

## **New Third-Party Servicer Inquiry Form Questions Implemented in FSA Partner Connect – Dec. 17, 2023**

The Third-Party Servicer Inquiry Form has been revised to request and document the following additional information about any third-party servicer that administers one or more aspects of the administration of the *Title IV*, HEA programs on a school's behalf. This information was not previously part of the Third-Party Servicer Inquiry Form and must be updated the first time a user submits a Third-Party Servicer Inquiry Form via FSA Partner Connect, regardless of the reason for submission. Answers to all the new questions and a review of the full form will be required the first time the Third-Party Servicer Inquiry Form is updated after Dec. 17, 2023, and users will receive an error if the new questions are not answered. After the first Third-Party Servicer Inquiry Form update is submitted, a user will not need to re-answer the new questions unless there is a change to a prior response to one or more of those questions.

The additional information now collected throughout various sections of the Third-Party Servicer Inquiry Form includes:

- Each software system the third-party servicer uses to gather, store, and maintain data it downloads from Department systems, receives from schools, and/or receives from other entities to perform functions on a school's behalf (*see 2 – General Inquiry/Software System(s)*)
- Home address, personal email address, and personal telephone number for the individual who completes the form for the third-party servicer and for the third-party servicer's highest-ranking officer (CEO/COO/President), primary contact, and secondary contact to better facilitate communication in an emergency (*see 4 – Contact Inquiry*)
- Business contact information for the third-party servicer's FSA Partner Connect Eligibility & Oversight Administrator and Alternate Eligibility & Oversight Administrator (*see 4 – Contact Inquiry*)
- Each location at which the third-party servicer provides services to or completes processing for a school to better facilitate communication in an emergency (*see 7 – Location Inquiry*)
- Each subcontractor/affiliate who provides services for the third-party servicer, including upload of a copy of the third-party servicer's contract with the subcontractor/affiliate (*see 9 – Subcontractor/Affiliates Inquiry*)

### **New E-App Questions Third-Party Servicers Must Obtain for School**

If a third-party servicer prepares the Application for Approval to Participate in the Federal Student Financial Assistance Programs (E-App) on behalf of a school, it will need to obtain the following additional information about a school:

- Explanation if an accreditation or state authorization entity has taken any adverse action against the school (*see 3 – Accreditation & State Authorization*)

- Accurate ownership type, additional information about each person owner or entity owner including expanded ownership questions, emergency contact information, related party and entity information needed on a person-by-person basis, other schools owned and past liability at other schools *(see 4 – Owners, Officials, & Administrators)*
- Home address, personal email address, and personal telephone number for the school's officials to better facilitate communication in an emergency *(see 4 – Owners, Officials, & Administrators)*
- Identification of, and business and personal contact information for, the school's chief executive officer, chief operations officer, and/or chief information officer in addition to the school's president, chief financial officer, and financial aid director, along with their effective date in this role *(see 4 – Owners, Officials, & Administrators)*
- Email address and effective date for board members, and their connections to other schools (through ownership or positions held) or third-party servicers owned, and any past liability at those entities *(see 4 – Owners, Officials, & Administrators)*
- Business contact information for the school's FSA Partner Connect Eligibility & Oversight Administrator and Alternate Eligibility & Oversight Administrator *(see 4 – Owners, Officials, & Administrators)*

**Note:** An Alternate Eligibility & Oversight Administrator must be designated.

- Additional questions about a school's locations, including if physical instruction is provided at a location or if the school's location is a prison or jail *(see 5 – Locations & Educational Programs)*
- Additional questions about a school's educational programs, including Standard Occupational Code (SOC), method of delivery, and written arrangements with other entities to provide instruction for each reported educational program *(see 5 – Locations & Educational Programs)*
- More options to report services provided by the school's third-party servicer if it has one *(see 7 – Third-Party Servicer)*

**Note:** This information is different than the third-party servicer authorization action that a school must take as explained in the [Dec. 22, 2023 Electronic Announcement](#).

- Name and address of Ability to Benefit (ATB) test administrator *(see 8 – Ability to Benefit)*