

BREAKOUT SESSION #26

Accessing FSA Partner Connect for Destination Point Administrators

Shamarli Kollock and Natalia Kanaev

U.S. Department of Education

2020 Virtual FSA Training Conference for Financial Aid Professionals

INTRODUCTIONS

**SHAMARLI
KOLLOCK**

**PROGRAM
MANAGER**



NATALIA KANAeva

**NEXT GEN
WORKSTREAM
LEAD**



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**

The screenshot shows the FSA Partner Connect website. At the top, there is a navigation bar with links for KNOWLEDGE CENTER, TRAINING, FINANCIAL AID DELIVERY, TITLE IV PROGRAM ELIGIBILITY, and PARTNER CONNECT SERVICES. A green box highlights the 'Log In' button in the top right corner. Below the navigation bar is a large banner image with the text 'FSA PARTNER CONNECT' and a 'Log In' button. A green magnifying glass is drawn over the 'Log In' button. To the right of the banner, there is a section titled 'ABOUT FSA PARTNER CONNECT' which describes the platform and includes a link to 'StudentAid.gov'. Below the banner, there is a section titled 'IFAP is Now Knowledge Center' with a description and a 'View Knowledge Center' button. The main content area is divided into two columns: 'Title IV Information' and 'Quick Links'. The 'Title IV Information' section includes a description of Title IV regulations and a link to 'Title IV Application'. The 'Quick Links' section lists various services: COD Online, e-App, FAA Access, G5, NSLDS, and SAIG Portal. At the bottom, there are three sections: 'Important Dates' with a calendar for April 10th, 'What's New' with several 'Dear Colleague Letter' entries, and 'FSA Twitter' with a tweet about the 0% interest rate period.

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

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

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 Federal Student Aid websites to manage Title IV program eligibility and complete aid administration tasks.

Log In

If you are a student or parent, please visit [StudentAid.gov](#)

IFAP is Now Knowledge Center

Visit the Knowledge Center to find a library of information articles and resources for various federal student aid topics.

View Knowledge Center

Title IV Information

Title IV regulations require schools to apply for approval to participate in federal student financial aid programs. Applications are submitted for various reasons including, but not limited to, initial certification, participation status changes, and general information updates.

Click to see more. Title IV Application

Quick Links

- COD Online
- FAA Access
- NSLDS
- e-App
- G5
- SAIG Portal

Important 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

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Live Internet Webinar: Correctly Reported Gainful Employment...

APRIL 10

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

What's New

Dear Colleague Letter Posted on 02/11/2020 Webinar Recordings - New Accreditation...

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FSA Twitter

Federal Student Aid @FAFSA · 4h If you can afford it, continue to make payments toward your student loans. Here's why: [bit.ly/3nJUTCK](#)

TAKE ADVANTAGE OF THE 0% INTEREST RATE PERIOD

Once interest accrued prior to March 31, 2020 is paid, the full amount of your payments will be applied to the principal balance.

We can pay off your loan faster.

You'll lower the total cost of your loan over time.

ACCOUNT ACCESS MANAGEMENT CENTER

Help Center

Elizabeth | School User | Northwestern University

TITLE IV PROGRAM ELIGIBILITY

PARTNER CONNECT

Dashboard

Account Access Management Center

Settings

Log Out

20

My Account

Current Organization
OPEID 12345678

Potentially Affiliated Organizations

My Information

Elizabeth Bennet

Active

User Type

School User

FSA User ID

elizabeth.bennet

Business Email Address

elizabeth.bennet@example.edu

Organization Information

Organization Type

School

OPEID

12345678

Organization Name

Northwestern University

Organization City and State

Evanston, IL

School Administrators

Primary Administrator

James Madison

Business Email Address

james.madison@example.edu

Secondary Administrator

Abigail Adams

Business Email Address

abigail.adams@example.edu

My FSA Partner Connect Access

The access below is specific to FSA Partner Connect and will not affect your access to other FSA Systems.

Access	Description
Basic Access	<div>Includes the following permissions</div> <div><div>Access Type 1</div><div>Access Type 2</div><div>Access Type 3</div><div>Access Type 4</div><div>Access Type 5</div></div> <div>This is a description of an access type. It is an optional slightly more detailed description based on the subtypes available as part of default access. It opens up after you click on the caret.</div>
Additional Access	<div>Additional Access Type</div> <div>This is a description of an access type. It is an overview in 1-2 lines of what the access type includes.</div>
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Request New Access

ACCOUNT ACCESS MANAGEMENT CENTER

All users with a Partner Connect Account can view their account access details and request additional access

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

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Marisol | School User | Northwestern University

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

MH Welcome, Marisol Last Log In: 06/06/2020
Northwestern University – 12345600
Financial Aid Administrator 6 Years in Financial Aid [Edit](#)

Dashboard
Account Access Management Center **20**
Settings
Log Out
[FAA Access](#) [G5](#)
[NSLDS](#) [SAIG Portal](#)

School Notifications

Scheduled System Outages [Link](#) [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 [Link](#)

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

What's New [Link](#)

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

School Financials and Operations [Link](#) [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**

- 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



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the AMERICAN MIND™


Elizabeth

⇄

School User

⇄

Northwestern University



KNOWLEDGE CENTER

TRAINING

FINANCIAL AID DELIVERY

TITLE IV PROGRAM ELIGIBILITY

PARTNER CONNECT SERVICES


My Account

Current Organization

OPEID 12345678

Potentially Affiliated Organizations

My Information



Elizabeth Bennet

Active

User Type

School User

FSA User ID

elizabeth.bennet

Business Email Address

elizabeth.bennet@example.edu

Organization Information

Organization Type

School

OPEID

12345678

Organization Name

Northwestern University

Organization City and State

Evanston, IL

School Administrators

Primary Administrator

James Madison

Business Email Address

james.madison@example.edu

Secondary Administrator

Abigail Adams

Business Email Address

abigail.adams@example.edu

My FSA Partner Connect Access

⚠

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Request New Access

ADMINISTRATORS

MANAGE ORGANIZATION ACCOUNTS

- 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

Account Access Management Center

Manage Organization Accounts

My Account

Notification Preferences

Northwestern University Accounts

Export Org Users to CSV Add New User

OPEID: 12345678

Primary Administrator

Elizabeth Bennet
elizabeth.bennet@example.edu

Secondary Administrator

Phyllis Wheatley
phyllis.wheatley@example.edu

Search

Status: All Open

Last Name	First Name	Account Status	Status Last Updated
Greene	Christopher	Submitted	01/01/2020
Hamilton	Alexander	Submitted	01/01/2020
Armistead-Lafayette	James	Potential Affiliate - Access Requested	01/01/2020
Adams	Jane	Potential Affiliate	01/01/2020
de Lafayette	Marquis	Initiated - Awaiting User Input	01/01/2020
Attucks	Crispus	Pending	01/01/2020
Douglass	Frederick	In Review	01/01/2020
Sims	Joseph	In Review	01/01/2020
Ta	Lily	Active	01/01/2020
Taberna	Sarah	Active	01/01/2020
Valenca	Robert	Active	01/01/2020
Wheatley	Phyllis	Active	01/01/2020
Ross	Betsy	Active	01/01/2020
Wheatley	Phyllis	Active	01/01/2020
Washington	Martha	Active	01/01/2020

250 total records

Manage Potential Affiliates

A woman with dark hair, wearing a patterned scarf and a light-colored jacket, is looking down and slightly to the side with a thoughtful expression. The background is a blurred indoor setting.

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

ENROLL A NEW USER

1 Account Info

To add a new user to your organization, enter their first and last name and business email address

Manage Organization Accounts > Add New User

Account Access Management Center

Manage Organization Accounts

My Account

Notification Preferences

Add New User



Organization Information ?

Organization Type	OPEID	Organization Name	Organization City and State
School	12345678	Northwestern University	Evanston, IL

User Demographic Information

Please provide the First Name, Last Name, and Business Email Address of the user you wish to add.

First Name *

Last Name *

Business Email Address *

For School Users, we recommend inputting the school email address, which often ends with .edu

Confirm Email Address *

Cancel

Next

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

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

Help Center

FederalStudentAid

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Elizabeth | School User | Northwestern University

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

Manage Organization Accounts > Add New User

Account Access Management Center

Manage Organization Accounts

My Account

Notification Preferences

Add New User

Account Info

Access

Review and Submit

Account Information

First Name	Last Name	OPEID	Organization Name	Organization City and State
John	Wayne	12345678	Northwestern University	Evanston, IL

Grant Access

Please select the accesses you wish to grant to this account. Basic access may not be deselected.

Access	Description
Basic Access	
School User Basic Access includes:	This basic access includes:
<ul style="list-style-type: none">Dashboard, Account Access Management Center, and SettingsStudent, Parent, and Borrower Account InformationPartner Search and Profile Information	<ul style="list-style-type: none">Access to your dashboard, account, and settings pages.Access to the Student, Parent, and Borrower Search and Account information. This contains: read-only access to what a student will see on their StudentAid.gov "Aid Summary" and "Enrollment" pages, profile information, award summary and award detail information, ISIR information, as well as Counseling and ASLA, MPN and ATS, Credit Check, Default, PLUS Loan, and SULA information.Access to the Partner Search and Profile. This contains: School General Information, Extended Processing Information, Program Relations, School Options, Report Selection, Relationships, and School Financial Information

Back

Next

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

Account Access Management Center

Manage Organization Accounts

My Account

Notification Preferences

Add New User



Account Summary

If you wish to edit this information, you must go back.

User Demographic Information

First Name	Last Name	Business Email
John	Wayne	john.wayne@example.edu

Organization Information

Organization Type	OPEID	Organization Name	Organization City and State
School	12345678	Northwestern University	Evanston, IL

FSA Partner Connect Access

Access	Description
Basic Access	

Acknowledge and eSign

Please review the Rules of Behavior and Privacy Act. You must view and acknowledge them before proceeding.



DONE

Rules of Behavior and Privacy Act

☐

I **acknowledge** receipt of, understand my responsibilities, and will comply with the Rules of Behavior for the Department of Education Systems I access.

I **understand** that failure to abide by the linked rules and responsibilities may lead to disciplinary action up to and including permanent loss of access to Federal Student Aid (FSA) Systems.

I **further understand** that violation of these rules and responsibilities may be prosecutable under local, State, and/or Federal law.

Please enter your full legal name exactly as it appears below.

First Name	Last Name
Elizabeth	Bennet

Full Legal Name *

Today's Date *



Back

Submit



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

KNOWLEDGE CENTER

TRAINING

FINANCIAL AID DELIVERY

TITLE IV PROGRAM ELIGIBILITY

PARTNER CONNECT SERVICES

Account Access Management Center

Manage Organization Accounts

My Account

Notification Preferences

Northwestern University Accounts

Export Org Users to CSV

Add New User

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elizabeth.bennet@example.edu

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Valenca	Robert	Active	01/01/2020
Wheatley	Phyllis	Active	01/01/2020
Ross	Betsy	Active	01/01/2020
Wheatley	Phyllis	Active	01/01/2020
Washington	Martha	Active	01/01/2020

250 total records

Manage Potential Affiliates

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

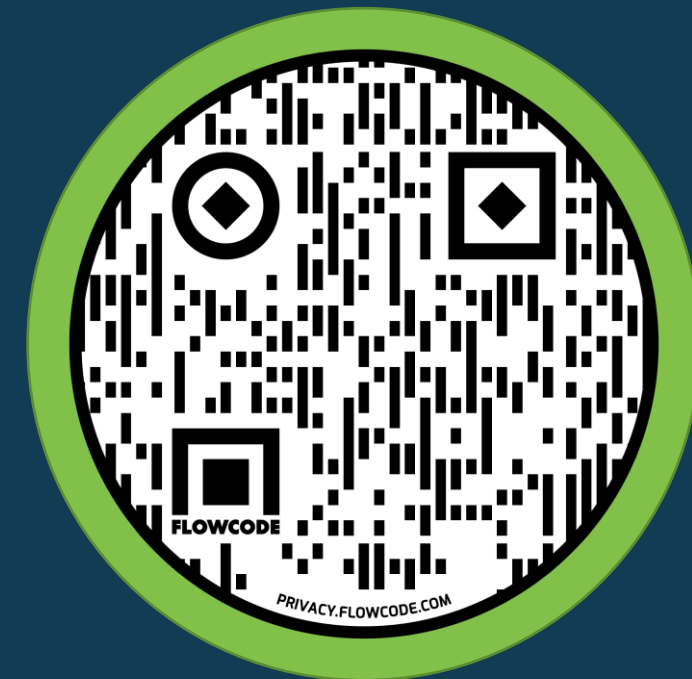
FSA has been engaging the **Partner Experience Council**, a group of partners who have volunteered to share knowledge and experience through surveys, interviews, usability sessions, and focus groups.

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>

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**

Q & A



PRESENTER CONTACT INFORMATION

SHAMARLI KOLLOCK

Shamarli.Kollock@ed.gov

NATALIA KANAEVA

Natalia.Kanaeva@ed.gov
