

FSA External Partner Training Offerings

Date Announced	Begin Date	End Date	Title	Topic(s) / Content	Audience	Delivery Method	Length of Training	#
<b>1995</b>								
01-Sep-95	Oct-95	Oct-95	Direct Loan Reconciliation Training	<p>The one-day training session is designed to help you better understand the Direct Loan reconciliation process and the Department of Education's software that will help you complete the required monthly data match.</p> <p>Upon completion of this training, you will be able to</p> <ul style="list-style-type: none"> <li>-understand the role of reconciliation in Direct Loan processing</li> <li>-understand basic reconciliation concepts and terms</li> <li>-understand the relationship between reconciliation and meeting Direct Loan Program and cash management requirements</li> </ul> <p>Special Sessions for Schools that Develop Their Own Software/Systems</p> <p>The training sessions marked "TECHNICAL" on the schedule are for schools that choose to develop their own Direct Loan data system on a mainframe, PC, or other type of system. The information in these sessions will also be pertinent to those who use EExpress in combination with another system.</p>	School and/or third-party servicer staff who have "hands on" familiarity with Direct Loan processing. Staff should know how to create loan records, originate loan records, print promissory notes, batch records to the Direct Loan Servicing Center, and import acknowledgments.	not specified	one day	
01-Nov-95	Dec-95	Feb-96	Additional Direct Loan Reconciliation Training	see above	see above	not specified	one day	
01-Jan-95	Feb-95	Feb-95	The 1995-96 Updates to EExpress	Application Entry, Packaging, and Direct Loans--software updates	Financial Aid Administrators	Videoconference	3 hours	
01-Jan-95	Mar-95	Mar-95	Direct Loan Servicing	Direct loan servicing	Financial Aid Administrators	Videoconference	2 hours	
01-Mar-95	Apr-95	Apr-95	National Student Loan Data System (NSLDS)	Information on submitting data on Federal Perkins Loans to the NSLDS	For schools and school servicers providing Federal Perkins Loan and FSEOG overpayment data to NSLDS. Business officers responsible for Perkins loan servicing as well as financial aid administrators.	Videoconference	3 hours	
01-Mar-95	May-95	May-95	School Responsibilities under Title IV-- <i>topic later changed to Direct Loan Updates</i>	Gatekeeping, recertification and related topics-- <i>changed later to Direct Loans</i>	School presidents and financial aid administrators and will focus on gatekeeping topics, including the recertification process-- <i>later changed to Direct Loans</i>	Videoconference	2 hours	

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01-May-95	Jun-95	Jun-95	Federal Pell Grant Reporting and Systems Changes with Related Policy Issues	Focuses on Pell automated reporting options, Pell Payment software, selected policy issues related to the awarding of Pell Grants and other topics.		Videoconference	3 hours	
01-Jun-95	Jul-95	Jul-95	Direct Loans: One Year Later	A review of the experiences of schools participating in the Direct Loan program	Schools interested in the Direct Loan Program.	Videoconference	2 hours	
01-Jul-95	Oct-95	Oct-95	SSCR: The New Wave	Focuses on the various aspects of the new automated SSCR processing. This includes creating and processing SSCR data; school and school servicer requirements and responsibilities; the transmission process; and an action plan and implementation calendar for the school.	Registrars and Financial Aid Administrators as well as any other office involved in processing Student Status Confirmation Reports (SSCRs).	Videoconference	3 hours	
01-Jun-95	Oct-95	Dec-95	Fiscal Officer Training	Fiscal Officer Training comprises a workshop overview, introduction and seven sessions with three lab exercises. This training expands on issues covered in the 1995 edition of The Blue Book: Accounting, Recordkeeping, and Reporting by Postsecondary Educational Institutions For Federally-Funded Student Financial Aid Programs.	Fiscal officers: bookkeepers, cashiers, bursars, comptrollers, and other business office staff at postsecondary institutions participating in the programs. Financial aid administrators who need to better understand the Title IV aid responsibilities shared with fiscal officers at their institutions. Such responsibilities include the reconciliation of cash and reconciliation of federal funds.	Classroom training	Two days	25
01-Aug-95	Sep-95	Sep-95	Direct Loan Consolidation	Presents a panel of ED staff who provide information on both regular and in-school consolidation, and a regulatory update on several proposed Direct Loan rules. Participants are offered the opportunity to use a toll-free number or FAX to question the panel of presenters.		Videoconference	2 hours	
01-Sep-95	Nov-95	Nov-95	1996-97 Application and Delivery System Updates	Changes to the 1996-97 FAFSA, the Renewal Application and Student Aid Report, and information on the new Title IV Wide Area Network contract.		Videoconference	2 hours	
<b>1996</b>								
01-Nov-95	Mar-96	Apr-96	Title IV Update Training	Regulatory Update, EDEXpress Update, Cash Management, Refund and Repayment Issues, Student Loan Program Management Issues, Federal Pell Grant Program Update, National Student Loan Data System	Senior financial aid personnel. Space will be limited therefore, only staff who will most benefit from the complex material being presented should plan to attend.	Classroom style lecture	2 days	
01-Jan-96	Apr-96	May-96	Direct Loan Training for New Schools	Provide Direct Loan Program staff at your school with programmatic information and hands-on computer training on the Direct Loan module in EDEXpress, the PC software provided by ED. Staff learn how to make Direct Loans to your students quickly and easily.	Schools newly selected for participation in the Direct Loan program. Staff members who will implement and administer Direct Loans at schools, which includes staff from the financial aid office, business office, and computer services.	Lecture and hands-on computer training	2 days	

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01-May-96	Jul-96	Jul-96	Direct Loan Update '96	Offers current information on Direct Loan origination and servicing activities, proposed regulations, in-school consolidation, reconciliation and training opportunities.		Videoconference	2 hours	
01-Aug-96	Sep-96	Dec-96	Getting Started in EDEExpress	EDE, the Department's Electronic Data Exchange, allows schools to electronically send and receive application data from the Central Processing System (CPS). EDEExpress is the software developed for schools to manage that applicant data, and also contains modules for Direct Loans, packaging, and Pell payment processing. This training will provide an overview of each module, with particular emphasis on application processing and packaging.	Financial aid personnel with day-to-day responsibility for electronic application processing and other electronic functions.	Hands-on computer training	2 days	
01-Sep-96	Oct-96	Oct-96	1997-98 Application and Delivery System Updates	Changes to the 1997-98 FAFSA, the Renewal Application and Student Aid Report, information on the Title IV Wide Area Network, Central Processing System (CPS) changes, and FAFSA Express.		Videoconference	2 hours	
<b>1997</b>								
01/01/97	Feb-97	Feb-97	Policy Update: Recent Title IV Regulatory Changes	Panel of ED policy staff to provide information on new regulations published November 01/01/1996, including Cash Management; Record Retention; Campus-Based Programs; Financial Responsibility	All Title IV institutions	Videoconference	2 hours	1
02/01/97	Mar-97	May-97	1997-98 EDEExpress for Windows	Day 1 - New users of EDE and/or EDEExpress: Getting started in EDE; enrollment procedures for TIVWAN, computer simulation of application processing Day 2 - Experienced users: changes, updates, new features; simulations	Financial aid personnel who have day-to-day responsibility for electronic application processing and other electronic functions.	Hands-on computer training	2 days	
09/01/97	Oct-97	Dec-97	Fiscal Officer Training	Blue Book: NEW ISSUES new recordkeeping and audit requirements, new financial risk ratio regulations, new cash management provisions, and new GAPS. CONTINUING ISSUES: institutional responsibilities, management of Campus-Based Program funds, administration of refunds and repayments.	Fiscal officers at intermediate level - controllers, bursars, cashiers, bookkeepers, and other business office staff. At least 1 year of experience with fiscal administration of TIV aid.		2 days	32
09/01/97	Oct-97	Oct-97	SFAP Update: the 1998-99 FAFSA and More	New electronic initiatives and regulatory information: new electronic requirements for TIV participation; FAFSA on the WEB; changes to the FAFSA and Renewal FAFSA for 1998-99; EDEExpress updates for 1998-99; and information on EDCAPS.	All Title IV institutions	Videoconference	2.5 hours	1

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12/01/97	Feb-98	Sep-98	Electronic Aid Office	Day 1 - How ED Communicates with Schools: TIV WAN and ED; using internet and ED's web sites. Setting Up Your Electronic Office: assessing and planning electronic operations. Electronic Application Processes: electronic application methods; FAFSA on the Web, FAFSA Express, EDEXpress, Renewal FAFSA's, interaction with CPS. Student Eligibility: obtaining financial aid history from NSLDS; postscreening, overview of EDEXpress packaging. Day 2 - Managing Funds Electronically: overview of requesting funds from GAPS. Reporting Electronically: Pell reporting; reporting overpayments to NSLDS; SSCR's; Perkins reporting; Direct Loan reconciliation. Managing Your Systems: recordkeeping requirements; database management; system backups; archiving data. Where We Are Headed and How You Can Get There: what lies ahead, back at the office, ED customer support.	FAA's new to electronic processes and ED software, particularly those with responsibility for managing and/or performing these functions.	Lecture and hands-on computer training	2 days	150
<b>1998</b>								
03/01/98	Apr-98	Jun-98	1998 EDEXpress Application Processing Training	EDEXpress set-up; Electronic FAFSA	FAA's with day-to-day responsibility for electronic application processing. Emphasis on new to electronic processing	Computer lab - CBT's and lecture.	1 day	46
03/01/98	Apr-98	Jun-98	1998 EDEXpress Packaging Training	Packaging set-up; importing ISIR's; award methodologies; queries.	FAA's with day-to-day responsibility for electronic processing.	Computer lab - CBT's and lecture.	2 days	7
06/01/98	Aug-98	Oct-98	National Student Loan Data System Workshop	NSLDS Functionality. Day 1 - overview; cycles and timelines for reporting; problem resolution; mainframe and PC issues; school and third-party servicer responsibilities. Day 2 - software setup; eligibility determination, using FAT and overpayment screens; borrower tracking; using and updating SSCR information.	School personnel working with NSLDS or who need to know how system works and kinds of data which can be obtained. Registrars may also be interested.	Computer lab - CBT's and lecture.	2 days	38
09/01/98	Oct-98	Oct-98	Beyond 1999: The New FAFSA and Delivery System Updates	Overview of changes to 1999-2000 application processing system and ED's latest electronic requirements and initiatives. FAFSA, FAFSA on Web, Renewal FAFSA on Web, EDEXpress updates; new Pell RFMS, plans to use the Internet.	All Title IV institutions	Videoconference	2 hours	1
09/01/98	Nov-98	Dec-98	1999-2000 High School Counselor Workshop	1999-2000 FAFSA, FAFSA on the Web, EFC, packaging, resources, ideas for organizing a Financial Aid night.	High school counselors and others responsible for counseling high school students and parents	One videoconference and 33 one-day workshops	One 2-hour videoconference and 33 1 day	33
<b>1999</b>								

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02/01/99	Feb.-99	Jun-99	1999 - 2000 EDEExpress for Windows 32-bit software: one course on Application Processing and the other on Packaging	<p>The one-day Application Processing workshop includes:                      An Overview of Electronic Data Exchange                      Enrollment procedures for the Title IV Wide Area Network (TIVWAN)                      EDEExpress set up                      Queries and Document Tracking                      The Electronic FAFSA                      Processing and Correcting ISIRs                      Computer based training simulations</p> <p>The two-day Packaging workshop includes:                      Overview of EDEExpress Packaging functions                      Packaging set-up, including academic year profiles, budgets, funds maintenance, and award methodologies                      Importing ISIRs and creating packaging records                      Printing award letters and reports                      Computer-based training simulations</p> <p>For the second day of the packaging training, participants may use either their school's budgets, fund types, and academic year information, or the sample data provided in the training. This information will be used to complete worksheets for all of the setup functions, to create awards, and to print letters and reports based on the data entered. All of these activities will be completed using live EDEExpress software.</p>	Financial aid staff who have direct responsibility for electronic application processing and/or packaging. Introduce new users to EDE concepts, and benefit those new to the software, or to the 32-bit application for Windows 95, Windows 98 or Windows NT.	Workshop	3 days	
04/01/99	May-99	Dec.-99	New Financial Aid Administrator Training	This training introduces you to the Title IV student aid programs. The curriculum covers the basic concepts and procedures that you need to know to properly manage and award federal student financial aid. The training will also help you use our publications and other resources to find the information you need to help students.	New financial aid administrators		3.5 days	
05/01/99	Jun-99	Aug.-99	Fiscal Officer Training (FOT) workshops	<ul style="list-style-type: none"> <li>· the new Recipient Financial Management System (RFMS)</li> <li>· Accounting Procedures</li> <li>· Applying for Federal Funds with the FISAP</li> <li>· Grants Administration and Payments System (GAPS)</li> <li>· Disbursing Title IV Funds,</li> <li>· Returning Title IV Funds (this replaces the refund and repayment requirements)</li> <li>· Reporting in the FISAP, and</li> <li>· Student Record Keeping.</li> </ul>	Comptroller, bursar, cashier, bookkeeper, or other fiscal office staff person at a Title IV postsecondary institution. Financial aid administrators from schools. Attendees should have at least one year of experience in the Title IV aid programs.		2 days	43

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06/01/99	Jul-99	Aug-99	Direct Loan Consolidation Training	Processes and procedures for combining education loans into a Direct Consolidation Loan. Topics include: • The consolidation process • Regaining Title IV eligibility • Eligibility requirements • Counseling borrowers • Repayment options • Borrower assistance service • Deferment options • Other helpful tips	Financial Aid professionals who want to provide effective answers to parents and students about their Direct Consolidation Loans.		1/2 day	
06/01/99	Jun-99		Spring Training '99 workshops for Puerto Rico schools	Each of the two RFMS training sessions will feature the new process of requesting and reporting on Federal Pell Grant funds using the 1999-2000 Recipient Financial Management System. Beginning July 1, 1999, this new reporting system will be required for all Pell schools. Simulations and exercises with EExpress Pell software. The Reauthorization day will focus on the key elements of the 1998 Higher Education Amendments signed into law on October 7, 1998. For staff in the financial aid office who are interested in learning more about the 1998 Reauthorization changes.	Financial aid office staff responsible for Federal Pell Grant processing and reporting. Valuable for all Pell schools whether they are a mainframe school, use a third-party servicer, use EExpress for Pell processing, or use a combination of methods. Includes both an RFMS process overview and hands-on training on the EExpress Pell software.	workshop & computer-based	2 days (combined)	
06/01/99	Jul-99	Oct-99	Direct Loan Consolidation training	This training will cover basic concepts, processes and procedures for combining education loans into a Direct Consolidation Loan. Topics to be covered include:  • The consolidation process • Regaining Title IV eligibility • Eligibility requirements • Counseling your borrowers • Repayment options • Borrower assistance service • Deferment options • Other helpful tips	Financial Aid professionals who assist borrowers with questions about Direct Consolidation Loans.		1/2 day	
09/01/99	Oct-99	Jan-00	federal student aid workshops for High School Counselors and TRIO counselors	Session 1 - Introduction to Student Financial Assistance Programs and General Student Eligibility Criteria. Session 2 - Completing the 2000-2001 Free Application for Federal Student Aid (FAFSA), with questions and answers. Session 3 – Hands-on overview of applying electronically through FAFSA on the Web Session 4 - Getting the Results Session 5 - What the College Does Session 6 – Where to Find Information Other topics include a review of the federal financial aid delivery system and how an expected family contribution (EFC) is calculated.	High school counselors and TRIO counselors who advise students and parents on student financial assistance for postsecondary education.	workshop	1 day	40

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09/01/99	Oct.-99		Power Up for 2000: Application and Delivery System Updates	Student Financial Assistance (SFA) electronic updates and initiatives, focusing on: <ul style="list-style-type: none"> <li>· Changes to the 2000-2001 delivery system</li> <li>· The 2000-01 Free Application for Federal Student Aid (FAFSA)</li> <li>· The 2000-01 Renewal FAFSA</li> <li>· The 2000-01 Student Aid Report (SAR)</li> <li>· FAFSA on the Web</li> <li>· Renewal FAFSA on the Web</li> <li>· Corrections on the Web</li> <li>· Our new SFATECH listserve</li> <li>· Our SFA Technical Support web site</li> <li>· The Student Aid Internet Gateway</li> <li>· Changes to EDExpress software</li> </ul>		Videoconference	2 hours	1
10/01/99			SFA COACH	SFA COACH covers all major SFA topics. It's organized around the functions carried out in school student aid offices and the people who perform them. Designed to give new staff a solid understanding of "What's going on here?" in the field of SFA management, and equip them to build their knowledge using more detailed reference sources.	new financial aid staff	Web-based; available to download from <a href="http://www.ifap.ed.gov/sfacoach">www.ifap.ed.gov/sfacoach</a>		
10/01/99	Dec-99		Reauthorization: New Requirements, New Opportunities	We will examine and explain significant changes to the administration of the Title IV student assistance programs resulting from the last year's reauthorization of the Higher Education Act and the final regulations that have just been published supporting the reauthorization. Discussion will focus on those requirements that most directly affect our school partners:  The Higher Education Amendments of 1998 - HR 6 -- Public Law 105-244 The Negotiated Rulemaking Process The New SFA Ombudsman Office Perkins Loans FFELP and Direct Loans Pell and Campus Based Consumerism Institutional Eligibility Student Eligibility Return of the Title IV Aid (Refunds)		Videoconference	2 hours	1

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12/01/99	Jan-00		Applying for Federal Student Aid: It's Easier Than You Think!"	Filling out the 2000 - 2001 Free Application for Federal Student Aid (the FAFSA) Using the 2000-2001 FAFSA on the Web: the electronic alternative to the paper application process to apply for Federal Student Aid Calculating an expected family contribution (EFC) Understanding how schools "package" financial aid Finding student aid resources F44Organizing a financial aid night at your school	High School Counselors, TRIO Program Counselors, Students, and Parents	Videoconference	2 hours	1
<b>2000</b>								
01/01/00	Feb.-00	Apr.-00	2000-2001 EExpress Application Processing for Windows software	Entering of electronic FAFSA's, to transmit data through Edconn32 for Windows, to retrieve Institutional Student Information Records (ISIRs), and electronic financial aid data management Queries and Document Tracking Processing and Correcting ISIRs	Financial aid personnel who have day-to-day responsibility for electronic application processing and who have had previous experience using the software.	Hands-on' computer training	1 day	
01/01/00	Jan.-00	May-00	Spring 2000 Reauthorization Training	The agenda will be: Session 1: Introduction Session 2: Student Eligibility Issues Session 3: Return of Title IV Funds (lecture) Session 3: Return of Title IV Funds (case studies and demonstration software) Session 4: Master Promissory Note (for the FFEL and Federal Direct Loan Programs).	Financial Aid Director or staff member at a postsecondary institution participating in the federal student financial aid programs under Title IV of the Higher Education Act. Administrators at your school, such as student loan officers and fiscal officers. All attendees should have at least two years of experience administering these programs.	workshop	1 day	50
02/01/00	Jun-00	Aug.-00	Direct Consolidation Loan training	Cover basic concepts, processes and procedures for combining education loans into a Direct Consolidation Loan. Topics to be covered include:  The consolidation process Eligibility requirements Repayment options Deferment options Regaining Title IV eligibility Counseling your borrowers Borrower assistance service Other helpful tips	Financial Aid professionals who assist borrowers with questions about Direct Consolidation Loans.		1/2 day	
02/01/00			SFA Coach	This 36-lesson edition of SFA COACH is based on rules and procedures for the 1999-2000 award year.		Computer-based training		

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03/01/00	May-00	Aug.-00	Direct Loan Accounting Training: The Road to Reconciliation	Learn conceptual and practical skills necessary to meet the U.S. Department of Education's Direct Loan reconciliation requirements. Learn how to calculate Direct Loan cash balances and reconcile across business office, financial aid, and Loan Origination Center systems.  Learn Direct Loan accounting principles through a reconciliation simulation, exercises and discussions. As a course prerequisite we strongly recommend that you have prior Direct Loan experience or have attended a Department of Education Direct Loan training course.	Business and financial aid staff responsible for managing cash and booking disbursements in the Direct Loan program.		1 day	
03/01/00	Apr-00	Dec-00	National Student Loan Data System (NSLDS) workshops	Assist schools in becoming more proficient and comfortable with the entire functionality of NSLDS. Assist users in problem solving. Begins with a system overview and proceeds through a discussion and demonstration of each NSLDS function, using the NSLDS test database and exercises. The content is geared to trainees with little or no knowledge of NSLDS. Topics will include: An overview of NSLDS, NSLDS Student Access, NSLDS for Financial Aid Professionals, Reporting Data, Resolving Conflicts, Software setup and general navigation; Borrower tracking; and Using and updating SSCR information.	School personnel, guarantee agencies and loan companies working with NSLDS or who need to know how the system works and the data retrieval process. Staff from registrar's office and financial aid office. Recommended for inexperienced NSLDS users, or those needing additional instruction.	Lecture and "hands-on" training	1 day	60
03/01/00	May-00	Sep-00	2000-2001 EDEXpress Direct Loan Program	Cover all aspects of the Direct Loan program with an emphasis on using the EDEXpress software. The Direct Loan workshops are scheduled for two-days of training and will include:  Loan Origination the new Master Promissory Note Disbursement processing Cash management and Direct Loan Reconciliation New policies and procedures applying to Direct Loans	Schools using mainframe or custom computer systems and are familiar with EDEXpress software. Persons new to the Direct Loan program should review the Direct Loan School Guide (September 1999). New staff should have a basic understanding of the Title IV programs, policies, and procedures.	"Hands-on" computer training		
03/01/00	May-00	Sept.-00	2000-2001 EDEXpress Packaging for Windows software	Packaging of awards Document Tracking Packaging system setup, award methodology, creating award letters Budgets Satisfactory Academic Progress (SAP) values Academic year profile	Financial aid personnel who have day-to-day responsibility for electronic aid packaging.	Hands-on exercises using a simulated database on live software	2 days	

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03/01/00	May-00	Sept.-00	2000-2001 EDEExpress Pell/RFMS for Windows software	Teach the Pell module and give an overview of the related processes of the Recipient Financial Management System (RFMS). This module provides information on the process for sending and receiving Pell Grant data to and from the U.S. Department of Education's RFMS processor. This course will not specifically address policy and regulatory changes. The Pell/RFMS training will include the following:  RFMS Overview; What is RFMS; RFMS Data Process Flow and Implementation Planning Origination Records Disbursements Funding Data Management	Schools participating in the Federal Pell Grant program. Financial aid administrators involved in the day to day activities of manipulating electronic Pell data. And business officers and technical staff from the schools' data processing office.	Hands-on exercises using a simulated database on live software		
04/01/00			Direct Loan Accounting: The Road to Reconciliation	Learn the conceptual and practical skills necessary to meet the US Department of Education's Direct Loan reconciliation requirements. Learn how to calculate Direct Loan cash balances and reconcile across business office, financial aid, and Loan Origination Center systems. Apply Direct Loan accounting principles through our reconciliation simulation exercises and discussion.	Have prior Direct Loan experience or have attended a Department of Education Direct Loan training course.	Highly interactive	1 day	
04/01/00	Apr-00	Sep-00	2000-2001 EDEExpress Direct Loan	Cover all aspects of the Direct Loan program with an emphasis on using the EDEExpress software. EDEExpress is an ED-developed software that enables schools to process Title IV data electronically using the Department's Electronic Data Exchange (EDE). Covers loan origination, the master promissory note, disbursement processing, cash management and Direct Loan reconciliation, and new policies and procedures for Direct Loans.	Schools using mainframe or custom computer systems and are familiar with EDEExpress software. Persons new to the Direct Loan program should review the Direct Loan School Guide (September 1999). New staff should have a basic understanding of the Title IV programs, policies, and procedures.	Hands-on workshop	2 days	
04/01/00	May-00	Spt-00	2000-2001 EDEExpress Application Processing for Windows software	Provide instruction on the new 2000-2001 software. Simulate the entering of electronic FAFSA's, to transmit data through Edconn32 for Windows, to retrieve Institutional Student Information Records (ISIRs), and electronic financial aid data management Queries and Document Tracking Processing and Correcting ISIRs	Financial aid personnel who have day-to-day responsibility for electronic application processing and previous experience using the software.	Hands-on computer training	1 day	
04/01/00	May-00	Jun-00	"Super Weeks"	Spring 2000 Reauthorization Training, The National Student Loan Data System (NSLDS), and the 2000-2001 EDEExpress software modules for Pell/RFMS, Application Processing, and Packaging.	Customers outside the continental United States -- The training is intended for any school that participates in any of the Title IV programs.	Hands-on exercises using a simulated database on live software	4 days (all modules)	3

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09/01/00	Oct.26-00		Get Connected for the New Millennium: 2001-2002 Application and Delivery System Updates.	The latest Student Financial Assistance (SFA) electronic updates and initiatives, focusing on: <ul style="list-style-type: none"> <li>· A Special Presentation by Kay Jacks: Updates on New SFA Initiatives</li> <li>· Changes to the 2001-02 delivery system, including Central Processing System (CPS) edits and database matches</li> <li>· The 2001-02 Free Application for Federal Student Aid (FAFSA) and Renewal FAFSA</li> <li>· FAFSA on the Web and Renewal FAFSA on the Web</li> <li>· Corrections on the Web</li> <li>· PINs and the electronic application signature process</li> <li>· The redesign of the 2001-02 Student Aid Report (SAR)</li> <li>· Enhancements to the EDEExpress software</li> </ul>		Satellite Videoconference	2 hours	1
12/01/00	Dec.7-00		Applying for Federal Student Aid: It's Free, Fast, and Easy!	Filling out the Free Application for Federal Student Aid (FAFSA) Using FAFSA on the Web: the electronic alternative to the paper application process to apply for federal student aid Calculating an expected family contribution (EFC) Understanding how schools "package" financial aid Finding student aid resources and consumer protection information		Videoconference	2 hours	1
<b>2001</b>								
08/28/96	Apr-00	Jul-00	Direct Loan Accounting: The Road to Reconciliation	Teach attendee's the conceptual and practical skills necessary to meet the US Department of Education's Direct Loan requirements. Learn how to calculate Direct Loan cash balances and reconcile across business office, financial aid and Loan Origination Center systems. Apply Direct Loan accounting principles through reconciliation exercises and discussion.	Student's with experience or have attended a Department of Education Direct Loan training course.	Computer lab (hands on)	1 Day	
01/01/01	Feb-02	Apr-02	2001-2002 Delivery System/Application Processing	Delivery System/Application Processing is a one-day workshop divided into morning and afternoon topics. Participants may attend either the morning session, the afternoon session or BOTH. Delivery System and Queries. Topics include: Changes to FAFSA, FAFSA on the Web, Renewal FAFSA, SAR/ISIR redesign and changes to CPS edits, PINs and Electronic signatures, What's New in EDEExpress Global and Application modules and Developing Queries. Apps 101. Basic hands-on demo's and exercises in EDEExpress Application Processing, Importing, managing and correcting ISIR's and Exporting data.	Advanced and beginner users to EDEExpress	Computer lab (hands on)	1 day	
04/01/01	May-01		2001-2002 Pell System News	Highlights key features of the 2001-2002 Pell System. Topics include Pell Grants on Line, RFMS, and EDEExpress Pell Module.	All FAA's who process Pell Grants	Videoconference	3 hours	
05/01/01	May-01	Jul-01	Direct Loan Basic	A well-balanced overview of the Direct Loan Module in EDEExpress. Topics include Set-up, Importing/Exporting, MPN, Disbursements, Change Records, Reconciliation and Cash Management and Database Maintenance.	Beginners and those who want a refresher course	Computer lab (hands on)	1 day	

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05/01/01	May-01	Jul-01	Direct Loan Update	Designed to give the Direct Loan expert a chance to find out what is new and exciting in the Direct Loan Program for 2001-2002. Topics include What's New in the Direct Loan Program, The Rebuild Process, Cash Management and Compare Program (DL Tools, new for 2001-2002), Reconciliation, Advanced Query.	Advanced users	Computer lab (hands on)	1 day	
09/01/01	Oct-01	Feb-02	2001-02 Fiscal Management Training (FMT)	Focuses on current record accounting, record keeping, and reporting elements. Topics include: Overview of Institutional Responsibilities, Key Fiscal Procedures in Campus-Based Programs, Accounting Procedures for Title IV Programs, Obtaining and Managing and Returning Title IV Funds, Federal Updates	Comptrollers, bursars, cashiers, bookkeepers and other fiscal officers at Title IV postsecondary institutions with at least 2 years experience in Title IV programs.	Classroom/lecture	2 days	
09/01/01	Oct-01	Nov-01	2002-2003 Packaging in EDEXpress	Designed to help schools package their students the easy way. Highlights the advantages of using this comprehensive packaging process.	Interested in Packaging-basic information	Computer lab (hands on)	1 day	
09/01/01	Nov-01		Access for all: Application Processing System Update	Topics scheduled for this broadcast include: New Web Initiatives for Financial Aid Administrators, The Free Application for Federal Student Aid (FAFSA), FAFSA on the Web, and PINs, The Renewal Application Process, SAR, ISIR, and Data Matches, EDEXpress Updates.	All FAA's	Videoconference	3 hours	
11/01/01	Dec-01		Applying for 2002-03 Federal Student Aid: We'll Show You How	Topics include: Using the 2002-03 FAFSA on the Web: the electronic alternative to the paper application process, Filling out the 2002-03 Free application for Federal Student Aid (FAFSA), Calculating an Expected Family Contribution (EFC), Understanding how schools "package" financial aid, finding student aid resources and Using the 2002-03 FAFSA Express software.	All FAA's	Videoconference	3 hours	
<b>2002</b>								
04/01/02	May-02	Jul-02	Application Processing and Quality Analysis	Covers Application Processing-a 5 hour session that will cover EDEXpress Global and Application Processing updates for 2002-03, ISIR's-processing, correcting, transmitting ISIR data and managing electronic financial aid data. Auallity Assurance-a 2 hour session to follow Application Processing that will cover instructions on a new tool that allows the school to evaluate the effectiveness of verification-CPS edits and to learn how to construct reports using custom formats, selected fields and queries to extract specific information about a schools aid applicants.	FAA's who work on a day-to-day basis with Application Processing, Pell Grants or Verification-should have previous experience in EDEXpress.	Computer lab (hands on)	1 day	
04/01/02	May-02	Jul-02	Pell Grants	Covers enhancements to the 2002-03 Pell module of EDEXpress version 8.1, COD as it relates to EDEXpress users, new verification codes, locating on-line resources, cross-module functionality and data tracking and error resolution, How to use EDEXpressqueries and reports to maximize data analysis, Tips to streamline processing and expand your knowledge of the software.	Intermediate users with previous experience with the EDEXpress Pell module.	Computer lab (hands on)	1 Day	

FSA External Partner Training Offerings

Date Announced	Begin Date	End Date	Title	Topic(s) / Content	Audience	Delivery Method	Length of Training	#
04/01/02	May-02	Jul-02	Direct Loan Basic	Provides a basic understanding of the Direct Loan Process. Topics include: Using a live database we'll create and originate loan records, print and manifest MPN's, create disbursement records, make changes to Direct Loan records, and import and export and receive instruction on the use of Direct Loan Tools to aid in reconciliation.	Beginners and those who want a refresher course.	Computer lab (hands on)	1 Day	
04/01/02	May-02	Jul-02	Tools for Ensuring Program Integrity (TEPI)	Day one focuses on a variety of topics that are critical in ensuring that student aid is awarded correctly. Learn to identify the various electronic tools available to assist in resolving troublesome CPS eligibility edits, using NSLDS Transfer Monitoring process, reviewing verification policies and using Quality Assurance tools to enhance that verification process. Day two, introduced to Common Origination and Disbursement (COD) System that all schools must use by 2002-03. This is a system of reporting awards and receiving funds which offers simplicity of reporting, increased efficiency of managing the funds and increased access to the institution's data.	All FAA's who have direct responsibility for awarding and disbursing aid to students.	Classroom/lecture	2 Days	
05/01/02	May-02		SFA COACH 2001-02	Introductory course in student aid management with 36 self-paced lessons.	All FAA's especially those new to financial aid.	Web based		
09/01/02	Oct-02		The FSA Application Processing System: What's New for 2003-04	What's new for the 2003-04 processing cycle. Topics include: enhancements to FAA Access to the CPS Online, changes to the FAFSA, simplified FAFSA on the Web for students who qualify for an Automatic Zero Expected Family Contribution and the simplified needs test, improved electronic communications with students, the ED PIN, changes and enhancements to the Renewal Application Process, the Student Aid REport (SAR), ISIr, Data Matches and and EDExpress Update.	All FAA's	Videoconference	3 hours	