



Federal Student Aid (FSA) Partner Connect:

Third-Party Servicer and School Organization Checkpoint Guide

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Additional Partner Connect Resources



Self-Guided Learning Resources: Additional self-guided learning resources including recorded webinars, job aids, and demos are available at FSATraining.ed.gov.



Visit the Help Center: Access customer support resources at FSAPartners.ed.gov/Help-Center.



Contact Us!: Customer Service Representatives are available Monday-Friday 8:00am to 8:00pm EST at (800) 848-0978 or at fsapartners.ed.gov/help-center/contact-customer-support via the Customer Support Form.

Appendix

This guide is intended to help Third-Party Servicer (TPS) organizations and their associated schools properly set up all necessary connections to complete eligibility and oversight-related case management work in FSA Partner Connect. These important connections must be in place before a TPS organization, or its users can perform any eligibility work on behalf of a school. It can also be used to troubleshoot different connection points that should be confirmed if a TPS user cannot access the Application for Approval to Participate in the Federal Student Financial Assistance Programs (E-App) or TPS Inquiry Form. It is important to note that some connections need be made by the TPS organization and other connections need to be made by the school.

Requisites to Begin

For the purposes of this guide, a few assumptions have been made. Specifically,

- When working with the school, the school user must be the Eligibility and Oversight (E&O) Administrator for the school organization.
- The TPS organization must be an existing TPS, meaning the TPS has completed a TPS Inquiry form, acknowledged by FSA, and was granted access to Partner Connect. If a TPS organization is new or has not yet completed the TPS Inquiry form, please visit - [Third-Party Servicers | Title Iv Program Eligibility \(ed.gov\)](#).
- TPS organization must have an established TPS (E&O) Administrator for their TPS organization.

Connection Checkpoints

This section lists the key connections that must be in place for a TPS user to complete eligibility and oversight-related case management work on behalf of a school in FSA Partner Connect. As noted earlier, some connections need to be made by the school and others need to be made by the TPS organization.

School Connection Checkpoints Summary

- ✓ Have you confirmed that the school E&O Administrator has added the TPS organization to Section J. of the school's Eligibility Application?
 - A. Confirm school Eligibility and Oversight Administrator can access Eligibility Application.
 - B. Confirm that the TPS organization is listed in "Section J. Third-Party Servicers" of the Eligibility Application on the FSA Partner Connect website.
 - **Important Note:** In many cases, the TPS may already be listed on the school's E-App. If so, the school can move on to the TPS Organization Checkpoint below.
 - **Important Note:** School E&O Administrators should not be adding TPS users as [Alternate] E&O Administrators to their Eligibility Application

- ✓ Has the School E&O Administrator added the TPS organization in the Account Access Management Center (AAMC) with the “E-App Case Management (Edit)” access?
 - C. School E&O Administrator confirms that the TPS organization has been added as an Eligibility Servicer in the AAMC with E-App Case Management (Edit) access.

TPS Organization Checkpoints Summary

- ✓ Can your TPS Organization E&O Administrator access the school organization’s E-App?
 - A. TPS E&O Administrator accessing the school’s E-App.
- ✓ Has the TPS E&O Administrator added their additional users for their TPS organization?
 - B. TPS E&O Administrator adding additional TPS users through the AAMC.
- ✓ Has the TPS E&O Administrator granted the TPS additional users “E-App Case Management (Edit)” access for the SCHOOL organization?
 - C. TPS E&O Administrator granting TPS users “E-App Case Management (Edit)” access to the school organization.

School Connection Checkpoint Instructions

A. Confirm School E&O Administrator can access E-App.

1. School organization E&O Administrator successfully logs into FSA Partner Connect using their FSA User ID and Password.
2. School E&O Administrator uses the top navigation menu to access the E-App by selecting Title IV Participation Application under Title IV Program Eligibility.
3. School E&O Administrator selects “Get Started” to access the E-App.
4. School E&O Administrator arrives at the “Reason for Submitting” page prior to entering the E-App.
5. School E&O Administrator selects “Update/Report Information” and chooses TPS from the dropdown picklist that appears in the “What Section(s) will you be updating?” and select “Next”.

B. Confirm that the TPS organization is listed in “Section J. Third-Party Servicers” of the E-App on the FSA Partner Connect website.

1. School E&O Administrator navigates to “Section J. Third-Party Servicers” by using the E-App navigation menu on the left.
2. If the TPS is not listed, the School E&O Administrator selects “Add New”, School E&O Administrator is navigated to “Section J. Add New Third-Party Servicer” page.

3. School E&O Administrator uses the search in question “1. To search for your Third-Party Servicer, enter your servicer’s name in the box below. If your Third-Party Servicer is not found, provide your servicer’s name and contact information” field to locate their TPS.
4. School E&O Administrator confirms the populated fields are accurate. At the bottom of the page, the School E&O Administrator should fill out the “Effective Date” required field prior to selecting “Next”.
5. School E&O Administrator is then navigated to the “Section J. Third-Party Servicer” page to add the service(s) provided by the TPS.
6. School E&O Administrator selects “Add New” to be navigated to “Section J. Add Service Provided”.
7. On the “Section J. Add Service Provided” page, School E&O Administrator adds the Main Service Provided, Specific Service Provided (if requested), and Effective Date.
8. School E&O Administrator selects “Add Service” to complete the addition of the TPS.
9. School E&O Administrator submits E-App in Section Q after reviewing that each field of the application is filled out appropriately.
10. School’s Authorized Signature Authority DocuSigns the E-App to complete the submission to FSA for review.
11. School’s E-App is approved by FSA.

C. School E&O Administrator confirms that the TPS organization has been added as an Eligibility Servicer in the AAMC with “E-App Case Management (Edit)” access.

1. School E&O Administrator successfully logs into FSA Partner Connect using their FSA User ID and Password.
2. School E&O Administrator selects the “Account Access Management Center (AAMC)” from the dropdown in the Person icon in the top-right corner of the screen.
3. School E&O Administrator selects the “Eligibility Servicers” tab in the Account Access Management Center (AAMC) to be on the Manage Organization Relationship page.
4. School E&O Administrator selects “Add Organization” in the top right corner of the Manage Organization Relationship section.
5. School E&O Administrator selects the <TPS Organization> from the Select Organization pop-up window and selects the “Select” button.

Note: If unsuccessful in completing the steps in the Checkpoints, please contact Customer Support via the [FSA Partner Connect Contact Customer Support form](#) or by calling 1-800-848-0978.

TPS Organization Checkpoint Instructions

A. TPS E&O Administrator accessing the school's E-App

Once the TPS organization is listed as having a relationship with a school organization in the school's E-App, the TPS's E&O Administrator receives an email confirming they have access to the school organization. If the TPS E&O Admin has NOT received an email confirming they have access to the school organization, reach out to the school E&O Admin to complete the School Connection Checkpoints.

1. TPS E&O Administrator successfully logs into FSA Partner Connect using their FSA User ID and password.
2. TPS E&O Administrator selects the school organization that has granted them E&O Administrator access from the "Select Organization to Proceed" screen.

Note: Currently, the school list may show two entries for each school the TPS is associated with. Administrators will need to ensure they select the one that has the additional E&O features. To do this, administrators will navigate to the "My Account" tab and check to see the "Case Management – Eligibility and Oversight" access is at the bottom of the table. If not, administrators need to return to the school list and select the other school account. FSA is working on a fix to identify the correct school entry with the E&O features more easily.

3. TPS E&O Administrator confirms the school organization is showing in the top right corner of the web page next to the person icon.
4. TPS E&O Administrator accesses the school's E-App by using to the top navigation menu and selecting Title IV Participation Application under Title IV Program Eligibility.
5. TPS E&O Administrator selects "Get Started" to access the school's E-App.

B. TPS E&O Administrator adding additional TPS users through the AAMC

Note: This checkpoint is designed to confirm that TPS users are already established in FSA Partner Connect at the TPS organization itself and have the appropriate access. If a user is already established in FSA Partner Connect, then the TPS Admin can move on to establishing the user's relationship with the school. Important: This connection can be performed at any point and not dependent on the school-TPS relationship or the school actions noted earlier.

1. TPS E&O Administrator successfully logs into FSA Partner Connect using their FSA User ID and password.
2. TPS E&O Administrator ensures that the organization selected on the "Select Organization to Proceed" screen is the Third-Party Servicer organization (when changing organizations, it is recommended to ensure that the user has cleared their cache to ensure maximum functionality).
3. TPS E&O Administrator selects the "Account Access Management Center (AAMC)" from the dropdown in the Person icon in the top-right corner of the screen.

4. TPS E&O Administrator selects the “My Account” tab to confirm that “E-App Case Management (Edit)” access is listed under the “My FSA Partner Connect Access” section.
5. TPS E&O Administrator navigates to the “Manage Organizations Account” tab and selects “Add New User”.
6. An “Add New User” section appears within the “Manage Organization Accounts” tab. The TPS E&O Administrator completes the User Demographic Information. Once completed, select “Next”.
7. TPS E&O Administrator should complete the “Grant Access” section. Once completed, select “Next”.

Note: *If the user is going to be accessing E-Apps for the schools’ that the Third-Party Servicer has an FSA acknowledged relationship, the TPS E&O Administrator should select the “E-App Case Management (Edit)” checkbox.*

8. TPS E&O Administrator must complete the Review and Submit page. After verifying that the entered information is accurate, the TPS E&O Administrator must review the Rules of Behavior and Privacy Act and acknowledge them before proceeding by selecting the checkbox.
9. Once the above section is complete, the TPS E&O Administrator must enter THEIR OWN Full Legal Name and Date of Submission. Once completed, select “Next”.
10. The new user will be notified via email to log into FSA Partner Connect and complete the Review and Acknowledge page. Once completed, the new user will be able to log into FSA Partner Connect.

C. TPS E&O Administrator granting TPS users “E-App Case Management (Edit)” access to the school organization.

Note: *This checkpoint is designed to confirm that TPS users are authorized to complete E&O work for the school. It must be designated on an individual school basis. Important: This connection can be performed if the school has listed the TPS on their eApp.*

1. TPS E&O Administrator successfully logs into FSA Partner Connect using their FSA User ID and password.
2. TPS E&O Administrator must ensure that the organization selected on the “Select Organization to Proceed” screen is the SCHOOL organization.

Note: *Currently, the school list may show two entries for each school the TPS is associated with. Administrators will need to ensure they select the one that has the additional E&O features. To do this, administrators will navigate to the “My Account” tab and check to see the “Case Management – Eligibility and Oversight” access is at the bottom of the table. If not, administrators need to return to the school list and select the other school account. FSA is working on a fix to identify the correct school entry with the E&O features more easily.*

3. TPS E&O Administrator selects the “Account Access Management Center (AAMC)” from the dropdown in the Person icon in the top-right corner of the screen.
4. TPS E&O Administrator selects the “Current Organization” tab to confirm that “Case Management – Eligibility and Oversight” access is listed under the “My Partner Connect Access” section.
5. TPS E&O Administrator navigates to the “Manage Organizations Account” tab and selects “Add New User”.

Note: *if the user already has an account at the selected school, the E&O Administrator may select the user from the list and grant the user the access listed in step 7.*

6. An “Add New User” section appears within the “Manage Organization Accounts” tab. The TPS E&O Administrator completes the User Demographic Information. Once completed, select “Next”.
7. TPS E&O Administrator should complete the “Grant Access” section. For the additional user to have access to the school’s E-App, the TPS E&O Administrator should select the checkbox titled “E-App Case Management (Edit)”. Once completed, select “Next”.
8. TPS E&O Administrator must complete the Review and Submit page. After verifying that the entered information is accurate, the TPS E&O Administrator must review the Rules of Behavior and Privacy Act and acknowledge them before proceeding by selecting the checkbox.
9. Once the above section is complete, the TPS E&O Administrator must enter THEIR OWN Full Legal Name and Date of Submission. Once completed, select “Next”.
10. The new user will be notified via email to log into FSA Partner Connect and complete the Review and Acknowledge page. Once completed, the new user will be able to log into the school organization’s E-App on FSA Partner Connect.
11. Repeat Steps 2-10 for each school the specific user needs to have “E&O Case Management (Edit)” access to do work on behalf of the school to complete their E-App.

Note: *If unsuccessful in completing the steps in the Checkpoints, please contact Customer Support via the [FSA Partner Connect Contact Customer Support form](#) or by calling 1-800-848-0978.*