

# GENERAL SESSION #8

FSA Next Gen Introduces FSA Partner Connect

*Robin Minor, Shamarli Kollock, and Amber Johnson*

*U.S. Department of Education*

*2020 Virtual FSA Training Conference for Financial Aid Professionals*

# INTRODUCTIONS

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GS8 presenters include Robin Minor, Shamarli Kollock, and Amber Johnson.

**ROBIN MINOR**

**DEPUTY CHIEF  
OPERATING  
OFFICER**



**SHAMARLI KOLLOCK**

**PROGRAM MANAGER**



**AMBER JOHNSON**

**TRAINING LEAD**

# AGENDA

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- 01 Partners & Current Challenges
- 02 Partner Experience Vision
- 03 Introducing FSA Partner Connect
- 04 Partner Experience Council and Usability Reviews
- 05 What's Coming Next?



# PARTNERS

*Responsible for the on-the-ground administration of federal student aid programs*

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## SCHOOL PARTNERS

- Schools – Public, Private, Proprietary, Foreign
- Third Party Servicers
- State Agencies
- Accrediting Agencies
- Third Party Software Providers

## FINANCIAL PARTNERS

- Guaranty Agencies
- Federal Loan Servicers
- Federal Family Education Loan (FFEL) Lenders and Lender Servicers
- Private Collection Agencies

# OUR PARTNERS' WORK

*Deliver federal student aid and safeguard data integrity*



**\$121.8 billion** in  
Title IV aid  
delivered to over **10  
million** students <sup>1</sup>



**18 million** total *Free  
Application for  
Federal Student Aid  
(FAFSA®)* forms  
processed <sup>1</sup>



Maintaining rigorous  
**cybersecurity  
standards** to continue  
protecting the sensitive  
information of students,  
parents, and borrowers

1. "Federal Student Aid Fiscal Year 2019 Annual Report," U.S. Department of Education, accessed October 1, 2020, <https://www2.ed.gov/about/reports/annual/2019report/fsa-report.pdf>.

# PARTNER CHALLENGES

*FSA consulted with 150+ schools/organizations to evaluate the current partner experience.*

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## MULTIPLE SITES AND SYSTEMS

- **15+** websites accessed by partners on regular basis
- System access not centralized or similar



## FRAGMENTED ASSISTANCE

- **15+** different customer service options for help
- **4** websites for training information



## SUBSTANTIAL WAIT TIMES AND MANUAL PROCESSES

- **30** weeks to complete re-certification process
- **5+** months for approval to add a new program

# UNDERSTANDING THE CURRENT EXPERIENCE

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## FOCUS GROUPS & INTERVIEWS

- Over a **dozen** focus groups in the last two years
- Over **100** hours of interviews



## SURVEYS

- Over **1,000** responses to the *Annual School Partners Survey*
- **Additional surveys** to the Partner Experience Council as well as FSA staff that collaborate closely with schools



## PROTOTYPES

- Developed prototypes and conducted in person walk throughs with over **300 partners** to gather feedback



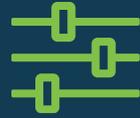
**WE HEARD YOU AND WE LISTENED...**

# THE PARTNER EXPERIENCE VISION



## MODERNIZE TECHNOLOGY

- ❖ Establish a single front door for all partner interactions with FSA
- ❖ Modernize multiple FSA systems and streamline business processes and administrative tasks



## PROACTIVELY MONITOR & ENGAGE

- ❖ Proactively monitor partner data and performance
- ❖ Use data insights to prioritize partner engagement



## EMPOWER PARTNERS

- ❖ Empower partners with tools and resources for self-support and customer service
- ❖ Increase FSA's capacity to engage with schools in need



## IMPROVE STUDENT OUTCOMES

- ❖ Improve student outcomes through effective and efficient aid administration by partners and FSA staff

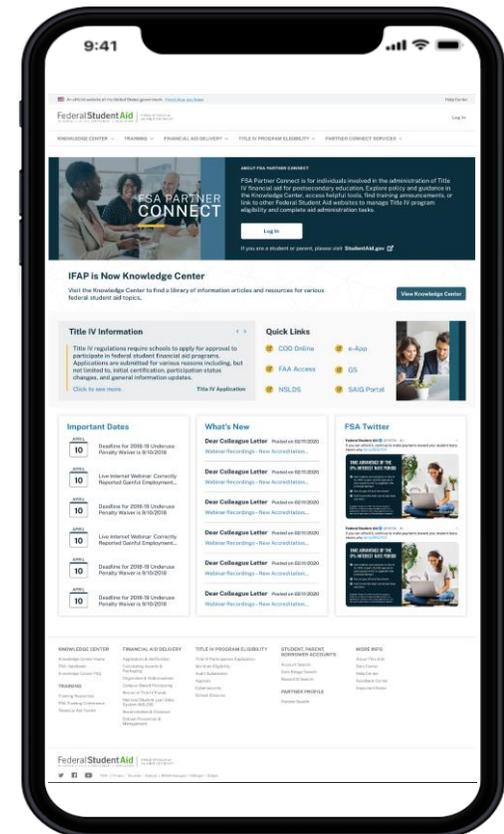
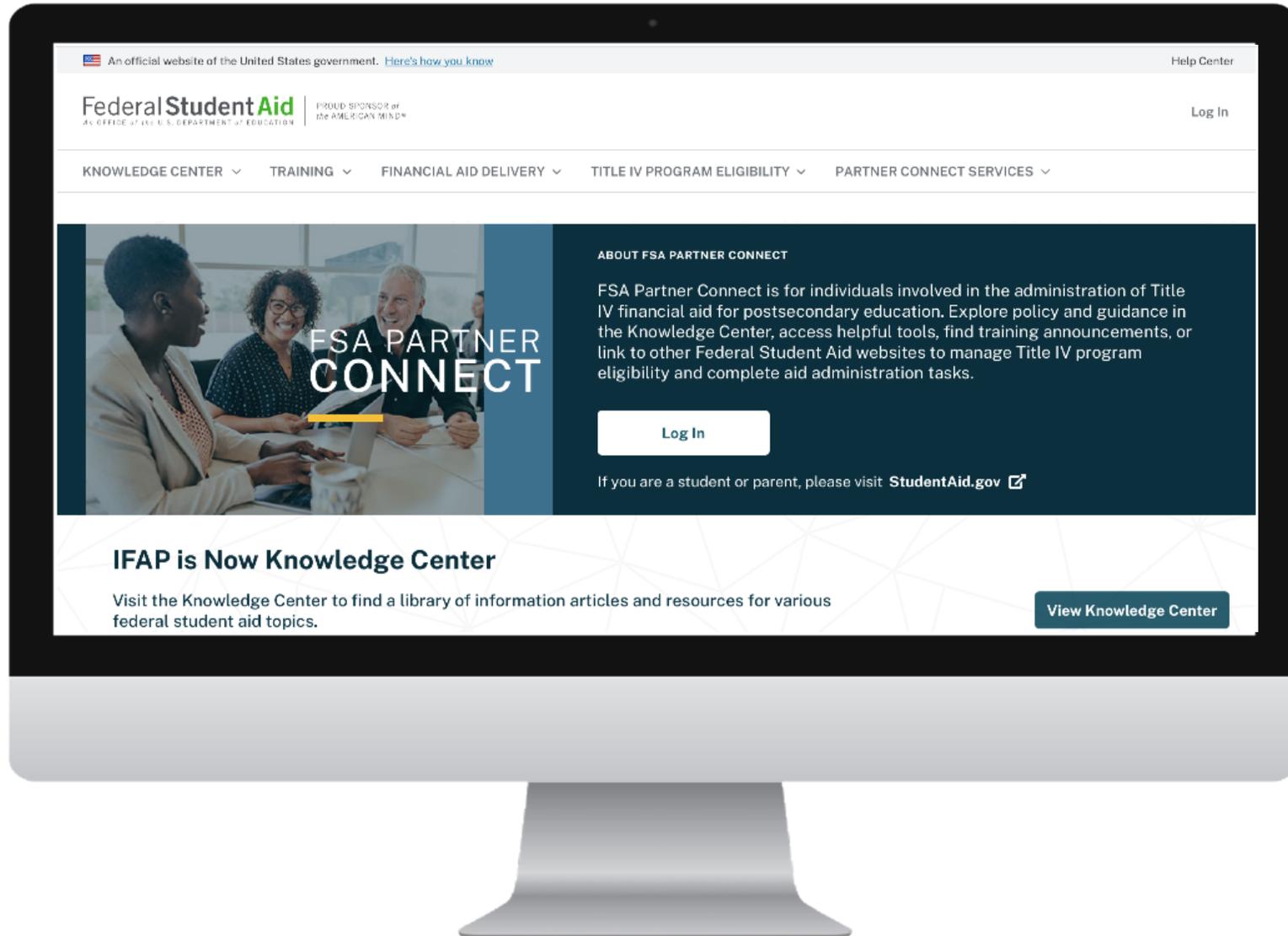
**WE'VE BEEN BUSY!**

**INTRODUCING...**

**FSA PARTNER CONNECT**

**COMING MARCH 2021**

# INTRODUCING FSA PARTNER CONNECT



# NEW DIGITAL SITE FOR PARTNERS

*Launching in March 2021 at [fsapartners.ed.gov](https://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**

The screenshot shows the top of the Federal Student Aid website. At the top left, it says "An official website of the United States government. Here's how you know" with a small American flag icon. To the right is a "Help Center" link. Below this is the "Federal Student Aid" logo, with "FEDERAL SPONSOR OF THE AMERICAN MIND" underneath. A navigation bar contains several dropdown menus: "KNOWLEDGE CENTER", "TRAINING", "FINANCIAL AID DELIVERY", "TITLE IV PROGRAM ELIGIBILITY", and "PARTNER CONNECT SERVICES". Below the navigation is a large banner for "FSA PARTNER CONNECT". The banner features a photo of three people in a meeting. Text on the right of the banner reads: "ABOUT FSA PARTNER CONNECT", "FSA Partner Connect is for individuals involved in the administration of Title IV financial aid for postsecondary education. Explore policy and guidance in the Knowledge Center, access helpful tools, find training announcements, or link to other Federal Student Aid websites to manage Title IV program eligibility and complete aid administration tasks." Below this text is a "Log In" button. At the bottom of the banner, it says "If you are a student or parent, please visit [StudentAid.gov](https://StudentAid.gov)". Below the banner is a section titled "IFAP is Now Knowledge Center" with a "View Knowledge Center" button. To the right of this section is a "Quick Links" area with icons and text for "COD Online", "e-App", "FAA Access", "G5", "NSLDS", and "SAIG Portal".

This screenshot shows the content area of the website. On the left is an "Important Dates" section with a list of dates: "APRIL 10" (Deadline for 2018-19 Underuse Penalty Waiver is 9/10/2018), "APRIL 10" (Live Internet Webinar: Correctly Reported Gainful Employment...), "APRIL 10" (Deadline for 2018-19 Underuse Penalty Waiver is 9/10/2018), "APRIL 10" (Live Internet Webinar: Correctly Reported Gainful Employment...), and "APRIL 10" (Deadline for 2018-19 Underuse Penalty Waiver is 9/10/2018). In the middle is a "What's New" section with four "Dear Colleague Letter" entries, each dated "Posted on 02/11/2020" and titled "Webinar Recordings - New Accreditation...". On the right is an "FSA Twitter" section showing a tweet from @FAFSA about a 0% interest rate period. The tweet text includes: "Federal Student Aid @FAFSA · 4h If you can afford it, continue to make payments toward your student loans. Here's why: [bit.ly/3hNJTCX](https://bit.ly/3hNJTCX)". Below the tweet is a graphic with the text "TAKE ADVANTAGE OF THE 0% INTEREST RATE PERIOD" and bullet points: "Once interest accrued prior to March 01, 2020 is paid, the full amount of your payments will be applied to the principal balance.", "We can pay off your loan faster.", and "You'll lower the total cost of your loan over time." Below the graphic is another tweet from @FAFSA with the same text.

## Knowledge Center Home

[Advanced Search](#)

### ★ What's New

[Subject Title - Example with an Extra Long Title That Wraps to Two Lines Because It Is Long](#)

AUGUST 10, 2021

[Subject Title - Example with an Extra Long Title That Wraps to Two Lines Because It Is Long](#)

AUGUST 3, 2021

[Subject Title - Example with Short Title](#)

JULY 10, 2021

[Subject Title - Example with Short Title](#)

JULY 1, 2021

[Subject Title - Example with an Extra Long Title That Wraps to Two Lines Because It Is Long](#)

JUNE 23, 2021

[View All Recent Posts](#)

### 🔗 Featured Information

[COVID-19](#)

[2020 Virtual FSA Training Conference](#)

[Program Integrity Information - Questions and Answers](#)

[Federal Student Aid Data Center](#)

[Disaster Assistance](#)

### ⚡ Quick Reference

[FSA Handbook](#)

[Dear Colleague Letters](#)

[Knowledge Center FAQ's](#)

[Electronic Announcements](#)

[RSS Feed](#)

[Foreign Schools Updates](#)

### 📖 Library

This is sample description text for the Knowledge Center Library. Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.

#### ★ Resource Type

This is sample description text for the Knowledge Center Program Library. Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.

#### Program

This is sample description text for the Knowledge Center Program Library. Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.

#### System

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#### Functional Area

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# FSA PARTNER CONNECT FEATURES



## KNOWLEDGE CENTER & FSA HANDBOOK

A redesign of the existing IFAP site and FSA Handbook to improve search and site performance, modernize design and layout, and improve user experience

# FSA PARTNER CONNECT FEATURES



## PARTNER DASHBOARD

An intuitive, user friendly dashboard to be displayed upon login that includes partner metrics, notifications, and news that will be tailored to users based on their role

An official website of the United States government. [Here's how you know](#)

Federal Student Aid | PROUD SPONSOR of the AMERICAN MIND®

Marisol | School User | Northwestern University

KNOWLEDGE CENTER | TRAINING | FINANCIAL AID DELIVERY | TITLE IV PROGRAM ELIGIBILITY | PARTNER CONNECT SERVICES

**MH** Welcome, Marisol Last Log In: 06/06/2020

Northwestern University – 12345600

Financial Aid Administrator 6 Years in Financial Aid [Edit](#)

[COD Online](#) [E-App](#)

[FAA Access](#) [G5](#)

[NSLDS](#) [SAIG Portal](#)

School Notifications [>](#)

Scheduled System Outages [🔗](#) < Previous Next >

**CURRENT**

**NSLDS**

Start 01/01/2020 at 8:50 AM

End 01/02/2020 at 8:50 AM

**UPCOMING**

**FAA Access**

Start 01/01/2020 at 8:50 AM

End 01/02/2020 at 8:50 AM

Important Dates [🔗](#)

**APRIL 10** Deadline for 2018-19 Underuse Penalty Waiver is 9/10/2018

**MAY 26** Live Internet Webinar: Correctly Reported Gainful Employment...

**JUNE 3** Deadline for 2018-19 Underuse Penalty Waiver is 9/10/2018

**JULY 14** Deadline for 2018-19 Underuse Penalty Waiver is 9/10/2018

School Financials and Operations [🔗](#) [View School Profile](#)

Select Award Year  2020 – 2021  2021 – 2022

Direct Loan  Pell  IASG  TEACH

**100,000,000** Awards Originated

**90,000,000** Funded Disbursements

**1,000,600,000** Unduplicated Recipients

**\$1,000,600,000** Total Value of Awards Originated

**\$1,000,600,000** Total Value of Funded Disbursements

**\$90,000,000** Total Net Drawdowns

	Direct Loan	Pell Grant	IASG	TEACH Grant
COUNT OF AWARDS ORIGINATED	60,000	60,000	60,000	60,000
VALUE OF AWARDS ORIGINATED	\$4,000,000.00	\$4,000,000.00	\$4,000,000.00	\$4,000,000.00
COUNT OF FUNDED DISBURSEMENTS	55,000	55,000	55,000	55,000
VALUE OF FUNDED DISBURSEMENTS	\$560,000.00	\$560,000.00	\$560,000.00	\$560,000.00
TOTAL NET DRAWDOWNS	\$4,000,000.00	\$4,000,000.00	\$4,000,000.00	\$4,000,000.00
UNDULICATED RECIPIENT COUNT	23,000	23,000	23,000	23,000

What's New [🔗](#)

**Dear Colleague Letter**  
Posted on 02/11/2020  
[Webinar Recordings – New Accreditation Regulations](#)

**Electronic Announcement**  
Posted on 02/11/2020  
[TEACH Grant Closeout Information for 2019 – 2020...](#)

**Dear Colleague Letter**  
Posted on 02/11/2020  
[Webinar Recordings – New Accreditation Regulations](#)

**Dear Colleague Letter**  
Posted on 02/11/2020  
[Webinar Recordings – New Accreditation Regulations](#)

Free Application for Federal Student Aid (FAFSA) Information [🔗](#)

Select Award Year  2020 – 2021  2021 – 2022

TOTAL COUNT OF ISIRS	TOTAL UNDULICATED APPLICANTS	UNDULICATED PELL ELIGIBLE APPLICANTS	UNDULICATED APPLICANTS SELECTED FOR VERIFICATION
1,000,000,000	1,000,000,000	1,000,000,000	1,000,000,000

FSA Twitter [🔗](#)

Federal Student Aid @FAFSA · 4h  
If you can afford it, continue to make payments toward your student loans. Here's why: [@FAFSA](#)

TAKE ADVANTAGE OF THE 0% INTEREST RATE PERIOD

📌 This limited period ends today. To qualify for this benefit, you must have your loan payments made on time for the entire 12-month period of the benefit.

📌 This is part of the American Rescue Plan Act of 2021.

📌 For more information, visit [fafsa.gov](#).

# FSA PARTNER CONNECT FEATURES



## STUDENT, PARENT, BORROWER SEARCH

A comprehensive and consolidated view of student/parent/borrower information

An official website of the United States government. [Here's how you know](#) Help Center

Federal Student Aid AN OFFICE OF THE U.S. DEPARTMENT OF EDUCATION PROUD SPONSOR OF THE AMERICAN MIND™ Alexander | School User | Northwestern University

KNOWLEDGE CENTER ▾ TRAINING ▾ FINANCIAL AID DELIVERY ▾ TITLE IV PROGRAM ELIGIBILITY ▾ PARTNER CONNECT SERVICES ▾

### Student, Parent or Borrower Profile

[StudentAid.gov Student View](#)

**Alexander Hamilton**

**SOCIAL SECURITY NUMBER**      **DATE OF BIRTH**  
 \*\*\*-\*\*-6789      12/29/1997

**CONTACT INFORMATION**      **MAILING ADDRESS**  
 Day: (123) 555-1234      123 College Street  
 Evening: (123) 555-1234      Suite 502  
 Mobile: (123) 555-1234      Evanston, IL 60201  
[Alexander.Hamilton1755@AmericanRevolution.edu](mailto:Alexander.Hamilton1755@AmericanRevolution.edu)      United States of America  
[Alexander.Hamilton@ColumbiaCollege.com](mailto:Alexander.Hamilton@ColumbiaCollege.com)

**Award Summary**

**Summary ISIR Information**

**Lifetime Eligibility Used (LEU) Information**

**Subsidized Usage Limit Applies (SULA) Information**

**Counseling Record History**

**Annual Student Loan Acknowledgements (ASLA)**

**Master Promissory Notes (MPN) and Agreements To Serve (ATS)**

**PLUS Loan Applications**

**Endorser Addendums**

**Credit Check**

**Default Status**

**Student, Parent or Borrower Information** [View Person History](#)

**CITIZENSHIP**      **ALIEN REGISTRATION NUMBER**      **DRIVER'S LICENSE STATE**  
 U.S. Citizen      N/A      New York

**DRIVER'S LICENSE NUMBER**      **POST 9/11 DECEASED VETERAN DEPENDENT**      **SUBSIDIZED USAGE LIMIT APPLIES (SULA) DATE**  
 4566453      No      MM/DD/YYYY

**DL ENTRANCE COUNSELING**      **DL ENTRANCE COUNSELING WITH PLUS**      **SCHOOL ASSIGNED ID**  
 Not on File      Completed      12343278

**PREVIOUS SSN**      **PREVIOUS DATE OF BIRTH**  
 \*\*\*-\*\*-6780      12/28/1997

**StudentAid.gov Preferences**

**LANGUAGE PREFERENCE**      **STUDENTAID.GOV EMAIL**  
 English      [Alexander.Hamilton@ColumbiaCollege.com](mailto:Alexander.Hamilton@ColumbiaCollege.com)

**E-CORRESPONDENCE PREFERENCE**      **EMAIL NOTIFICATIONS**      **TEXT MESSAGE NOTIFICATIONS**  
 Opted In      Opted Out      Opted In

**Award Summary** [View](#) Select Award Year: 2020 - 2021 ▾

	OPEID	Award ID	Servicer Name	Amount Awarded	Amount Disbursed
Direct Loan Total	--	--	--	\$10,100	\$10,100
DL Subsidized Total	--	--	--	\$3,100	\$3,100
<b>Award Detail</b>	<a href="#">1234329</a>	123456789S09123456001	Netnet	\$3,100	\$3,100
DL Unsubsidized Total	--	--	--	\$7,000	\$7,000
<b>Award Detail</b>	<a href="#">1234328</a>	123456789U09123456002	Maximus Federal Services, Inc.	\$7,000	\$7,000
DL PLUS Total	--	--	--	--	--
Pell Total	--	--	--	\$4,000	\$4,000

# FSA PARTNER CONNECT FEATURES

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## PARTNER PROFILE

A search capability for partner profile information that exists in FSA's School File consolidated with additional data from COD



## STUDENTAID.GOV STUDENT VIEW

Provides read-only insight into what students, parents, and borrowers are seeing when interacting with the StudentAid.gov site

# FSA PARTNER CONNECT TRAINING

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

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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!*



**WE'RE STILL LISTENING...**

# PARTNER EXPERIENCE COUNCIL

*Ensuring Next Gen is designed with our partners in mind*

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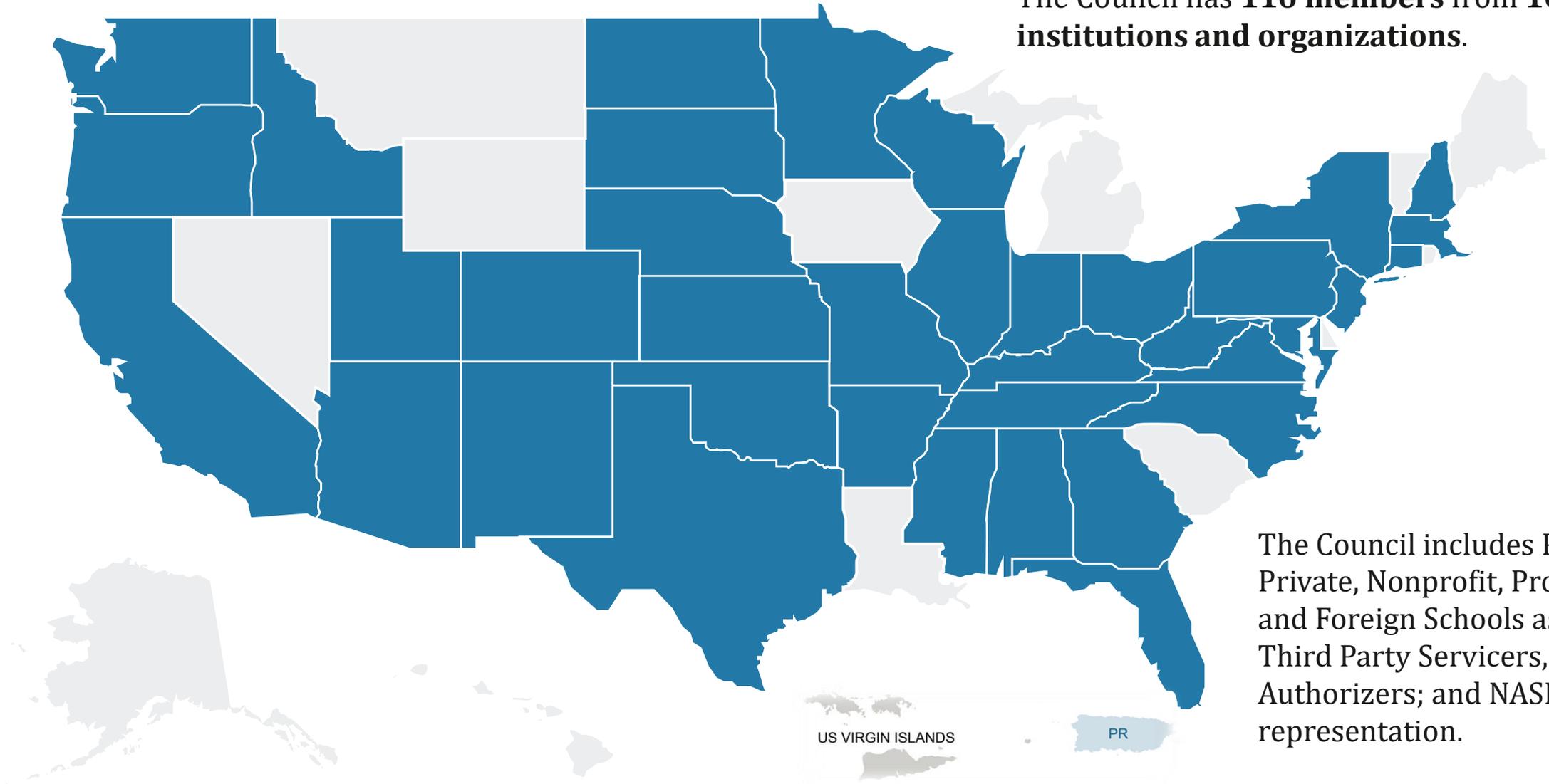
FSA has been engaging the **Partner Experience Council**, a group of partners who have volunteered to share knowledge and experience through surveys, interviews, usability sessions, and focus groups.

The Council members have provided valuable feedback about new features of the partner portal.



# COUNCIL MEMBERS FROM ACROSS THE NATION

The Council has **116 members** from **108 institutions and organizations**.



The Council includes Public, Private, Nonprofit, Proprietary, and Foreign Schools as well as Third Party Servicers, State Authorizers; and NASFAA representation.

# 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**



Thank you for being so proactive about gathering financial aid administrator feedback! I haven't had the opportunity to provide this level of feedback in my entire career. Your efforts to keep administrators aware of upcoming changes, solicit feedback, and simplify our work have not gone unnoticed.

**Partner Experience Council Member**

# USABILITY REVIEWS

Throughout the summer, FSA has been engaging the Partner Experience Council in Usability Reviews to collect feedback on elements of FSA Partner Connect.

8 USABILITY REVIEW  
SESSIONS  
CONDUCTED,  
TOTALING 12+ HOURS  
OF DISCUSSION



50+ SCHOOLS /  
ORGANIZATIONS  
REPRESENTED IN  
USABILITY REVIEW  
SESSIONS



50+ ENHANCEMENTS  
IMPLEMENTED AS A  
RESULT OF PARTNER  
FEEDBACK

*“A central location for all things FSA would be amazingly beneficial for our FA offices, which impacts our capacity to interact with our students.”*

*“I like this more modern search option; I like the ease of use.”*

*“I really like being able to see this information so easily.”*

## EARLY PARTNER CONNECT FEEDBACK

*“The difference between the old FSA handbook option and this is night & day. This is a HUGE improvement, and I can’t thank FSA enough...”*

*“I love that you don’t have to hop around to different areas and can pull student information once and then review all components needed.”*

# WHAT'S COMING NEXT?

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# LOOKING AHEAD

## *What's Next?*

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Next Gen includes even more improvements for partners! Our next set of major enhancements include:

- ❖ **Redesign of the institutional eligibility application (e-App)** which facilitates initial approval to participate; changes to ownership or structure; recertification; reinstatements, etc.
- ❖ **Reengineering of the Postsecondary Education Participants System (PEPS)**, which maintains eligibility, certification, demographic, financial, review, audit and default rate data about schools, lenders, and guarantors participating in the Title IV programs.



# LEARN MORE



# CONFERENCE SESSIONS

*Learn more about FSA Partner Connect this week!*

Session No.	Session Name	Date	Time
B025	<b>FSA Partner Connect Preview</b>	Wednesday	4:30 – 5:15 p.m.
B026	<b>Accessing FSA Partner Connect for Destination Point Administrators</b>	Friday	11:15 – 11:45 a.m.
Resource Center	<b>Feature Demos</b> <ul style="list-style-type: none"> <li>• Knowledge Center (Formally IFAP)</li> <li>• FSA Handbook</li> <li>• Partner Dashboard</li> <li>• Partner Profile</li> <li>• Student, Parent, Borrower Accounts and StudentAid.gov View</li> </ul>	<i>Available on Demand</i>	
	<b>FSA Partner Connect Q &amp; A</b>	Tuesday	3:00 – 5:00 p.m.
		Wednesday	2:30 – 4:30 p.m.
		Thursday	3:00 – 5:00 p.m.
		Friday	12:30 – 2:30 p.m.

# SHARE YOUR THOUGHTS

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

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## 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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## PRESENTER CONTACT INFORMATION

**ROBIN MINOR**

*Robin.Minor@ed.gov*

**SHAMARLI KOLLOCK**

*Shamarli.Kollock@ed.gov*

**AMBER JOHNSON**

*Amber.Johnson@ed.gov*

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