FSA's Integrated Partner Management Solution

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AGENDA

- IPM Overview

- User Access

- Outreach and Training

- Contact Us

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IPM Terminology

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

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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

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IPM Terminology

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

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IPM Terminology

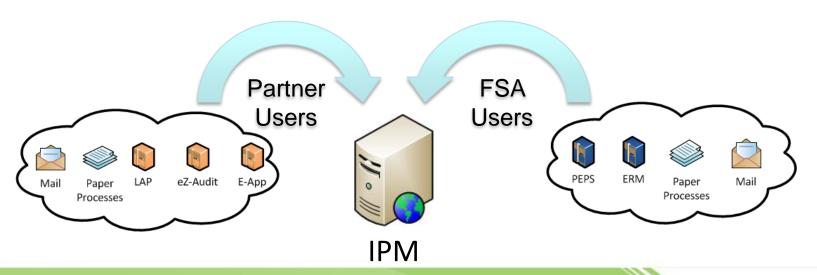- Destination Point Administrator (DPA) – Has the ability to create, update, and deactivate users and create DPAs for their affiliated partners

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IPM Terminology

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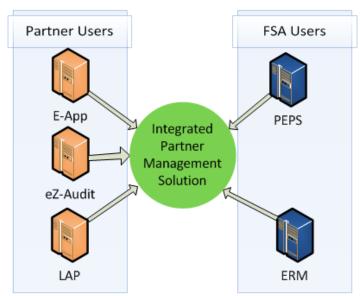
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Integrated Processes

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

Partner Users → IPM ← FSA Users

Partner Users cloud: Mail, Paper Processes, LAP, eZ-Audit, E-App

FSA Users cloud: PEPS, ERM, Paper Processes, Mail

IPM

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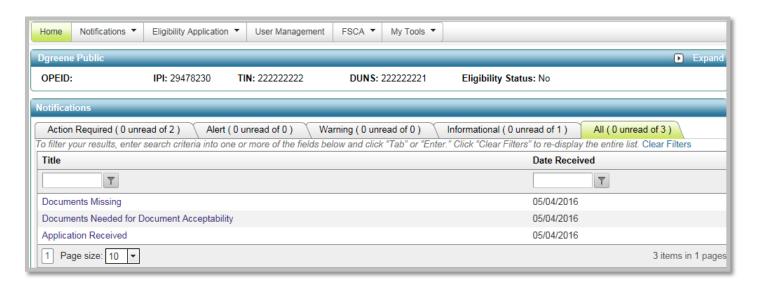
Integrated Processes

- 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
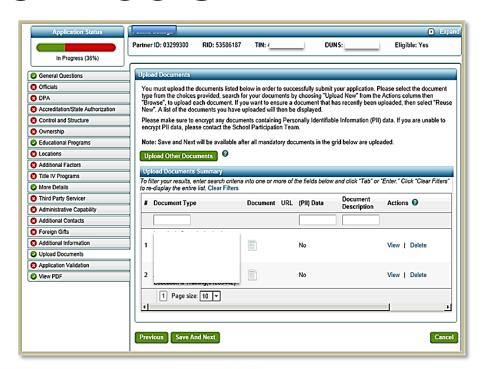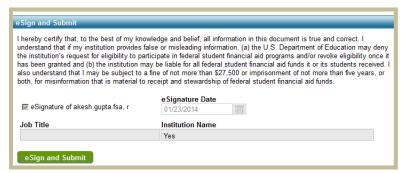   - PEPS – Postsecondary Education Participants System

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Partner Portal

- Home Page

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Partner Tools

- Intuitive Navigation

- Skip Logic/Automated Workflow

- Document Upload/Digitized Documents

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Partner Tools

- E-sign and Submit

- Submission Confirmation

Partner Tools

- Manage Users
  - Create
  - Edit
  - Deactivate

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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

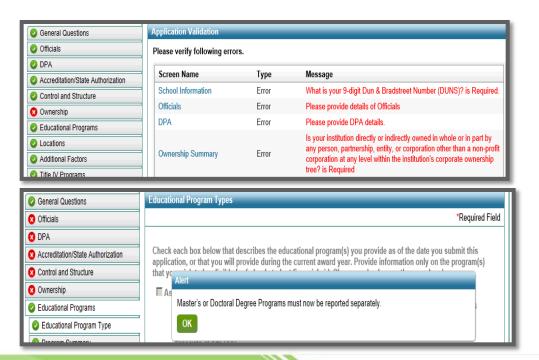| Title	Date Received
Documents Missing	05/04/2016
Documents Needed for Document Acceptability	05/04/2016
Application Received	05/04/2016
1 Page size: 10	3 items in 1 pages

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Partner Portal

- Partner Summary

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Integrated Communication

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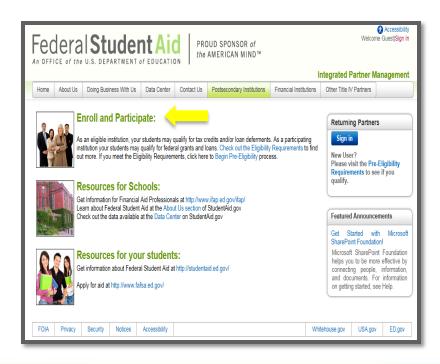 - Help Text and Alerts

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New User Access

- New partners will go through the IPM enrollment process

- Initial application does not require user credentials

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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

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New User Access

- New User Enrollment and Resources

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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

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Existing User Access

- Returning Partner Login

- Featured Announcements

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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

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Questions and Comments

- Submit questions and comments to:

  IPMQuestions@ed.gov

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QUESTIONS?

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