BREAKOUT SESSION #25

FSA Partner Connect Preview

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U.S. Department of Education
2020 Virtual FSA Training Conference for Financial Aid Professionals
INTRODUCING FSA PARTNER CONNECT
NEW DIGITAL SITE FOR PARTNERS

Launching in March 2021 at fsapartners.ed.gov

FSA Partner Connect features:

• A **new homepage** with links to FSA sites such as E-App, COD, and NSLDS, etc.

• A new **Knowledge Center** (previously IFAP) and a redesigned **FSA Handbook**

• Customized **partner dashboards**

• **School profiles**

• **Student, parent, borrower accounts**

• **StudentAid.gov student view**
NAVIGATING
FSA PARTNER
CONNECT
Header and Footer for navigation and access to other FSA sites

Knowledge Center, formerly IFAP, is featured prominently on the homepage for the public searching for Title IV guidance or policy

Quick Links provides easy access to FSA’s most frequently used sites by partners
Log In, provides access to functionality requiring authentication

Important Dates, highlights upcoming relevant dates for partners

What’s New, highlights the most recent Dear Colleague Letters

FSA Twitter, a consolidated list of Tweets from FSA’s Twitter accounts - @fafsa, @FSACOO, and @FSAConf

Help Center, provides assistance, FAQs, and customer service
# PARTNER CONNECT – NAVIGATION LINKS

*Easy access to 15+ existing FSA websites used by partners today*

<table>
<thead>
<tr>
<th>Knowledge Center</th>
<th>Training</th>
<th>Financial Aid Delivery</th>
<th>Title IV Program Eligibility</th>
<th>Partner Connect Services</th>
</tr>
</thead>
</table>
| Knowledge Center FAQs | Financial Aid Toolkit financialaidtoolkit.ed.gov | • Origination & Disbursement  
• Campus-Based Processing  
• Return of Title IV Funds cod.ed.gov | Audit Submission ezaudit.ed.gov |  |
| National Student Loan Data System nslds.fafap.ed.gov/fap | Appeals ecdrappeals.ed.gov |  |  |  |
| Reconciliation & Closeout www.g5.gov | Cybersecurity |  |  |  |
| Default Prevention and Management dmc.ed.gov | School Closures |  |  |  |

The following FSA websites are also accessible from Partner Connect

- SAIG Enrollment fsawebenroll.ed.gov
- SAIG Mailbox saigportal.ed.gov
- Experimental Sites experimentalsites.ed.gov
- Loan Servicing for Schools
HELP CENTER

• Contact Customer Support
• FSA Partner Connect FAQ
• FSA Customer Service Centers
• Helpful Links
• Access to FSA Systems
• Mailing Lists and Listservs
KNOWLEDGE CENTER

Replaces the IFAP website

- Updated design and simplified layout
- Streamlines the organization of resources and information articles
- Improved search capabilities for more relevant search results
Key sections include:

- What’s New
- Featured Information
- Quick Reference
- Library
- Topics
- Laws and Regulations
- Knowledge Center Subscriptions
Search and Advanced Search capabilities have been updated to provide better results.

Search now includes “Type-Ahead” and “Popular Topics” search capabilities as well as search tips.
KNOWLEDGE CENTER ARTICLES

• Layout of articles are more user-friendly
• Attachments are easily accessible prominently on the page
• Posted Date is included as well as a “Last Modified” date
FSA HANDBOOK

- Available through the Knowledge Center
- Handbook volume and chapters presented in an interactive HTML design
- Enhanced search capabilities
- Handbook content now includes an “Originally Published” date and “Last Modified” date
Prior versions of the Handbook as well as Foreign Schools Handbook are in one central place.

Prior versions of the handbook available in PDF.
The complete Handbook can be downloaded into PDF.

Volumes and chapters can also be downloaded into PDF.
• Updates and changes to the Handbook are documented in the Errata and Updates section
PARTNER DASHBOARDS

Partner Connect Feature
PARTNER DASHBOARD

• An intuitive, user friendly dashboard displayed upon login

• Tailored information based on partner type and user role
  • School notifications
  • Scheduled system outages
  • Snapshots of high-level operational data, as well as FAFSA, Perkins, and Campus Based data, if applicable
  • Important Dates, What’s New, FSA Twitter
  • Links to frequently used systems
PARTNER DASHBOARD

Dashboard View with Notifications

- When applicable, notifications will be displayed on the Dashboard with specific details
PARTNER PROFILES:
SCHOOLS

Partner Connect Feature
PARTNER PROFILE: SCHOOL PROFILE

- User-friendly view of all school information
- Consolidates school profile information that exists in the School File with additional data from COD
- Public school profile information is viewable by all users. Users with an association to a school have access to additional school information
- Users can open each accordion individually or “Expand All”
SCHOOL PROFILE
SEARCH

• Search for a School Profile by -
  • School Identifier (OPEID, Pell ID, DUNS #, etc.)
  • School Name
  • Location (State, City)

• Search results include OPEID, Name, City and State.

Look for the Institution Icon to view the OPEID and other associated identifiers.
School Profile Details

- School Profile includes School Background, School Financial Information, and Relationships sections.
- The School Profile page also has school general information and main campus information.
The School Profile page also contains program eligibility details and experiment eligibility, if applicable.
STUDENT, PARENT AND BORROWER ACCOUNTS

Partner Connect Feature
STUDENT, PARENT, BORROWER ACCOUNTS

- A comprehensive view of FSA customer accounts within FSA Partner Connect
  - Demographic Information
  - StudentAid.gov Preferences
  - Award Summary
  - Summary ISIR Information
  - Lifetime Eligibility Information
  - SULA Information
  - Counseling Record History
  - MPN and ATS Information
  - PLUS Loan Applications
  - Endorser Addendums
  - Credit Check
  - Default Status
STUDENT, PARENT, BORROWER ACCOUNTS

Search for accounts by:

- Social Security Number; partners are required to enter a 9-digit number for an SSN search

OR

- Date of Birth and Name; partners must enter at least a first or last name

Look for the Eye Icon to mask or unmask SSN
### Search Results

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<tr>
<th>SSN</th>
<th>Full Name</th>
<th>Date of Birth</th>
<th>Email</th>
<th>City</th>
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STUDENT, PARENT, BORROWER ACCOUNTS

- Date Range Search is available for the following:
  - Counseling Records
  - Master Promissory Notes (MPNs)
  - Agreement to Serve (ATS) Documents
  - PLUS Loan Applications
STUDENTAID.GOV
STUDENT VIEW

Partner Connect Feature
STUDENTAID.GOV

STUDENT VIEW

• Allows schools to view what FSA customers are seeing on StudentAid.gov

• From the Student, Parent, Borrower Account, navigate to a read-only view of StudentAid.gov.
STUDENTAID.GOV STUDENT VIEW

My Enrollment

STUDENT VIEW OPTIONS Aid Summary Enrollment JOHN TRAVELER'S VIEW

Current Enrollment

University of Maryland - College Park

00101010101

CURRENT ENROLLMENT STATUS

Effective Date

Program Enrollment Details

REGISTRATION

SCHEDULE LEVEL

LEAVE DATE

6/01/2017

Pending Enrollment Requests

University of Maryland - College Park

00101010101

Past Program Enrollment

Institutional Code

Program

Graduate Level

Year

Degree Title

Minor

Major

00101010101
ACCOUNT ACCESS MANAGEMENT CENTER

Partner Connect Feature
ACCOUNT ACCESS MANAGEMENT CENTER

All users with a Partner Connect Account can view their account access details and request additional access.
ACCOUNT ACCESS MANAGEMENT CENTER

• Provides user account details

• Users can view access for all affiliated organizations

• Primary and Secondary Administrators email addresses are included for easy reference

• Users can also view their specific access and permissions as well as request additional access
WHAT’S COMING NEXT?
FSA PARTNER CONNECT TRAINING

Training opportunities will be available before and after FSA Partner Connect launch

With the launch of FSA Partner Connect we’re rolling out more comprehensive training and communications!

Partners will be informed and equipped with the tools for success through a series of live webinars, recorded videos, and job aids and tutorials.

Stayed tuned for training communications!
PARTNER EXPERIENCE COUNCIL

Ensuring Next Gen is designed with our partners in mind

FSA has been engaging the Partner Experience Council, a group of partners who have volunteered to share knowledge and experience through surveys, interviews, usability sessions, and focus groups.

The Council members have provided valuable feedback about new features of the partner portal.
JOIN THE PARTNER EXPERIENCE COUNCIL

Submit your interest in joining the Council by scanning the QR code or navigating to the link below!

Link: https://bit.ly/2FMTmMs

Instructions for QR Code:
1. Open the Camera on your smartphone device
2. Hold your device so that the QR code appears in the viewfinder in the Camera app. Your device will recognize the QR code and show a notification
3. Tap the notification to open the survey link associated with the QR code
SHARE YOUR THOUGHTS

Please take a minute to share your initial thoughts on FSA Partner Connect by scanning the QR code!

Instructions for QR Code:
1. Open the Camera on your smartphone device
2. Hold your device so that the QR code appears in the viewfinder in the Camera app.
   Your device will recognize the QR code and show a notification
3. Tap the notification to open the survey link associated with the QR code

Menti Code: 20 30 27 1
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