

FSA's Integrated Partner Management Solution

Diahann Greene

U.S. Department of Education

AGENDA

- IPM Overview
- User Access
- Outreach and Training
- Contact Us

IPM Terminology

- Partner – Primary entities such as Schools, Lenders, Guaranty Agencies, and Third-Party Servicers that participate in federal student financial aid programs

IPM Terminology

- Affiliated Partner – Secondary entities, such as Servicers, Auditors, Accrediting Agencies, State Authorizing Agencies, and others who assist in the administration of the Title IV programs on behalf of a participating partner

IPM Terminology

- Application Administrator (AA) – Completes the Eligibility Application (determined through the Pre-Eligibility process)

IPM Terminology

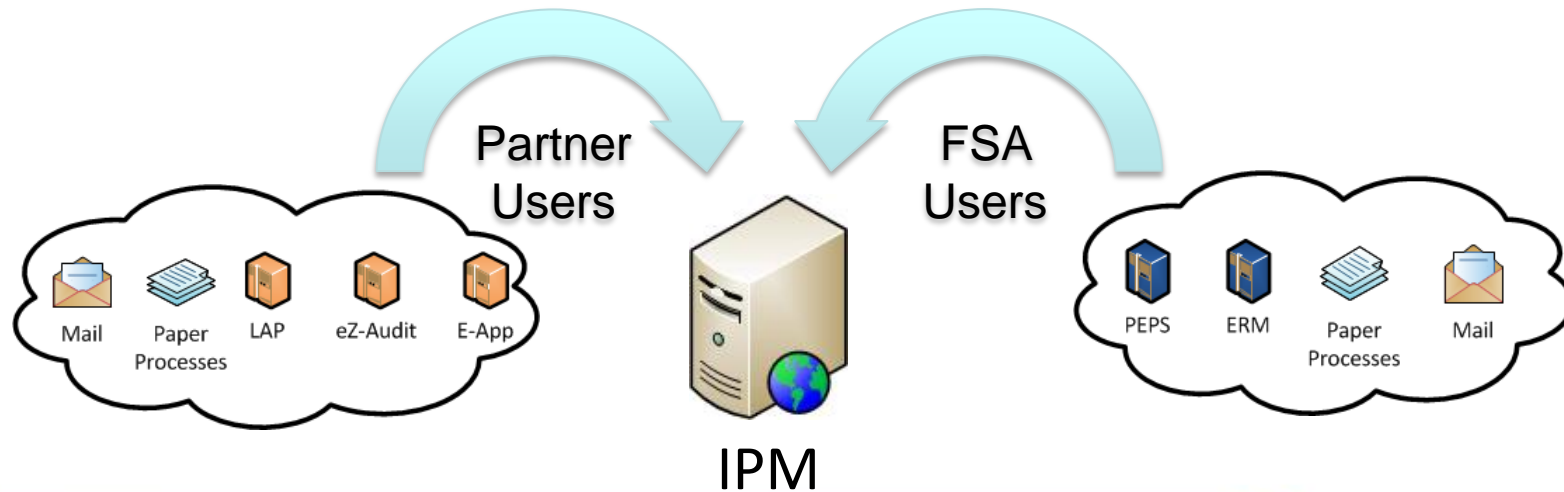
- Destination Point Administrator (DPA) –
Has the ability to create, update, and deactivate users and create DPAs for their affiliated partners

IPM Terminology

- Portal User – An authorized, registered user that has a valid user name and password

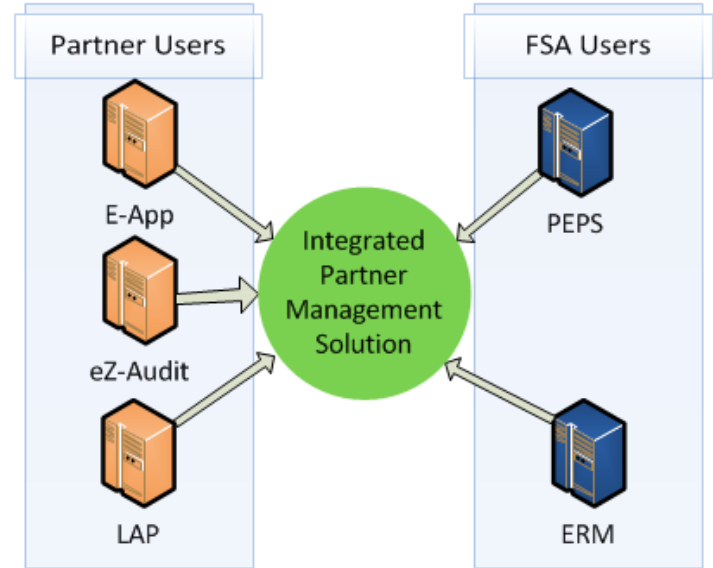
Integrated Processes

- IPM is designed to integrate and streamline core business processes and support processes



Integrated Processes

- Integrated legacy systems:
 - Partner Facing:
 - eApp – Application for Approval to Participate in Federal Student Financial Aid Programs
 - LAP – Lender Application
 - eZ-Audit – Electronic Submission of Financial Statements and Compliance Audits
 - Federal Student Aid Facing:
 - ERM – Electronic Records Management
 - PEPS – Postsecondary Education Participants System



Partner Portal

- Home Page

The screenshot shows the Partner Portal interface for 'Dgreene Public'. At the top, there is a navigation menu with links for Home, Notifications, Eligibility Application, User Management, FSCA, and My Tools. Below the navigation, the user's name 'Dgreene Public' is displayed with an 'Expand' button. The user's identification numbers are listed: OPEID, IPI: 29478230, TIN: 22222222, DUNS: 22222221, and Eligibility Status: No. The 'Notifications' section is active, showing three tabs: Action Required (0 unread of 2), Alert (0 unread of 0), and Warning (0 unread of 0). The 'All (0 unread of 3)' tab is selected. Below the tabs, there is a search instruction: 'To filter your results, enter search criteria into one or more of the fields below and click "Tab" or "Enter." Click "Clear Filters" to re-display the entire list. Clear Filters'. A table displays the notifications with columns for Title and Date Received. The table contains three rows: 'Documents Missing' (05/04/2016), 'Documents Needed for Document Acceptability' (05/04/2016), and 'Application Received' (05/04/2016). At the bottom, there is a pagination control showing '1' page, a page size of '10', and '3 items in 1 pages'.

Home Notifications Eligibility Application User Management FSCA My Tools

Dgreene Public Expand

OPEID: IPI: 29478230 TIN: 22222222 DUNS: 22222221 Eligibility Status: No

Notifications

Action Required (0 unread of 2) Alert (0 unread of 0) Warning (0 unread of 0) Informational (0 unread of 1) All (0 unread of 3)

To filter your results, enter search criteria into one or more of the fields below and click "Tab" or "Enter." Click "Clear Filters" to re-display the entire list. Clear Filters

Title	Date Received
<input type="text"/>	<input type="text"/>
Documents Missing	05/04/2016
Documents Needed for Document Acceptability	05/04/2016
Application Received	05/04/2016

1 Page size: 10 3 items in 1 pages

Partner Tools

- Intuitive Navigation
- Skip Logic/Automated Workflow
- Document Upload/Digitized Documents

The screenshot displays the 'Partner Tools' application interface. At the top, it shows the 'Application Status' as 'In Progress (36%)' with a progress bar. Below this, a list of navigation options is visible, including 'General Questions', 'Officials', 'DPA', 'Accreditation/State Authorization', 'Control and Structure', 'Ownership', 'Educational Programs', 'Locations', 'Additional Factors', 'Title IV Programs', 'More Details', 'Third Party Servicer', 'Administrative Capability', 'Additional Contacts', 'Foreign Gifts', 'Additional Information', 'Upload Documents', 'Application Validation', and 'View PDF'. The 'Upload Documents' section is active, showing a message: 'You must upload the documents listed below in order to successfully submit your application. Please select the document type from the choices provided, search for your documents by choosing "Upload New" from the Actions column then "Browse", to upload each document. If you want to ensure a document that has recently been uploaded, then select "Reuse New". A list of the documents you have uploaded will then be displayed. Please make sure to encrypt any documents containing Personally Identifiable Information (PII) data. If you are unable to encrypt PII data, please contact the School Participation Team. Note: Save and Next will be available after all mandatory documents in the grid below are uploaded.' Below the message is a table with columns: '#', 'Document Type', 'Document', 'URL', '(PII) Data', 'Document Description', and 'Actions'. The table contains two rows of data, both with '(PII) Data' set to 'No'. At the bottom of the interface, there are buttons for 'Previous', 'Save And Next', and 'Cancel'.

Application Status
In Progress (36%)

Partner ID: 03299300 RID: 53586187 TIN: DUNS: Eligible: Yes

Upload Documents

You must upload the documents listed below in order to successfully submit your application. Please select the document type from the choices provided, search for your documents by choosing "Upload New" from the Actions column then "Browse", to upload each document. If you want to ensure a document that has recently been uploaded, then select "Reuse New". A list of the documents you have uploaded will then be displayed.

Please make sure to encrypt any documents containing Personally Identifiable Information (PII) data. If you are unable to encrypt PII data, please contact the School Participation Team.

Note: Save and Next will be available after all mandatory documents in the grid below are uploaded.

[Upload Other Documents](#)

Upload Documents Summary

To filter your results, enter search criteria into one or more of the fields below and click "Tab" or "Enter." Click "Clear Filters" to re-display the entire list. Clear Filters

#	Document Type	Document	URL	(PII) Data	Document Description	Actions
1				No		View Delete
2				No		View Delete

1 Page size: 10

[Previous](#) [Save And Next](#) [Cancel](#)

Partner Tools

- E-sign and Submit
- Submission Confirmation

eSign and Submit

I hereby certify that, to the best of my knowledge and belief, all information in this document is true and correct. I understand that if my institution provides false or misleading information, (a) the U.S. Department of Education may deny the institution's request for eligibility to participate in federal student financial aid programs and/or revoke eligibility once it has been granted and (b) the institution may be liable for all federal student financial aid funds it or its students received. I also understand that I may be subject to a fine of not more than \$27,500 or imprisonment of not more than five years, or both, for misinformation that is material to receipt and stewardship of federal student financial aid funds.

<input checked="" type="checkbox"/> eSignature of akeshe.gupta.fsa, r	eSignature Date 01/23/2014
Job Title [Empty Field]	Institution Name Yes

[eSign and Submit](#)

Submit

Your Submission has been completed.

[Previous](#) [Home](#) [FSCA Home](#)

Partner Tools

- Manage Users
 - Create
 - Edit
 - Deactivate

Add User

User Details Services

Prefix * First Name * MI Last Name * Suffix

-- Select --

E-Mail Address * Please re-enter your E-Mail Address *

IPM System Role *
-- Select --

Continue Cancel

Edit User

User Details Services

Florence Lee

Module Name	Privilege	eSign Authority	Temp eSign Authority	Temp eSign End Date
Eligibility	Full with Document Uplo.	Naisha reddy	No	
Financial Statement	Full with Document Uplo.	Naisha reddy	No	
Compliance Audit	No Access	Naisha reddy	No	
Generic Document	No Access	Naisha reddy	No	

Save Cancel

Partner Tools



- Managing Tasks and Notifications

Notifications

Action Required (0 unread of 2) Alert (0 unread of 0) Warning (0 unread of 0) Informational (0 unread of 1) **All (0 unread of 3)**

To filter your results, enter search criteria into one or more of the fields below and click "Tab" or "Enter." Click "Clear Filters" to re-display the entire list. [Clear Filters](#)

Title	Date Received
<input type="text"/> <input type="button" value="T"/>	<input type="text"/> <input type="button" value="T"/>
Documents Missing	05/04/2016
Documents Needed for Document Acceptability	05/04/2016
Application Received	05/04/2016

1 Page size: 10 3 items in 1 pages

Partner Portal

- Partner Summary

The screenshot displays the Federal Student Aid Partner Portal interface. At the top, it features the 'Federal Student Aid' logo, the text 'PROUD SPONSOR of the AMERICAN MIND™', and a user login area for 'PPSCOAdministrator'. Below the header is a navigation menu with tabs for 'Home', 'Administration', 'Eligibility Application', 'Partner Affiliation', 'User Management', 'Document Management', and 'Partner Information'. The main content area shows the user is logged in as 'CentralAdmin' and is viewing the 'Eligibility Summary' for 'Landegg International University'. A table lists key identifiers: Partner ID, RID (11382889), TIN, DUNS, and Eligible status (Yes). A detailed 'Eligibility Summary' section provides further information: Partner Name, Trade Name/DBA, Partner Address, Organization Type (Organization), Lender Trustee (XYZ), Certification Status (Active), PPA Execution Date (10/30/2013), PPA Expiration Date, OPA Expiration Date (10/30/2013), Recertification Due Date, Application in Progress (Yes), Application Submitted, Date Submitted (10/09/2013), Eligible Titles (II, IV), and Case Team (Boston). A 'Next' button is visible at the bottom of the summary section.

Federal Student Aid | PROUD SPONSOR of the AMERICAN MIND™
An OFFICE of the U.S. DEPARTMENT of EDUCATION | PPSCOAdministrator | Logout
Working on behalf of International University

Integrated Partner Management

Home Administration Eligibility Application Partner Affiliation User Management Document Management Partner Information

You are here : CentralAdmin >

My Tools

- Actions
- Links

Landegg International University [Expand]

Partner ID:	RID:	TIN:	DUNS:	Eligible:
	11382889			Yes

Eligibility Summary

Partner Name :	Partner ID :
Trade Name/DBA :	RID : 11382889 DUNS :
TIN :	
Partner Address :	
Organization Type : Organization	Lender Trustee : XYZ Eligible : Yes
Loan Deferment : No	Certification Status : Active PPA Execution Date : 10/30/2013
PPA Expiration Date :	OPA Expiration Date : 10/30/2013 Recertification Due Date :
Application in Progress : Yes	Application Submitted : Date Submitted : 10/09/2013
Eligible Titles : II, IV	Case Team : Boston

[View ECAR](#) | [View PPA](#)

Next

Integrated Communication

- Instant Feedback
 - Errors and/or Missing Information
 - Help Text and Alerts

The top screenshot displays the 'Application Validation' section. It features a table of errors:

Screen Name	Type	Message
School Information	Error	What is your 9-digit Dun & Bradstreet Number (DUNS)? is Required.
Officials	Error	Please provide details of Officials
DPA	Error	Please provide DPA details.
Ownership Summary	Error	Is your institution directly or indirectly owned in whole or in part by any person, partnership, entity, or corporation other than a non-profit corporation at any level within the institution's corporate ownership tree? is Required

The bottom screenshot shows the 'Educational Program Types' section. It includes a 'Required Field' label and a text area for program details. An alert dialog box is overlaid on the form, stating: 'Alert: Master's or Doctoral Degree Programs must now be reported separately.' with an 'OK' button.

New User Access

- New partners will go through the IPM enrollment process
- Initial application does not require user credentials

New User Access

- After eligibility processes are complete,
 - Application Administrator (AA) will receive user credentials
 - Destination Point Administrator (DPA) will receive user credentials to establish other users

New User Access

- New User Enrollment and Resources

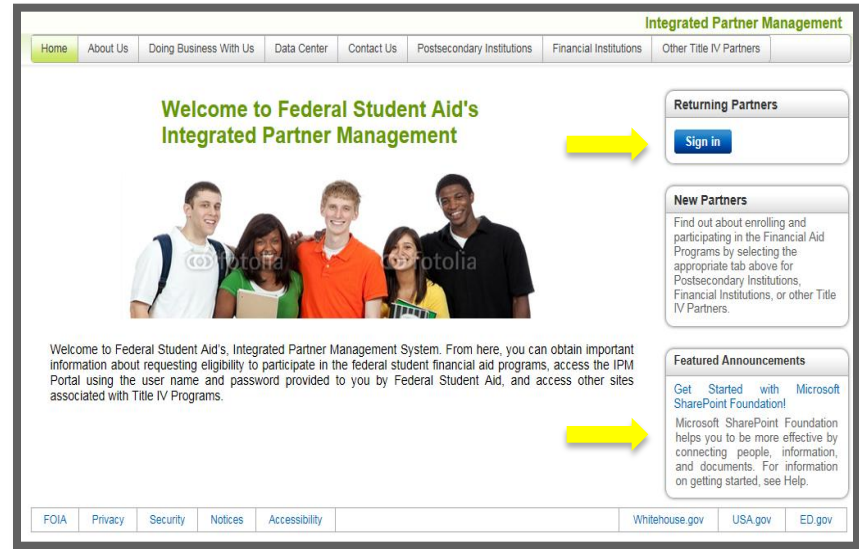
The screenshot shows the Federal Student Aid website. At the top left, it says "Federal Student Aid" and "An OFFICE of the U.S. DEPARTMENT of EDUCATION". To the right, it says "PROUD SPONSOR of the AMERICAN MIND™". In the top right corner, there is an "Accessibility" icon and "Welcome Guest Sign In". Below this is a navigation menu with items: Home, About Us, Doing Business With Us, Data Center, Contact Us, Postsecondary Institutions (highlighted in green), Financial Institutions, and Other Title IV Partners. Below the navigation menu, there are three main content sections on the left: "Enroll and Participate:" with a yellow arrow pointing to it, "Resources for Schools:", and "Resources for your students:". On the right side, there are two boxes: "Returning Partners" with a "Sign in" button and "New User?" with a link to "Pre-Eligibility Requirements", and "Featured Announcements" with a link to "Get Started with Microsoft SharePoint Foundation!". At the bottom of the page, there is a footer with links for FOIA, Privacy, Security, Notices, Accessibility, Whitehouse.gov, USA.gov, and ED.gov.

Existing User Access

- Before you can access IPM, all users require:
 - Provisioning
 - Username/password and token
 - Completed Debarment Checks
 - Performed by FSA with user consent
 - System for Award Management (sam.gov) used to perform the debarment checks

Existing User Access

- Returning Partner Login
- Featured Announcements



Outreach and Training

- Proactive updates and information will be posted to ifap.ed.gov
- Customized targeted multi-media training on IPM will be provided for all partners
 - Target timeframe for training is 4–6 weeks prior to ‘Go-Live’ in Spring 2017

Questions and Comments

- Submit questions and comments to:

IPMQuestions@ed.gov

QUESTIONS?

