
Technical Resources and Assistance



For authoritative guidance on the Federal Student Aid program requirements, schools should refer first to Department of Education publications, and then to broader U.S. Government publications. While nongovernmental organizations and their publications often provide useful information, following the guidance they offer provides no defense in the case of audit and program review findings. This Appendix describes some important Federal Student Aid technical resources for schools.

This chapter is intended for those who are not financial aid professionals. Rather, it is intended for the occasional visitor—non-federal auditors, state auditors, state attorneys general, and business office employees who sometimes need assistance in navigating Federal Student Aid’s offices and websites.

INFORMATION FOR FINANCIAL AID PROFESSIONALS (IFAP)

FSA’s Information for Financial Aid Professionals (IFAP) website consolidates guidance, resources, and information related to the administration and processing of Title IV federal student aid into one online site for use by the entire financial aid community. IFAP contains more information than is presented in this Appendix. You can find IFAP at: <https://ifap.ed.gov>

Below is an overview of the IFAP website. Here, we identify the areas on IFAP most helpful to the business office. You will find the main headings within toolbars at the top and left side of IFAP and within the boxes in the middle of the home page.

The top toolbar contains links to the following subpages of IFAP:

- ◆ **Getting Started**—This section provides an introduction to the IFAP Website for new users and others who want assistance in using IFAP. FSA hopes that it will be particularly helpful to those new to financial aid by showing what information is available and where it can be found. It highlights what you need to know about accessing the many electronic systems that

institutions must use to participate in the Federal Student Aid programs and provides information about obtaining guidance and training in the administration of the programs. On the getting started subpage, you will find subpages on how to navigate IFAP, how to get additional training on FSA programs, how to get access to FSA systems (when appropriate), and how to sign up for FSA informational Listserves.

- ◆ **What's New**—The What's New area on IFAP lists all of the items posted to the IFAP Website within the past 14 days. You may click on each link to access the file directly.
- ◆ **Calendar**—The Federal Student Aid Calendar is a helpful tool to view the current FSA conferences, trainings, deadlines or other events. To view the most recent items posted to the FSA Calendar, please click on “New Calendar Entries” on the Calendar page. By default, this page will display today's calendar items. Click the left or right arrows on the calendar to view items from past or future months. Click a specific date on the calendar/search page to view items relative to that date. If you'd like to narrow your calendar item results further, please use the query tools provided below and click the “VIEW” button.
- ◆ **iLibrary**—The iLibrary page contains a large number of FSA documents, sorted by Program type (i.e. Federal Pell Grant, Direct Loan program, etc), Functional type (Cash Management, Training, Verification, Foreign Schools, etc), and by Document type (Federal Registers, COD documents, etc).
- ◆ **Training**—Federal Student Aid is pleased to provide you with a variety of ways to obtain training on many topics. You can click on one of the 4 catalog boxes to find training by topic, online training through the e-learning catalog, a catalog of instructor-led training, and materials from past presentations. You can also refer to the training announcements and training calendar on this page (see the shaded sections below the four main boxes).
- ◆ **Help**—Here are some helpful tools to help you navigate through the IFAP Web site. If you need further assistance, you may contact the Web Communications Team via e-mail by either using the Feedback page (see the last link to the right in the top IFAP toolbar) or sending an e-mail directly to: ifap@ed.gov.
- ◆ **Feedback**—You may use one of the options on this page to assist you if you have a question related to Federal Student Aid Title IV policy or if you have a question or suggestion about the IFAP Web site or My IFAP.

Other major subpages on IFAP, linked to in the four rectangular boxes below the top IFAP toolbar, include:

- ◆ Tools for Schools;
- ◆ Publications;
- ◆ Worksheets, Schedules and Tables; and
- ◆ Processing Resources

Tools for Schools

On the Tools for Schools page on IFAP, Federal Student Aid offers online training resources to assist those who work with the Title IV federal student aid programs, software and systems.

Examples of tools include:

- ◆ COD Computer-Based Training— Federal Student Aid is in the process of redesigning and replacing all of the Common Origination and Disbursement (COD) Computer Based Training (CBT) modules. In addition, the COD CBT has been moved to the Federal Student Aid E-Training website, <https://fsatraining.ed.gov> (which requires a user login ID and password).
- ◆ Conference Presentations—Here you can find Federal Student Aid presentations given at various conferences.
- ◆ EDEXpress Training—This self-paced online course provides step-by-step lessons on EDEXpress functionality, including software setup for the Pell Grant, Direct Loan, and TEACH Grant modules.
- ◆ FSA Assessments—FSA Assessments helps schools with compliance and improvement activities and contains links to applicable laws and regulations.
- ◆ Net Price Calculator—Each postsecondary institution that participates in Title IV federal student aid programs must post a net price calculator on its website to provide estimated net price information to current and prospective students and their families based on a student’s individual circumstances.

- ◆ Financial Literacy Guidance—is designed to help counselors and mentors assist postsecondary students with developing the skills necessary to make informed financial decisions—especially in regard to the student loan process. Financial literacy education can provide an understanding of how to manage personal finances, establish financial goals, and form a plan to reach them. Topics covered include—key student loan concepts, good financial habits, and tools and resources available to help communicate these concepts to students.
- ◆ Campus-Based Computer-Based Training—Provides guidance on the FISAP through a review of the sections of the FISAP, including identifying changes made to the current FISAP and discussing the most commonly made errors when completing the form. The training is intended for financial aid and business office staff who are responsible for completing the FISAP, especially those who are new to completing the form.
- ◆ Financial Capability of Postsecondary Students Report—ED is working to modernize the user experience through our Next Gen FSA effort, which includes the release of personalized tools for student borrowing and financial decisions later this fall. FSA is also collaborating with other federal agencies and schools to improve financial literacy for students and families by empowering them with tools and resources to make informed financial decisions on paying for college. This includes ED’s work with the Financial Literacy and Education Commission (FLEC), which recently released a report Best Practices for Financial Literacy and Education at Institutions of Higher Education. This report provides recommendations for schools to teach financial literacy skills and provide useful information to assist students making decisions related to student borrowing.

Financial Aid Toolkit

The financial aid toolkit website has a variety of tools and resources that help schools and students learn about financial aid programs.

<https://financialaidtoolkit.ed.gov/tk/resources.jsp>

Publications

The Publications page on IFAP lists publications developed by FSA to assist in the administration of the Title IV federal student aid programs.

There are two types of publications listed here – General Publications and Processing Publications. General program-related publications (i.e. giving policy guidance) are found under General Publications. Processing-related technical publications are under Processing Publications.

Examples of General Publications include:

- ◆ Accrediting Agencies: List and Criteria for Recognition
- ◆ Audit Guidance
- ◆ Campus-Based Awards
- ◆ Cohort Default Rate Guide
- ◆ Cohort Default Rate Guide for Lenders and Guaranty Agencies
- ◆ Counselors and Mentors Handbook
- ◆ Federal School Code List
- ◆ Federal Student Aid Handbook
- ◆ FFEL Special Allowance Rates
- ◆ FFEL Variable Interest Rates
- ◆ FSA New School Guide
- ◆ Program Review Guide

Examples of processing publications include:

- ◆ Application Processing System Specifications for Software Developers
- ◆ COD Technical Reference
- ◆ COD XML Schema
- ◆ EDE Technical Reference
- ◆ EFC Formula Guide
- ◆ FISAP Form and Instructions
- ◆ FISAP Technical Reference
- ◆ ISIR Guide
- ◆ SAR Comment Codes and Text
- ◆ Summary of Changes for the Application Processing System

Federal Student Aid Glossary

The FSA Glossary is a comprehensive listing of the many terms of art as they are defined in the federal student aid context.
<https://ifap.ed.gov/help/glossary>

Worksheets, Schedules, and Tables

This page includes Federal Student Aid developed worksheets, schedules, and tables to assist in the administration of the Title IV federal student aid programs, including:

- ◆ Student Aid Eligibility Worksheets
- ◆ EFC Formula Worksheets and Tables
- ◆ Pell Grant Payment and Disbursement Schedules
- ◆ Return of Title IV Aid Worksheets
- ◆ Verification Worksheets

Processing Resources

This page has information on Application processing, which refers to the process through which the Free Application for Federal Student Aid (FAFSA) is evaluated and results are returned to students and institutions. Federal Student Aid maintains compilations of resource information to assist in processing Title IV federal student aid. The resources are categorized as follows:

- ◆ Application Processing Information
- ◆ Campus-Based Processing Information
- ◆ Grant and Direct Loan (COD) Processing Information
- ◆ FAFSA and SAR Materials
- ◆ NSLDS Reference Materials

Click on the “Processing Resources” graphic box in the center column on the IFAP home page).

Third Party Servicers

The Third Party Servicers page on IFAP provides the most updated information pertaining to responsibilities and requirements for institutions of higher education that enter into contracts with third-party servicers. The Third Party Servicers homepage on IFAP can be found at: <https://ifap.ed.gov/third-party-servicer>. Some of the Third Party Servicer subpages which are available on IFAP:

- ◆ Federal Register Notices including Regulations
- ◆ Dear Colleague Letters and Electronic Announcements
- ◆ Frequently Asked Questions
- ◆ Webinars & Presentations
- ◆ Resources

We encourage institutions to review the regulations governing an institution's use of third-party servicers at 34 CFR 668.2 (definition of third-party servicer), 34 CFR 668.23, and 34 CFR 668.25.

SOFTWARE & OTHER TOOLS

The FSA Download webpage has been discontinued. FSA Download has been replaced by the “Software and Other Tools” page on IFAP. The Software & Other Tools page can be reached at: <https://ifap.ed.gov/software-and-other-tools>.

Examples of technical references and guides on the Software & Other Tools page include:

- ◆ CPS Test System
- ◆ Direct Loan Tools
- ◆ EDExpress Software
- ◆ Perkins TEF File
- ◆ Perkins DataPrep
- ◆ NSLDS Enrollment Submittal
- ◆ NSLDS Exit Counseling Submittal
- ◆ NSLDS GA DataPrep
- ◆ NSLDS GA Loan Discharge Submittal
- ◆ NSLDS GA Teacher Loan Forgiveness Submittal
- ◆ NSLDS Gainful Employment Submittal
- ◆ NSLDS Perkins Loan Submittal
- ◆ NSLDS Reaffirmation Data Submittal
- ◆ SAIG Mailbox (EDConnect, SAIG Message Class File, TDClient, TDCommunityManager (TDCM))

DL Tools for Windows

<https://ifap.ed.gov/ilibrary/document-types/direct-loan-tools>

DL Tools for Windows is Volume IV of the COD Technical Reference. It covers external import record layouts and other information for systems administrators and is available on IFAP.

SCHOOL PARTICIPATION DIVISION

Call the appropriate School Participation Division for information and guidance on audit resolution, financial analysis, program reviews, technical assistance, and school and program eligibility/recertification. You can find contact information for the regional offices of the School Participation Division at:

<https://ifap.ed.gov/help-contact-information-school-participation-division>

In addition to directly entering the URL provided, you can also get there through IFAP. From the home page of ifap.ed.gov, go to the top horizontal gray toolbar and select Help. Within the Help menu select Contact Information. Within Contact Information select Federal Student Aid Offices. The School Participation Division is the last office listed.

The Electronic Version of the Application for Approval to Participate in the Federal Student Financial Aid Programs

Postsecondary institutions use the e-App to apply for designation as an eligible institution, initial participation, recertification, reinstatement, change in ownership, or to update a current approval. Updates include changes such as, but not limited to: name or address change, new location or program, increased level of offering, change of officials, or mailing address for publications. Find the e-App at: eligcert.ed.gov/

Training Officers and Institutional Improvement Specialists

Training officers provide local, regional, and national training on a wide variety of Title IV topics. Training venues include financial aid associations, state organizations, Department of Education national conferences, Department of Education online training, and Fundamentals workshops for new schools and financial aid staff. In addition, training officers provide direct assistance to schools by answering questions, conducting research, and distributing information. Though training officers train on Federal statute and law and the Federal Student Aid (Title IV) programs, each training officer resides in and exclusively serves a particular region made up of specific states. Due to state and school system differences, concentration of certain types of institutions and general workload issues, we encourage schools to contact those training officers located within their region for assistance (see the School Participation Division link above).

Institutional Improvement Specialists (IIS) are part of the regional School Participation Teams (SPTs). SPTs work with institutional eligibility, resolve institutional independent audits, review school financial statements, conduct TIV program reviews, and provide technical assistance. IIS assist schools within their regions that are beginning their participation in the federal student aid programs. They conduct technical assistance visits (on-site and off-site), provide one-on-one training, and answer general questions. In addition, an IIS might work closely with schools to resolve eligibility, audit, and/or financial concerns.

FSATech Listserv

By subscribing to this listserv, financial aid professionals can get answers to their technical questions about FSA's software or systems. They will also automatically get news flashes about processing and software issues. www2.ed.gov/offices/OSFAP/services/fsatechsubscribe.html

SERVICE CENTERS FOR SCHOOLS

The U.S. Department of Education provides multiple service centers that can help you manage your school's participation in the federal student aid programs. We have provided the necessary contact information for these centers as well as a brief description to help you identify the contact center that will serve your needs. You can find a quick reference guide to our Service Centers at:

<https://ifap.ed.gov/help-contact-information-service-centers-schools>

Where to Find Information about Services for Schools		
Service Center	Description	Contact Info Page
COD School Relations Center	Visit this center if you have questions about the Campus-Based Programs, the FISOP/FISAP or Federal Perkins Loan cohort default rates, or Pell/Iraq & Afghanistan Service Grants, TEACH Grants, and Direct Loans.	COD School Relations Center
Closed School Contacts	This website can help answer your questions about school closures, unpaid refunds, and poor quality of education/student services.	Closed Schools info
CPS/SAIG Technical Support and the Two Factor Authentication (TFA) Support Center	Answers your questions about the Central Processing System (CPS), the Student Aid Internet Gateway (SAIG), Web products such as FAA Access to CPS Online, help with software products such as EDconnect and EExpress, and TFA.	CPS/SAIG Technical Support Center
eZ-Audit	For help submitting financial statements and compliance audits online.	eZ-Audit
Foreign School Contacts	Foreign schools that need help with institutional eligibility, Direct Loan setup and processing, SAIG, publications and school Assessments can get that help here.	Foreign Schools
G5 Hotline	Get help with G5, the Department of Education's electronic system for grants management and payments.	G5 FAQ and contact info
Health Education Assistance Loan (HEAL) Program for Lenders and Lender Servicers	Contact for information and assistance related to the Health Education Assistance Loan (HEAL) Program.	HEAL for Lenders and Servicers
Direct Loan Consolidation for Loan Holders and Servicers	For answers to questions related to the Direct Consolidation Loan application process visit this page.	DL Consolidation for Loan Holders & Servicers
National Student Loan Data System (NSLDS)	The NSLDS Customer Support Center provides assistance with NSLDS functions including: enrollment reporting, exit counseling completion, loan history/detail online enrollment reporting, overpayments, transfer student monitoring, and school website access.	NSLDS
Total and Permanent Disability Discharge and Veterans Disability Discharge	Contact for information and assistance with the disability discharge process.	TPD & Veterans Disability Discharges
Loan Servicing Centers for Schools	For questions about loan repayment or other loan servicing issues, a school should contact the appropriate loan servicing center.	Loan Servicing for Schools
For a complete list of contact information, visit the IFAP contact information page: https://ifap.ed.gov/help-contact-information		

Where to Find Information about Federal Student Aid Offices		
Service Center	Description	Contact Info Page
Conferences	To ask a question or make a comment about an FSA conference, visit this site.	Conferences
Default Prevention Assistance	This website provides information and assistance with encouraging student loan repayment, addressing delinquent repayment when it occurs, reducing the risk of borrower default, and managing cohort default rates.	Default Prevention Resources
Experimental Sites Initiative	Schools that participate as experimental sites test the outcomes of modifying specific components of the laws and regulations governing the awarding of Title IV aid. The Department uses the results of these experiments to guide regulatory policy changes and propose legislative changes that will enhance program integrity, improve student outcomes, and reduce administrative burden. For information about participating in the Experimental Sites Initiative, visit this site.	Experimental Sites
Operations Performance Division	Visit this site if you have questions about cohort default rates or appeals and adjustments, or assistance with challenges and data corrections to default rate data.	Operations Performance Division
School Participation Division	Call the appropriate School Participation Division for information and guidance on audit resolution, financial analysis, program reviews, and school and program eligibility/recertification.	School Participation Division

Where to Find Information about Services for Students		
Service Center	Description	Contact Info Page
Borrower Defense Hotline	For general information about borrower defense to repayment, visit the StudentAid.gov Web site at StudentAid.gov/borrower-defense. For additional assistance with questions related to borrower defense to repayment, use the contact information listed below.	Borrower Defense Hotline (see bottom of page)
Default Resolution Group	This service center provides assistance to borrowers with defaulted federal education loan debt and federal student aid grant recipients who owe overpayments.	Default Resolution Group
Health Education Assistance Loan (HEAL) Program for Borrowers	Provides information and assistance to borrowers who received HEAL Program loans between 1978 and 1998.	HEAL Info
Loan Consolidation Information Center	Borrowers who are interested in consolidating their federal student loans should contact this center for information and technical assistance.	Loan Consolidation
The FSA Ombudsman Group	Individuals who have exhausted all other customer service avenues can often get help from the Ombudsman.	FSA Ombudsman Group
Loan Servicing Centers for Students	For questions about loan repayment or other loan servicing issues, a borrower should contact his or her loan servicing center.	Loan Servicing Centers for Students
For a complete list of contact information, visit the IFAP contact information page: https://ifap.ed.gov/help-contact-information		