
Technical Resources and Assistance



While nongovernmental organizations and their publications often provide useful information, the guidance they offer provides no defense in the case of audit and program review findings. 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. 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)

The 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. Please note: we have omitted references to certain sections and items we felt were not relevant to business offices, so viewing IFAP online may look slightly different for certain sections and information on the IFAP website. IFAP will encompass more information than presented in this Appendix. You can find IFAP at:

<https://ifap.ed.gov/ifap/>

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

- ◆ **Getting Started**—This section provides an introduction to the IFAP Website for new users and others who want assistance in using IFAP. Federal Student Aid 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.

- ◆ **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.

Occasionally, we may add information to the What's New area related to hot topics within Federal Student Aid.

- ◆ **Calendar**—The Federal Student Aid Calendar is a helpful tool to view the current conferences, trainings, deadlines or other events occurring within the financial aid community. To view the most recent items posted to the FSA Calendar, please click on the New Calendar Entries from the Calendar submenu above.

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 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.

- ◆ **My IFAP**—Through My IFAP you can receive weekly updates to the Information for Financial Aid Professionals (IFAP) Website. Tags within My IFAP include:
 - Login
 - New User Registration
 - Help with My IFAP
- ◆ **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, by medium (i.e. e-learning or instructor-led), and by past presentations. You can also refer to the training announcements and training calendar on this page.
- ◆ **Help**—The options on this page 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 or sending an e-mail directly to ifap@ed.gov. You may also contact the Research and Customer Care Center at 1-800-433-7327.

- ◆ **Feedback**—You may use one of the options below 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. If you need additional assistance, you may also contact the Research and Customer Care Center at 1-800-433-7327.

Major subpages on IFAP include:

- ◆ Tools for Schools
- ◆ Publications
- ◆ Worksheets, Schedules and Tables
- ◆ 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.

ifap.ed.gov/ifap/toolsforschools.jsp (or click on the “Tools for Schools” graphic box in the center column on the IFAP home page)

Examples of tools include:

- ◆ **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.
- ◆ **FSA Coach (Web-Based training)**—Coach is a comprehensive, introductory course on school requirements for administering the Federal Student Aid programs. The 37 lessons can be completed individually, allowing you to tailor the training to your specific needs.
- ◆ **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

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://studentaid.ed.gov/sa/glossary>



Financial Aid Toolkit

The financial aid toolkit website has a variety of tools and resources

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



Social Media Resources

Federal Student Aid offers a variety of information via social media from the following sources

YouTube: <https://www.youtube.com/user/FederalStudentAid>

Twitter: <https://twitter.com/FAFSA>

Facebook: <https://www.facebook.com/FederalStudentAid>



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 develop 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.

Publications

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

ifap.ed.gov/ifap/publications.jsp (or click on the “Publications” graphic box in the center column on the IFAP home page)

There are two types of publications – General Publications and Processing Publications. General program-related publications are found under General Publications. Processing-related 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
- ◆ Gainful Employment Operations Manual
- ◆ Perkins Cohort Default Rates (Orange Book)
- ◆ 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
- ◆ School Electronic Process Guide
- ◆ Student Web Application Products Process Guide
- ◆ Summary of Changes for the Application Processing System

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
- ◆ Format for Referring Overpayments to Borrower Services
- ◆ Verification Worksheets

The Worksheets, Schedule, and Tables page is located at:

<https://ifap.ed.gov/ifap/wst.jsp> (or click on the “Worksheets, Schedules & Tables” graphic box in the center column on the IFAP home page)

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

The Processing Resources page is located at <https://ifap.ed.gov/ifap/ref.jsp> (or click on the “Processing Resources” graphic box in the center column on the IFAP home page)

FSA DOWNLOAD FOR SOFTWARE AND MANUALS

If you need to download any of Federal Student Aid’s software and associated documents or technical references and guides, you can do so at the U.S. Department of Education’s Federal Student Aid Download (FSAdownload) Website, located at: fsadownload.ed.gov/

DL Tools for Windows



<https://www.fsadownload.ed.gov>

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 for download at the fsadownload website.

Examples of technical references and guides include:

- ◆ COD Technical Reference
- ◆ CPS Test System
- ◆ EDEXpress Packaging Technical Reference
- ◆ Electronic Data Exchange Technical Reference
- ◆ ISIR Guide
- ◆ Perkins TEF File
- ◆ Renewal FAFSA Process Guide
- ◆ SAR/ISIR Comment Codes and Text
- ◆ Summary of Changes to the Application Processing System.

Examples of software and associated documents include:

- ◆ Direct Loan Tools
- ◆ EDEXpress
- ◆ EDconnect Message Class Table

- ◆ GA DataPrep
- ◆ NSLDS GA Loan Discharge Submittal
- ◆ NSLDS Enrollment Submittal
- ◆ NSLDS Exit Counseling Submittal
- ◆ NSLDS Gainful Employment Submittal
- ◆ NSLDS Teacher Loan Forgiveness Submittal
- ◆ NSLDS Perkins Loan Submittal
- ◆ Perkins DataPrep
- ◆ SAIG Mailbox Software & Manuals
- ◆ SUN Java Runtime Environment.

TIP**School Participation Team**

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 tool bar and select Help. Within the Help menu select Contact Information. Within Contact Information select Federal Student Aid Offices. The School Participation Teams is the last office listed.

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:

ifap.ed.gov/ifap/helpContactInformationDetailedList.jsp?contactname=School%20Participation%20Division

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 a national scope, each training officer resides in 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.

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

FSATech Listserv



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 left side vertical gray tool bar and select System & Processing Links—Application. Within the drop down menu FSATech Listserv is the fifth tag.

FSAPUBS

The FSAPubs website (www.fsapubs.gov) allows schools to order paper publications and find electronic publications that can be saved and/or printed. Schools can login to the site by using their OPE ID for functions such as viewing their order history, managing their account and viewing their shopping cart.

FSAPubs



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 left side vertical gray tool bar and select Resource Links. Within the drop down menu FSAPubs.gov Publication Ordering is the fourth tag.

CENTERS FOR SERVICE

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. For complete information, visit: ifap.ed.gov/ifap/helpContactInformation.jsp You can find a quick reference guide to our Service Centers at:

ifap.ed.gov/docs/CallQRef.pdf

Where to Find Information about Federal Student Aid Offices		
Service Center	Description	Contact Info Page URL
Conferences	To ask a question or make a comment about an FSA conference, visit this site.	http://preview.tinyurl.com/y7w2dwfa
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.	https://ifap.ed.gov/DefaultPreventionResourceInfo/
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.	https://experimentalsites.ed.gov/exp/index.html
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.	http://preview.tinyurl.com/y8szu5xm
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.	http://preview.tinyurl.com/yafxyht7

Where to Find Information about Services for Schools		
Service Center	Description	Contact Info Page URL
Campus-Based Call Center	Visit this center if you have questions about the Campus-Based Programs, the FISOP/FISAP or Federal Perkins Loan cohort default rates.	http://preview.tinyurl.com/ybho86dw
Closed School Contacts	This website can help answer your questions about school closures, unpaid refunds, and poor quality of education/student services.	http://preview.tinyurl.com/ydhdctj8
COD School Relations Center	They provide assistance with processing Pell/Iraq and Afghanistan Service Grants, TEACH Grants, and Direct Loans.	http://preview.tinyurl.com/y73yany2
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 EDEExpress, and TFA.	http://preview.tinyurl.com/y95a7mh9
eZ-Audit	For help submitting financial statements and compliance audits online.	http://preview.tinyurl.com/ybd2rpq7
Federal Student Aid Research and Customer Care Center (RCCC)	Contact the RCCC with your questions about the Title IV federal student aid programs, policies, and regulations.	http://preview.tinyurl.com/ybp9qo79
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.	http://preview.tinyurl.com/ycwrja74
G5 Hotline	Get help with G5, the Department of Education's electronic system for grants management and payments.	http://preview.tinyurl.com/ycnnvo3r
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.	http://preview.tinyurl.com/y6w67b2f
Direct Loan Consolidation for Loan Holders and Servicers	For answers to questions related to the Direct Consolidation Loan application process visit this page.	http://preview.tinyurl.com/yaehuplq
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.	http://preview.tinyurl.com/yddtoxt3
Total and Permanent Disability Discharge and Veterans Disability Discharge	Contact for information and assistance with the disability discharge process.	http://preview.tinyurl.com/ya86r4k4
Loan Servicing Centers for Schools	For questions about loan repayment or other loan servicing issues, a school should contact the appropriate loan servicing center.	http://preview.tinyurl.com/yaqomec3
For a complete list of contact information, visit the IFAP contact information page at: http://preview.tinyurl.com/ycwz9uwa		

Where to Find Information about Services for Students		
Service Center	Description	Contact Info Page URL
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.	http://preview.tinyurl.com/ycb8fuw3
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.	http://preview.tinyurl.com/ycfvcjf7
Federal Student Aid Information Center (FSAIC)	The FSAIC provides parents and students with information and assistance (in English and Spanish) about the FAFSA application process and ED's grant and loan programs.	http://preview.tinyurl.com/yd5bzhtz
Health Education Assistance Loan (HEAL) Program for Borrowers	Provides information and assistance to borrowers who received HEAL Program loans between 1978 and 1998.	http://preview.tinyurl.com/ybv8qws7
Loan Consolidation Information Center	Borrowers who are interested in consolidating their federal student loans should contact this center for information and technical assistance.	http://preview.tinyurl.com/ybo7nnup
The FSA Ombudsman Group	Individuals who have exhausted all other customer service avenues can often get help from the Ombudsman.	http://preview.tinyurl.com/y7raxbpv
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.	http://preview.tinyurl.com/y9dwal9h
For a complete list of contact information, visit the IFAP contact information page at: http://preview.tinyurl.com/78dvu6r		

