BREAKOUT SESSION #26

Accessing FSA Partner Connect for Destination Point Administrators

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INTRODUCTIONS

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AGENDA

01 FSA Partner Connect – Account Access Management Center
02 Initial Enrollment, Managing Access, & Enrolling New User for Administrators
03 FSA Partner Connect Enrollment Management Demo
04 What’s Next for FSA Partner Connect
05 Partner Experience Council
FSA PARTNER CONNECT

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
- Partner profiles
- Student, parent, borrower accounts
- StudentAid.gov student views
ACCOUNT ACCESS MANAGEMENT CENTER
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
An administrator can enroll and manage access for all users within their organization.

Existing Primary & Secondary Destination Point Administrators will serve as administrators in Partner Connect.
Administrators and Initial Enrollment

FSA PARTNER CONNECT
INITIAL ACCESS TO FSA PARTNER CONNECT

Primary/Secondary Administrators will be responsible for enrolling and managing the users/accounts at their organizations.

1. RECEIVE AN EMAIL

Primary and Secondary Administrators will receive an email prior to go-live with the instructions for accessing FSA Partner Connect.

2. LOG INTO FSA PARTNER CONNECT

Upon login Primary and Secondary Administrators will see a list of users ‘potentially affiliated’ with their organization.

3. GRANT ACCESS

Primary and Secondary Administrators will select users and grant them appropriate level of access.
Administrators and Enrolling New Users

FSA PARTNER CONNECT
To add a new user to your organization, enter their first and last name and business email address.
ENROLL A NEW USER

2 Access

All school users will receive the same level of basic access and administrators can determine if additional access is needed for the user.
ENROLL A NEW USER

3 Review and Submit

The final step to initiate a new user is to review the inputted information, and electronically sign to submit the form.
Administrators and Managing Access

FSA PARTNER CONNECT
ADMINISTRATORS
MANAGE ACCOUNTS

- View and manage all accounts from the “Manage Organization Accounts” tab
- Easily search or filter account lists
- Review user account status
- Add New Users
- Modify or remove account access
- Export accounts lists to CSV file
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
WHAT’S COMING NEXT?
FSA PARTNER CONNECT TRAINING

Training opportunities will be available in 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

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PRESENTER CONTACT INFORMATION

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