apply
FAFSA on the Web
Make Corrections
View your SAR
Award Information
View your Account
View your Repayment History



Search FSA

Search input field with GO button and Advanced Search link

Site Resources

- About Us
- Contact Us
- FAQ's
- Site Map
- Survey
- Technical Help





U.S. Department of Education

Site Search: Input field with GO button and Advanced Search link

- Helpful Links: Community Members, Current Activities, Contact Resources, Publications, Interest Rates

- FSA Links: Financial Partners Home, Schools Portal, Students Portal, Loan & Grant Resources, Community Calendar, FSA Conf. Registration, Training/Registration, FMS, Fin. Partners Data Mart, NSLDS, OPE

Welcome To the Financial Partners Portal!

Welcome to the Financial Partners Portal Home Page! This portal was designed in close cooperation with our many partners in the financial aid community and will be updated regularly with content which will benefit the community we serve.

Federal Student Aid (FSA) Financial Partners works in partnership with Guaranty Agencies, Lenders, Servicers, Trade Associations, Trustees, Schools and Secondary Markets to ensure access for students to Federal Student Loans particularly the FFEL program. In addition, Financial Partners work with State Grant Agencies on the LEAP/SLEAP grant program. We promote best in business and strive for greater program integrity through innovative technical development, oversight, technical assistance, partnership, and community outreach programs.

In this portal you will be able to conduct business using one of our various system processes by linking to the [Financial Management System \(FMS\)](#), access the [Financial Partners Data Mart](#), and the [National Student Loan Data System \(NSLDS\)](#).

You will also find resource tools which will answer your day-to-day business

Publications: Find Current regulations, Action Letters, Dear Partner Letters, and Pending Legislation [here!](#)

Interest Rates: Find current and historical interest rate information [here!](#)

What's New?: View our current [activities](#) page to see what is new!

How Are We Doing?: Please tell us



Making the Integration Vision a Reality

Core Integration Components

- Customer driven, governed by business processes and program integrity goals
- Integrated, consistent data across the enterprise
- Common student and school Ids and attributes
- On-line integrated views and access to the most current data available
- Common services for our customers (borrowers, schools, financial partners)
- Complete systems architecture that fully supports integration
- FSA Integration Team to manage integration



Questions





Appendix

- Back Up Materials



Integrated Application Origination & Disbursement

Integrate Front-End Application Processing with Back-End Origination & Disbursement

■ **Integration**

- Application processing provides real-time feeds to origination and disbursement
- On-line validation of customer inputs with outcome based results (Web EFC and SAR)

■ **Improve Service & Customer Access**

- Improved on-line help and business processing

■ **Increase Program Integrity**

- Real-time edits and validations prevent user or application errors and redundancies

■ **Reduce Costs**

- Real-time decreases overall processing cost



Common Services for Borrowers

Common Services will provide key customer capabilities

■ **Integration**

- Common solution for loan servicing, collections, and consolidation

■ **Improve Service & Customer Access**

- Integrated solutions enable proactive borrower assistance

■ **Increase Program Integrity**

- Management of student through repayment processing
- Integrated data enables preventative measures and trend analysis

■ **Reduce Costs**

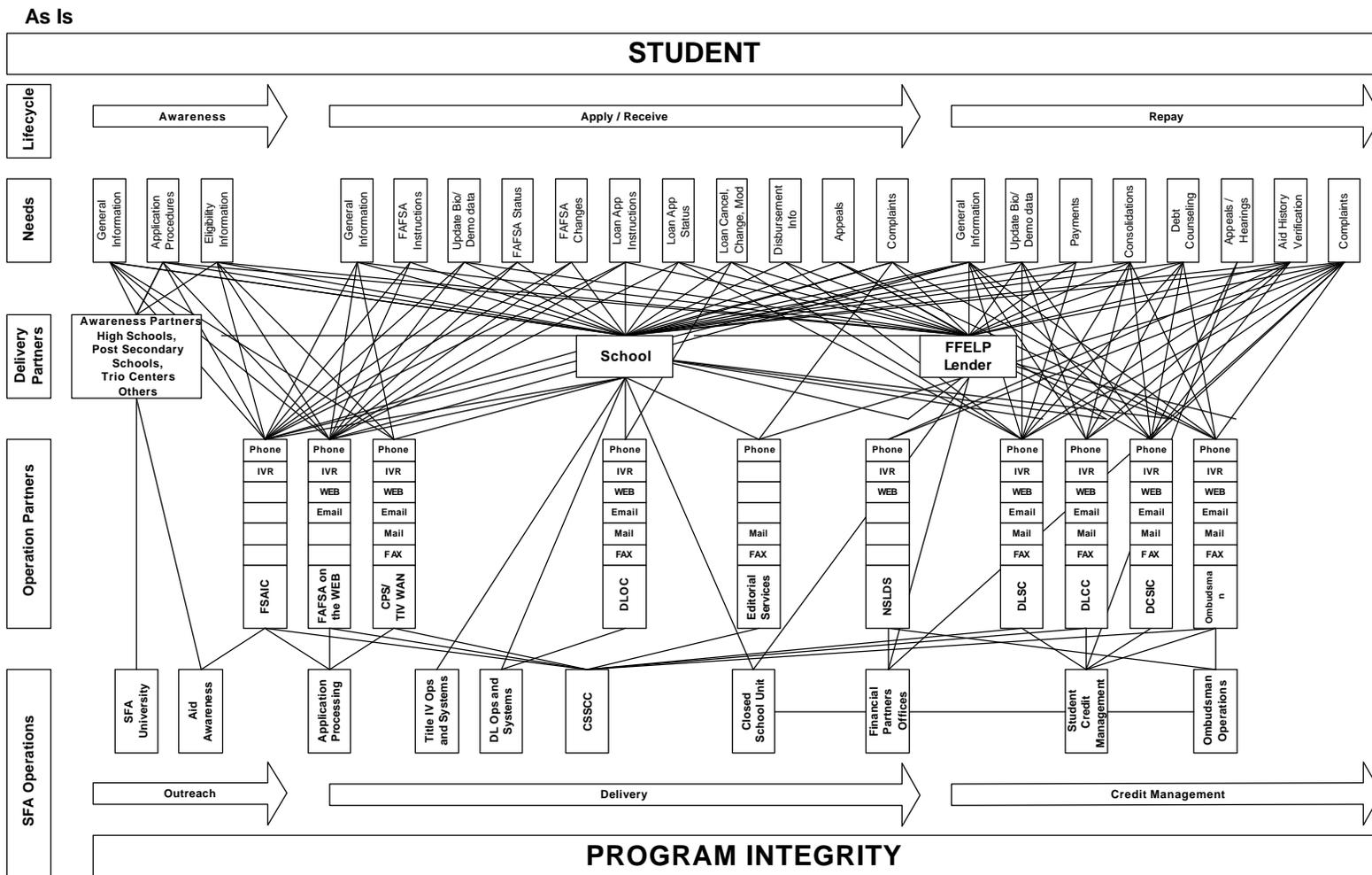
- Common functions and modernized solutions provide cost reductions



Improve Service and Access

Disparate Processes Causes Confusion

As Is Student Customer Contact Experience

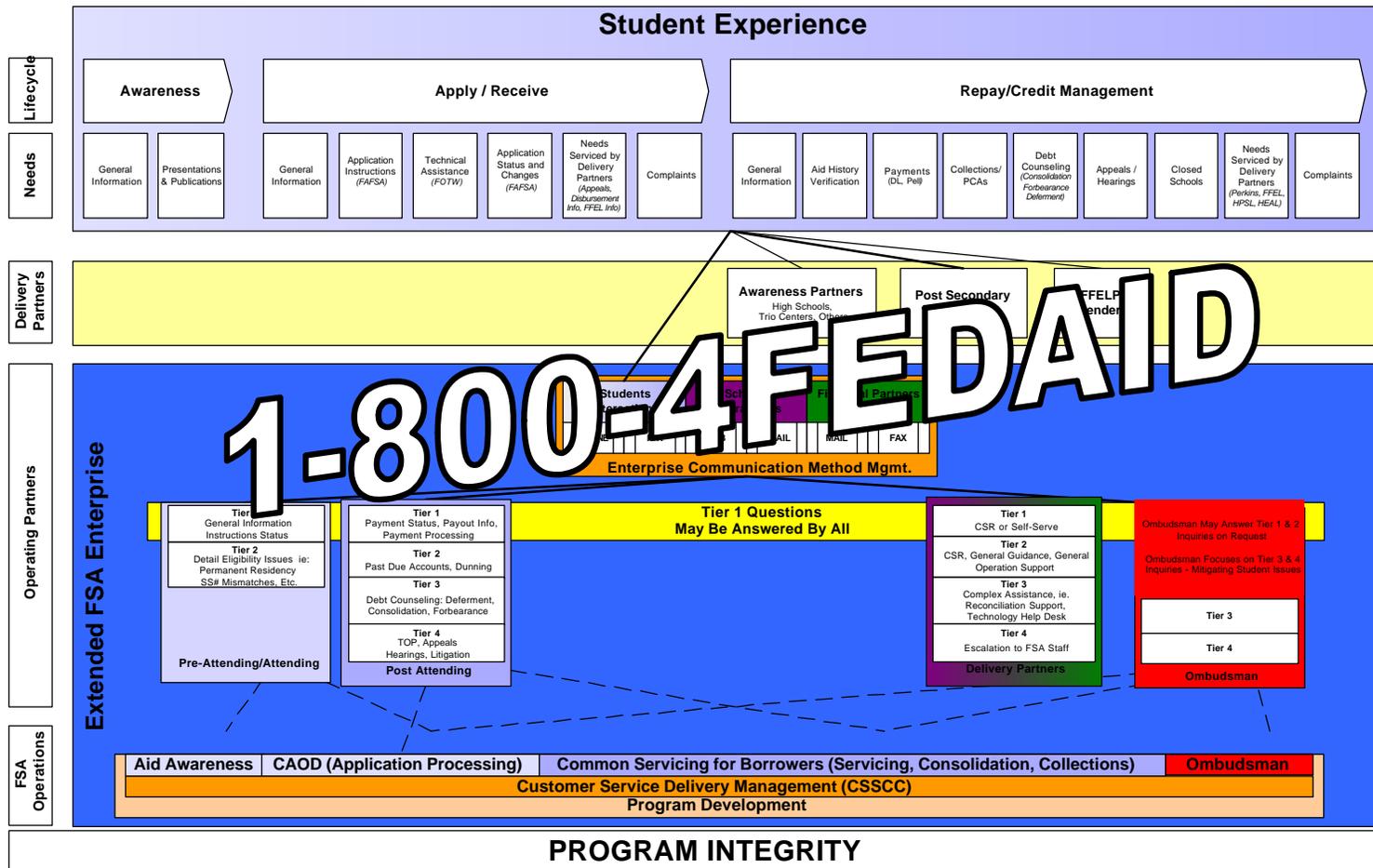




Improve Service and Access Consistent Answers for our Customers

Modernized Student Customer Contact Experience

To Be STUDENTS Customer Service Delivery Model

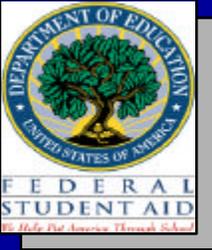




Portfolio Management

Modernized NSLDS central to overall customer information

- **Integration**
 - Data warehouse solution integrates data mart
 - Middleware provides key customer data to Portals, Common Services, and CRM4FSA
- **Improve Service & Customer Access**
 - Real-time data feeds
 - Data sharing with external partners
- **Increase Program Integrity**
 - Accurate loan level data
 - Accessible via data warehouse technologies
- **Reduce Costs**
 - Decreased operating costs tied to modernized architecture



Enterprise Architecture & Technical Infrastructure

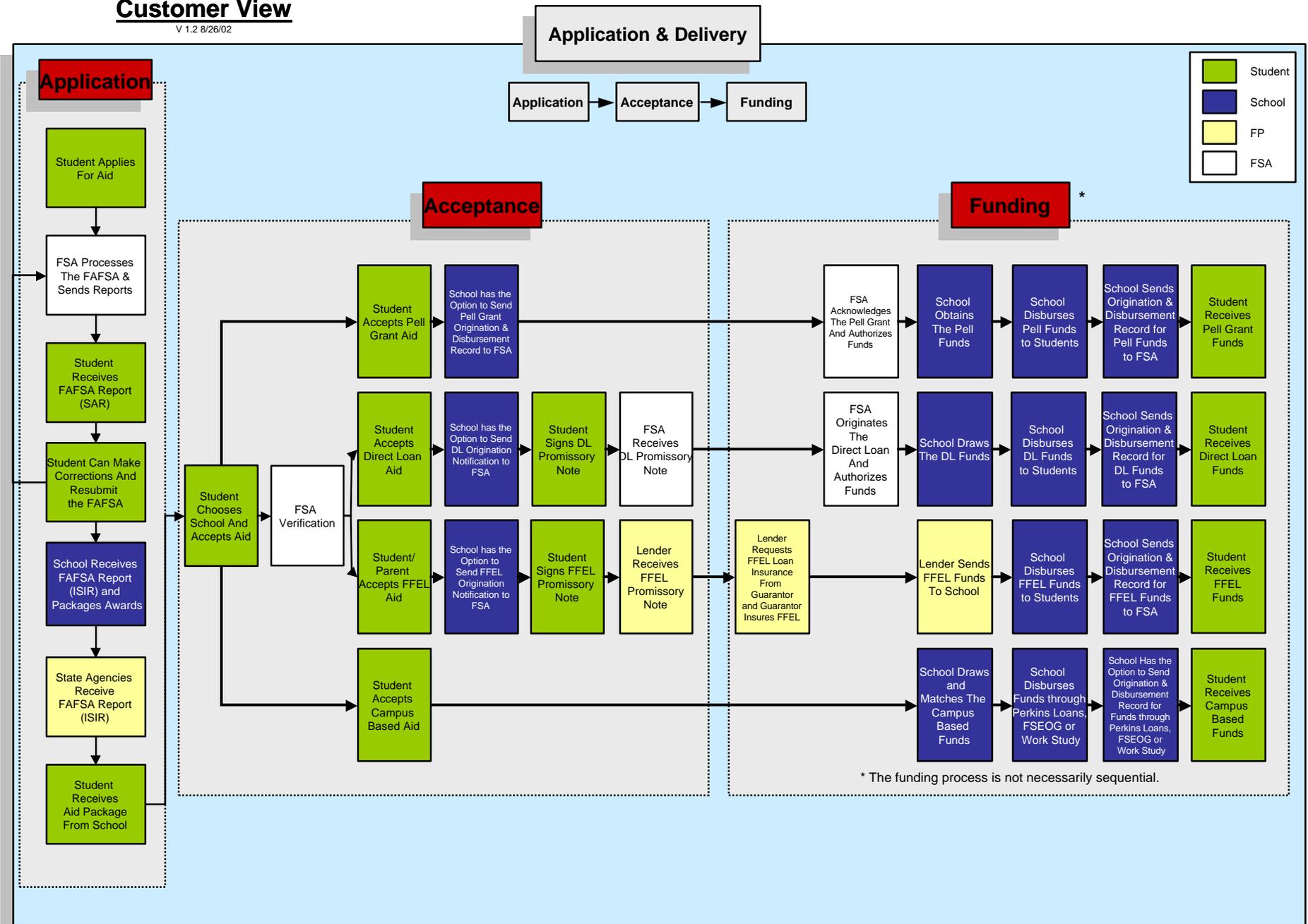
Architecture enables business solutions

- **Integration**
 - Middleware enables flexibility
 - Data integration builds foundation for successful business solutions
- **Improve Service & Customer Access**
 - Single Sign On and user authentication/identification ease customer interaction
 - Critical performance testing increases customer acceptance
- **Increase Program Integrity**
 - Integrated and timely data transfer solutions
- **Reduce Costs**
 - ITA reduces cost of solution development

The Financial Aid Life Cycle

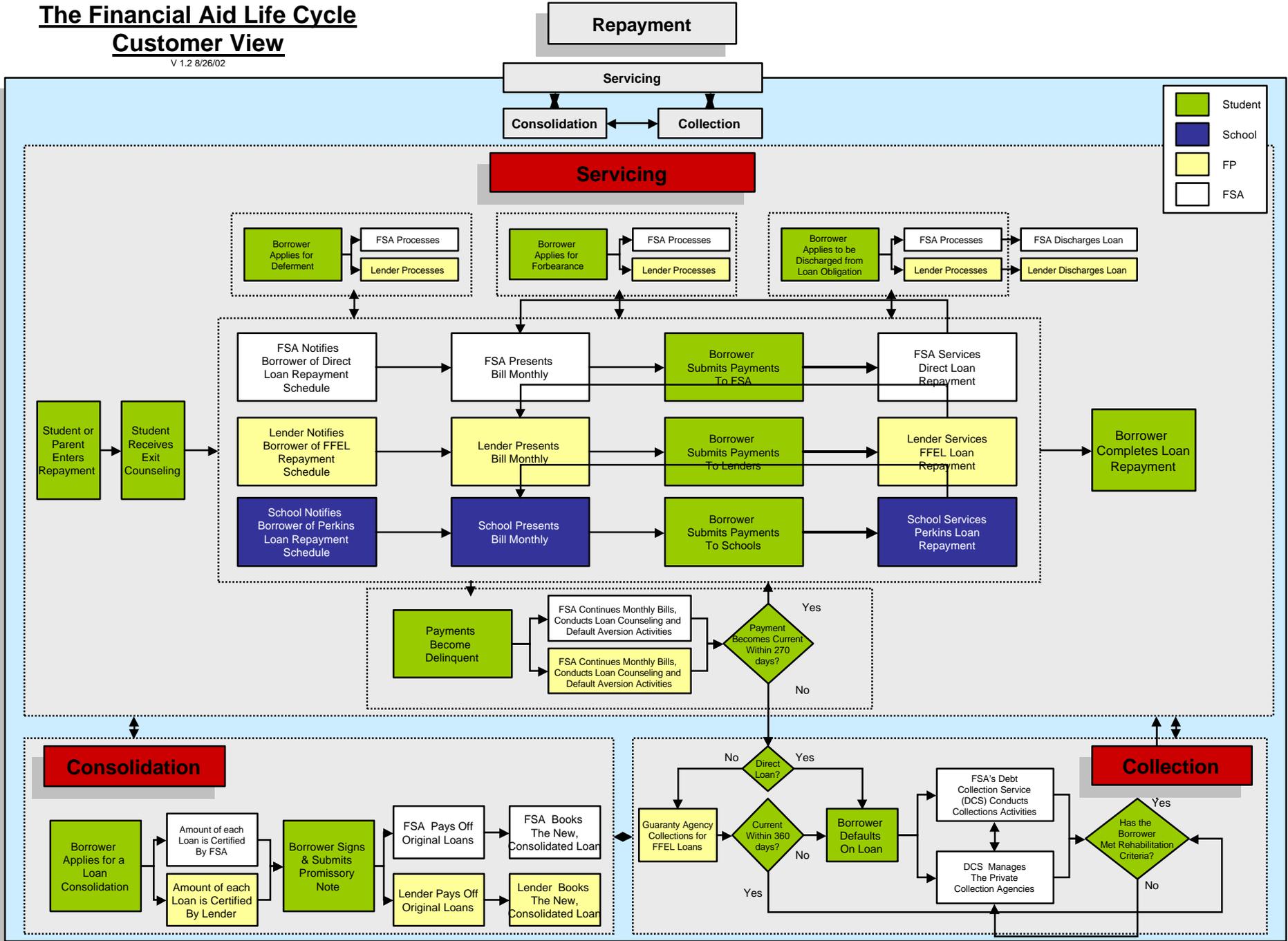
Customer View

V 1.2 8/26/02



The Financial Aid Life Cycle Customer View

V 1.2 8/26/02



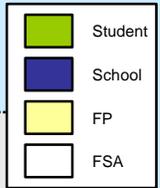
The Financial Aid Life Cycle

Customer View

V 1.2 8/26/02

School & Partner Eligibility

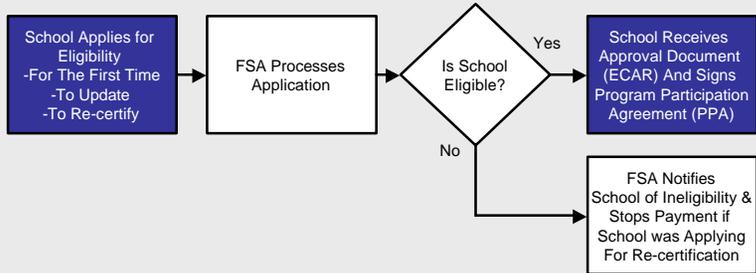
Application → Compliance



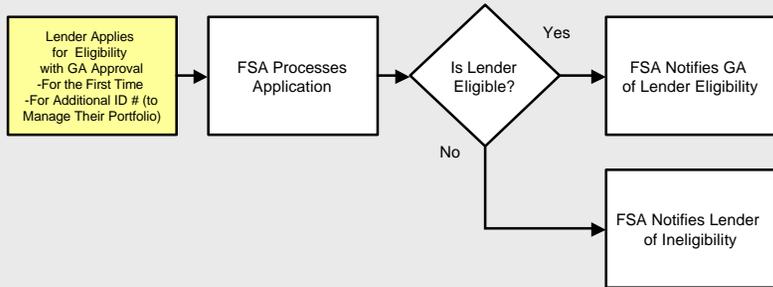
Application

Compliance

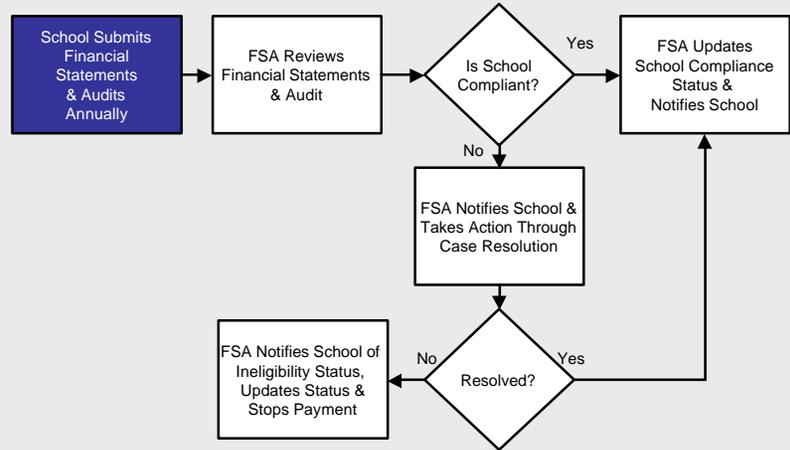
School Application



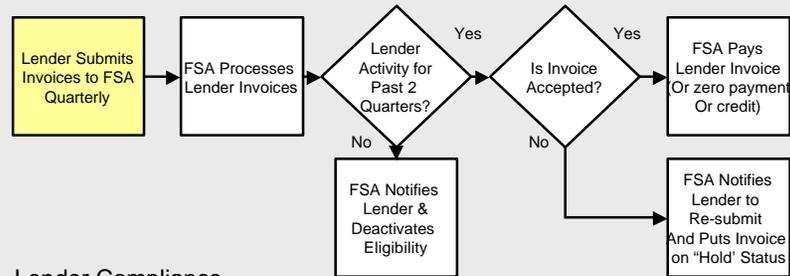
Lender Application



School Compliance



Lender Operations



Lender Compliance

