



California Community Colleges Student Financial Aid Administrators Association

Financial Aid Systems Tutorial

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Financial Aid Systems Tutorial

- Do you remember when?
 - Desktop computers were dumb terminals?
 - EFC calculations were done by hand or by mini calculators?
 - You constantly reminded students to bring in their paper SARs?
 - Pell Grants were processed by filling in the “bubbles” on the back of the SAR?
 - The highlight of your day was when the mail arrived with FA transcripts (that you had requested 3 times)



Financial Aid Systems Tutorial

- How far have we come?
 - IFAP
 - CPS online access
 - NSLDS
 - COD Online
 - EDExpress/EDconnect software
 - SAIG
 - Participation and Recertification
 - WEB GrantsDefault Management



IFAP Review

- IFAP (Information for Financial Aid Professionals)
- www.ifap.ed.gov
 - Starting point for access to all online resources offered by ED
 - Updated by ED with legislative changes or policy guidance
 - Links to all ED publications including FSA Handbooks and Blue Books
 - Search feature for quick look up option



The IFAP online library contains technical publications, regulations, and policy guidance on the administration of the Federal Student Aid programs.

Keyword Search

[Advanced Search](#)

[About this search](#)

OTHER VIEWS

SCHOOL PORTAL FEATURES

MEMBER SERVICES

RSS XML

Download Plug-ins and Viewers

Tools for Schools

- [Tools for Promoting Federal Aid](#)
- [COD Computer-Based Training](#)
- [Conference Presentations](#)
- [EDEXpress Basics \(WBT\)](#)
- [eZ-Audit](#)
- [FISAP Web Based Training](#)
- [FSA Assessments](#)
- [FSA COACH \(Web Based Training\)](#)
- [ISIR Analysis Tool](#)
- [Listserves/Mailing Lists](#)
- [Videoconferences](#)

Letters & Bulletins

Dear Partner/Colleague Letters

- [Campus-based \(CB\)](#)
- [Financial Partners \(FP\)](#)
- [General Distribution \(GEN\) Letters](#)
- [Pell Grant \(P\)](#)
- [Training Announcements \(ANN\)](#)

On-Line References

[Higher Education Reconciliation Act of 2005 \(HERA\) Information Including ACG and SMART Grant Information](#)

- [Accrediting Agencies: List and Criteria for Recognition](#)
- [Application Processing Materials](#)
- [Campus-Based Program Materials](#)
- [Common Origination & Disbursement \(COD\)](#)
- [Default Rate Materials](#)
- FFEL [Special Allowance Rates](#) & [Variable Interest Rates](#)
- [NSLDS Reference Materials](#)
- [Program Review Guidance](#)
- [SAR/ISIR Reference Materials](#)

Law & Regulations

[2006-07 Negotiated Rulemaking for Higher Education](#)



FAP Review

- Financial Aid Professionals
- <http://fsa4schools.ed.gov/SCHOOLSWebApp/index.jsp>
- Direct links to:
 - Resources and Training
 - SAIG web site
 - FSA Download web site
 - CPS Demo Site
 - FAA Access
 - Participation and Funding



FSA Links & IFAP Database



Advanced Download Plug-ins and Viewers

Resources & Training

- IFAP Home Page
- 2006-07 Negotiated Rulemaking for Higher Education
- Conferences
- CPS Web Applications Demo
- Advisory Committee on Student Financial Aid
- Default Management
- FSA Assessments
- Hurricane Information
- ISIR Analysis Tool
- Listserves/Mailing Lists
- Publications and How to Order
- School/Lender/Program Data
- Software and Manuals: SAIG
- Training (TFAP)
- Videoconferences
- Contacts

FAA Access to Student Data

- CPS (FAFSA/ISIR Processing)

FAP Calendar

October 2007						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

Events Deadlines Training NPRMs What's New

Tuesday, October 30 - Friday, November 2

- Federal Student Aid Conference - New Orleans, LA

FAP Calendar updates are now available as a RSS feed. Add <http://fsa4schools.ed.gov/SCHOOLSWebApp/rss> to your RSS reader.

Hot Topics

[Higher Education Reconciliation Act of \(HERA\) Information Including ACG and SMART Grant Information](#)

[2006-07 Negotiated Rulemaking for Higher Education](#)

FAP Headlines

FSA News

- Implementation of Additional 2007-2008 COD System Functionality
- 2008-2009 Distribution Update: Frequently Asked Questions
- Beta Testers Needed for EDEXpress for Windows 2009, Release 1.0
- Availability of 2008-2009 Summary of Changes for the Application Processing System Guide
- The U.S. Department of Education is pleased to announce the availability of EDconnect version 7.2



FAA Access to CPS Online

- **FAA Access CPS Online**
 - Requires FAA PIN
 - Verification Tool
 - R2T4 online
 - Supports the following ISIR options
 - View a student's ISIR
 - Compare student's ISIR transactions
 - Submit a signature flag
 - Request YTD ISIR information
 - Supports the following FAFSA options
 - Enter a student's FAFSA
 - Correct a processed FAFSA
 - Continue working on a saved FAFSA



START HERE
GO FURTHER
FEDERAL STUDENT AID

FAA Access to CPS Online

Help FAQs

FAA Access to CPS Online

NEED HELP?

Welcome to FAA Access to CPS Online!

Use FAA Access to CPS Online to:

- View students' SAR information
- Compare two ISIR transactions for the same student
- Submit a signature flag for an application in a signature hold status
- Enter a FAFSA or Renewal FAFSA
- Correct a processed FAFSA
- Continue working on a saved FAFSA or Correction
- Review verification data with the Verification Tool
- Request ISIR data
- Analyze ISIR data as a basis for improving your verification process
- Calculate and manage the return of Title IV funds

Scheduled Maintenance:

FAA Access to CPS Online will be unavailable on every Sunday from 5 a.m. to 11 a.m. (Eastern Time). We apologize for any inconvenience this may cause.

Select [Next](#) to continue.

NEXT



FAA Access to CPS Online

NEED HELP?

Welcome to the FAA Main Menu

Select an option from the following menu. It will be necessary to provide the TG# for your Destination Point and your Federal School Code:

- **[Student Inquiry](#)**
View a student's Student Aid Report (SAR) information, including the Expected Family Contribution (EFC), NSLDS information, and SAR Comments. Compare two ISIR transactions for the same student using **ISIR Compare**. Submit a signature flag for an application in a signature hold status using the **Standalone FAA Signature** feature.
- **[Application/Verification Tool Entry](#)**
Enter a student's FAFSA, Renewal FAFSA, or Correction data and submit it to the CPS for processing, or use the Verification Tool to assist with verification of a student's processed ISIR.
 - **[FAFSA Application](#)**
 - **[Renewal FAFSA](#)**
 - **[Corrections](#)**
 - **[Verification Tool](#)**
- **[Restore a Saved Application](#)**
Restore a partially completed and saved FAFSA, Renewal FAFSA or Correction and submit it to the CPS for processing.
 - **[FAFSA Application](#)**
 - **[Renewal FAFSA](#)**
 - **[Corrections](#)**
- **[ISIR Request](#)**
Request ISIR data.
- **[ISIR Analysis Tool](#)**
Analyze FAFSA information reported on the ISIR. Data is used to determine what impact changes to student-reported information had on EFC and Pell eligibility.
- **[Return of Title IV Funds on the Web](#)**
Calculate and manage the return of Title IV funds. Data is collected, and the Return of Title IV Funds is calculated according to ED's Student Assistance General Provisions.



ISIR Request Process

Request Title:	<input type="text"/>
Specify SSIs:	<input type="button" value="ENTER SSNS"/> <input type="button" value="LOAD SSN FILE"/>
Transaction Number:	Select <input type="button" value="v"/>
Transaction Number Qualifier:	Select <input type="button" value="v"/>
Eligibility Status:	Select <input type="button" value="v"/>
Veteran Status:	Select <input type="button" value="v"/>
Verification Status:	Select <input type="button" value="v"/>
Dependency Status:	Select <input type="button" value="v"/>
Grade Level:	<input type="checkbox"/> First year never attended <input type="checkbox"/> First year attended before <input type="checkbox"/> Second year <input type="checkbox"/> Third year <input type="checkbox"/> Fourth year <input type="checkbox"/> Fifth year or more undergraduate <input type="checkbox"/> First year graduate <input type="checkbox"/> Continuing graduate
Request ISIRs resulting from your corrections:	<input type="checkbox"/> Yes
EFC Range:	
Starting EFC:	<input type="text"/>
Ending EFC:	<input type="text"/>
Date Type:	Select <input type="button" value="v"/>

A)



R2T4 On the Web

FAA Access to CPS Online - Return of Title IV Funds on the Web		
Student Record Status Create New Record Find Existing Record Institutional Charges School Calendar User-Specified Fields Reports Data Export	Welcome to Return of Title IV Funds on the Web (R2T4) Return of Title IV Funds (R2T4) is a non-year specific product that processes, calculates, manages and stores students' return of Title IV aid calculation records. Use the links on the left Navigation Bar to set up your school screens, student records and to access reports. The links below explain the R2T4 process and functionality.	
	Before You Start	Using R2T4
Overview	Setup the School screens:	Overpayment Notification and Tracking reports:
<ul style="list-style-type: none"> ▪ What is R2T4? 	<ul style="list-style-type: none"> ▪ Institutional Charges ▪ School Calendar ▪ User-Specified Fields 	<ul style="list-style-type: none"> ▪ Student Notification ▪ School Portion of R2T4 to be Returned ▪ Student Repayment Arrangement(s) - Completed ▪ Student Repayment Arrangement(s) - Not Completed ▪ Notification Tracking Status ▪ Students With a Post-Withdrawal Disbursement ▪ Student Listing ▪ Student Records Referred to the Department of Education
Gather the following:	Student records:	
<ul style="list-style-type: none"> ▪ Student's Withdrawal Information ▪ Student's Title IV Aid Information ▪ Student's Program Information ▪ Student's Account Information ▪ School Information 	<ul style="list-style-type: none"> ▪ Create a new student ▪ Find an existing student 	



Application for Approval to Participate in the Federal Student Aid Programs

- Initial Participation
- Re- Certification of Eligibility
- Information updates including:
 - Name or campus location changes
 - Changes in ownership
 - Additional programs
 - Accreditation changes
 - Institutional control and structure changes



START HERE
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Application for Approval to Participate in Federal Student Financial Aid Programs

*U.S. Department of Education, Federal Student Aid, Program Compliance, School Eligibility Channel, School Participati
Management Division*

Index

[Introduction](#)

[Help](#)

[Login Help](#)

[Section A](#)

Introduction to the "Application for Approval to Participate in Federal Student Financial Aid Programs"

Additional help to assist you in completing the electronic application



Student Aid Internet Gateway SAIG

- Enroll for a SAIG Mailbox to exchange information with the following systems:
 - CPS (FAFSA/ISIR)
 - COD (Direct Loan, Pell, ACG and National SMART Grant)
 - FISAP (eCampus)
 - NSLDS (ER/On-line/eCDR)
 - CSB (DL Delinquency Reports, Borrower Services)



Student Aid Internet Gateway SAIG

- Update the following information:
 - Submit an application for a new mailbox
 - Add or change services or demographic information
 - Delete a mailbox
 - Enroll for a test mailbox
- Designate Destination Point Administrators
- Add users for the following systems:
 - NSLDS
 - FAA Access to CPS



U.S. DEPARTMENT OF EDUCATION

STUDENT AID INTERNET GATEWAY - ENROLLMENT

Skip navigation link

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SAIG Mailbox

- ⌘ [SAIG Info](#)
- ⌘ [Who Is Eligible](#)
- ⌘ [What You Need to Enroll](#)
- ⌘ [Enroll for SAIG Mailbox](#)
- ⌘ [Restore Saved Enrollment](#)
- ⌘ [Check your mailbox enrollment information](#)
- ⌘ [Print User Statement](#)
- ⌘ [Print Enrollment Signature Documents](#)
- ⌘ [Print Designee Signature Pages](#)
- ⌘ [Frequently Asked Questions](#)
- ⌘ [Help](#)

FAA Online Access

- ⌘ [Enroll FAA Users for Online Services](#)

Related Services

- ⌘ [FSA Download](#) (Software and Manuals)
- ⌘ [Subscribe](#) to the [FSATECH Listserv](#) to join our on-line discussion of systems issues.

Other Web Sites for FSA Student Data

- ⌘ [FAA Access to CPS Online](#)
- ⌘ [E-Campus Based/FISAP](#)



ENROLL FOR SAIG MAILBOX

Select this icon to:

- Submit an application for a new mailbox
- Add or change services or demographic information
- Delete a mailbox
- Enroll for a test mailbox

Postsecondary schools, lenders, guarantors and their servicers can enroll to exchange data with the following systems:

- CPS (FAFSA/ISIR)
- COD (Direct Loan, Pell, ACG and National SM&RT Grant)



ADD ANOTHER NSLDS ONLINE USER

This is available only to existing schools, Third Party Servicers, State Scholarship and Grant Agencies and approved Guaranty Agencies, Lenders and Lender/Servicers.

- Only the Primary Destination Point Administrator can select this icon to enroll another user for access to the NSLDS On-line system for their organization.
- The completion of this application does not guarantee access; the user will be notified of their ID if approved by NSLDS.



ENROLL FAA USERS FOR ONLINE SERVICES

Existing Destination Point Administrators can select this icon to enroll FAA users for access to:

- FAA Access to CPS Online web site



FSA Software and Manuals

- www.fsadownload.ed.gov
- The following software is maintained for download:
 - **EDExpress**
 - ISIR management
 - Communications module
 - Packaging module
 - User defined module
 - COD module
 - **Edconnect**
 - All communications from ED
 - **SSCR**
 - Export completed SSCR
 - **Direct Loan Tools**
 - **ISIR Analysis**
 - **Quality Analysis Tool**



FSA Software and Manuals

- **References and Documentation**
 - COD Technical References
 - CPS Test System
 - EDExpress Packaging and Technical References
 - Electronic Data Exchange
 - ISIR Guide
 - SAR/ISIR Comment Codes and Text
 - School Electronic Process Guide
 - Summary of Changes for the Application Processing System
 - XML ISIR Guide



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FSA DOWNLOAD - SOFTWARE & MANUALS

Skip navigation link

Search:

[Schools Portal](#) | [Help Center](#) | [Feedback](#) | [Privacy](#)

Site Navigation

- » [Home](#)
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» [What's New](#) » [Tips on downloading](#)

Software and Associated Documents

Select this link to download current software and associated installation guides, cover letters, and desk references.
[For archived software and associated documents, click here.](#)

Technical References and Guides

Select this link to download current application system technical references for programmers, ISIR guides/comment codes and text/XL ISIR, TEF Files, summary of changes, and sources of assistance.
[For archived technical references and guides, click here.](#)

Recent Postings

- [CPS Test System User Guide \(2008-2009\)](#) 10/26/07
- [Summary of Changes for the Application Processing System \(2008-2009\)](#) 10/26/07
- [EDconnect version 7.2.0](#) 10/26/07
- [COD Technical Reference \(2008-2009\) Update](#) 10/26/07
- [COD Technical Reference \(2007-2008\) Update](#) 10/26/07
- [EDE Technical Reference 2008-2009](#) 10/24/07
- [CPS Test System \(2007-2008\) Update](#) 10/22/07

Related Services

- » [FSA Enrollment](#) (SAIG Mailbox)
- » [Subscribe](#) to the [FSATECH Listserv](#) to join our on-line discussion of systems issues.

Other Web Sites for FSA Student Data

- » [FAA Access to CPS Online](#)
- » [E-Campus Based/FISAP](#)
- » [COD](#) (separate enrollment required)
- » [NSLDS for FAAs](#) (separate enrollment required)
- » [Other Dept. of ED Links](#)



The eCampus-Based System

- Fiscal Operations Report and the Application to Participate in:
 - Federal Perkins Loan Program (Perkins Loan)
 - Federal Supplemental Grant Program (SEOG)
 - Federal Work Study Program (FWS)



The eCampus-Based System

- <http://cbfisap.ed.gov/>
- Online Application
 - Includes Instructions
 - Incorporates edits to prevent application errors
- Requires User ID and Password
 - Requested by accessing
 - <http://www.eligcert.ed.gov/>



The eCampus-Based System



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The eCampus-Based System

Welcome to the eCampus-Based Program Web site for Federal Student Aid.

[Campus-Based Program Materials](#) | [Other Links](#) | [Privacy Policy](#) | [Contacts](#) | [Q&As](#) | [FISAP Desk Reference](#) | [FISAP Form](#) | [FISAP Instructions](#) | [Title III/IV](#) | [Contact Us](#)

Warning: This is a United States Department of Education computer system, which may be accessed and used only for official Government business by authorized personnel. Unauthorized access or use of this computer system may subject violators to criminal, civil, and/or administrative action.

This site contains the "Fiscal Operations Report and Application to Participate (FISAP)" for the three Campus-Based programs: Federal Perkins Loan, Federal Supplemental Educational Opportunity Grant (FSEOG), and Federal Work-Study (FWS). In addition, this site allows users to access Campus-Based account data and view reports. For information on the eCampus-Based system and instructions for completing the FISAP, users can go to the [FISAP Tutorial](#).

To access eCB, you must be registered. If you are already registered, click on the "Login" button below and enter your User ID and password. If you are not registered, click on the "Login" button below, then click on the registration link in the left navigation bar and enter the information requested. Once you have registered, you will receive a User ID by e-mail. When you have your ID, return to this site and click "Login." Enter your User ID and the password you created when you registered. Click "Submit" to access eCB.

Login

What if I have forgotten my password?

Click the "Login" button and click on "Forgot Password." Re-enter your User ID. You will then be asked a challenge question; once you respond correctly, you will need to create a new password. In an hour, you should be able to access eCB.

What if my school is new to the Campus-Based programs?

If you do not possess a current Program Participation Agreement for Title IV programs or are a first-time participant in the Campus-Based programs, you will need to apply for participation through the Department of Education's office of Case Management and Oversight (CMO). An online application to participate in



CSAC Web Grants

- CSAC Communications
- CAL Grant Policy Guidance
- Web Based Grant Processing
 - Grant Roster management and payment authorization
 - EL level verification
 - Student Information Updates
 - Reconciliation tools



California Community Colleges Student Financial Aid Administrators Association

**Thank You
For Attending**