

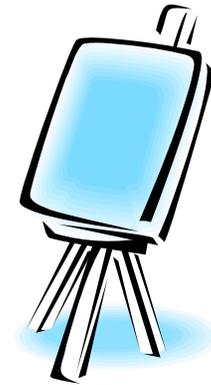


Integrated Partner Management NASFAA Conference 2008 July 2008

Presenter
Susan Stallard



- Current way of doing business...
- A new way of doing business...
- IPM and the Future State
- IPM Benefits
- Key Aspects of The IPM Portal
- Portal preview
- Project Phases
- What about all that data?
- Where are we?
- Outreach & Training
- Next Steps...
- Q&A
- Contact Information



Current way of doing business...



- **Federal Student Aid is looking at improving ways we work with our Title IV Partners**
- **Federal Student Aid understands the current issues:**
 - “Siloed” applications to perform single work processes or streams
 - Paper intensive processing for Partners and Federal Student Aid
 - Slower processing time
 - Lack of overall common requirements for each system

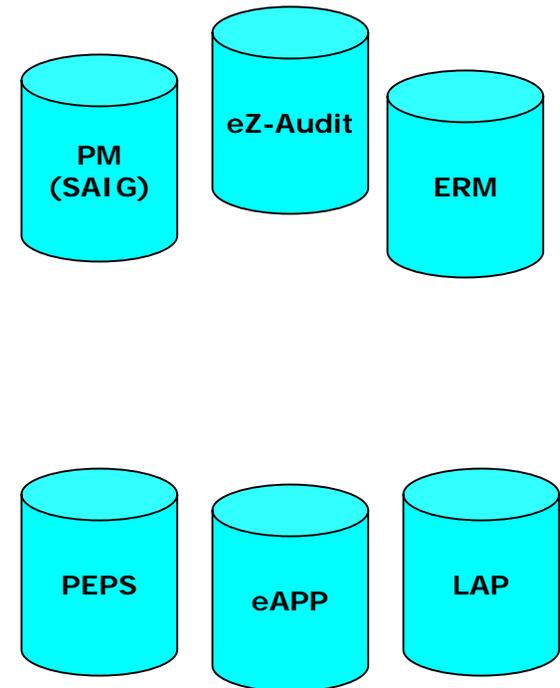


Current way of doing business...



Currently Federal Student Aid Partners use multiple systems that are mapped to various Title IV requirements:

- Lender Application Process (LAP)
- Electronic Application (eAPP)
- Financial Statements & Compliance Audits (eZ-Audit)
- Participation Management (PM) portion of Student Aid Internet Gateway (SAIG)
- Postsecondary Education Participant System (PEPS)
- Electronic Records Management (ERM)



A new way of doing business...

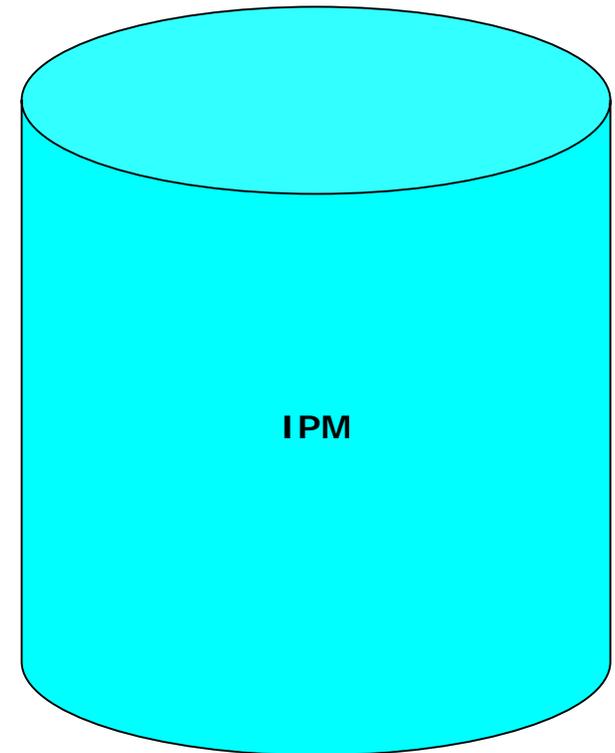


A new initiative called the Integrated Partner Management (IPM) solution provides an end-to-end view of the Federal Student Aid's approximately 10,000 operating partners including Lenders, Servicers, Guaranty Agencies, Schools, Accreditors, State Agencies, and Software Providers.



The IPM solution is designed to consolidate the legacy systems and streamline core partner management processes through:

- Reengineering
- Automation
- Modernization
- Migration of services and data currently being provided by multiple legacy systems



IPM Benefits



Some of the main benefits of IPM include:

- Simplified sign-on
- Consistent user experience
- Ease of use and navigation
- Increased security with a unique entity identifier (Routing Identifier or RID)

User Name:

Password:

Forgot [User Name](#) or [Password](#)



IPM Home

Home | My Account | My Profile | My Learning Page | Integrated Partner Management

Notifications

Date	Subject
11-11-2009 17:41:15	Subscription Book, Financial Aid, and Other Services Available
11-11-2009 22:17:21	Subscription Book, Financial Aid, and Other Services Available
11-11-2009 22:17:38	Subscription Book, Financial Aid, and Other Services Available
11-11-2009 22:18:11	Subscription Book, Financial Aid, and Other Services Available
11-11-2009 22:18:19	Subscription Book, Financial Aid, and Other Services Available

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Actions

- New and Update your personal profile and password
- Factor Management
Declare and Manage your Third Party Service and Auditor Affiliations here
- Program Enrollment
Make Changes to the Institution's enrollment in financial aid programs and services
- Application Title 12 Participation
Update Application, Submit a Recertification, Submit Required annual Financial Statements and Compliance Audit, Request a Waiver, Request and Exemptions

IPM Benefits



Proactive Communications from Federal Student Aid to the Partners

- Streamlines and simplifies, through automation, the required notifications (paperless environment) to/from Federal Student Aid
- Provides eligible Partners with on-line access to entity status and eligibility information



Ease of Use & Consistency

- Single entry point to sign-up for services and maintain eligibility for the Title IV program.
- Provides consistent data

START HERE
GO FURTHER
FEDERAL STUDENT AID

Welcome ipm.partner1

Logout

Integrated Partner Management

IPM Home User Management News Contact Us

IPM Home > User Management

Partner User Admin

Prefix: Select

First Name:*

Last Name:*

Suffix:

Job Title:

Email Address:*

BACK SUBMIT

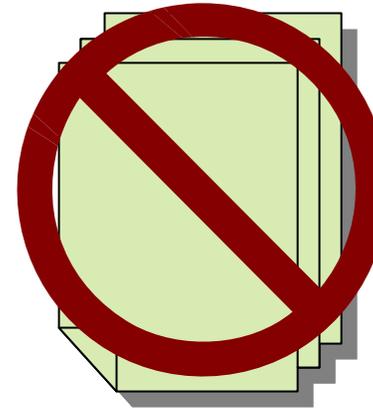
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Reduction of Paper-based Processing

- Introduces usage of the paperless environment thus reducing mail processing and time lag
- Provides the capability for e-Signature on required applications and forms to establish enrollment and maintain eligibility

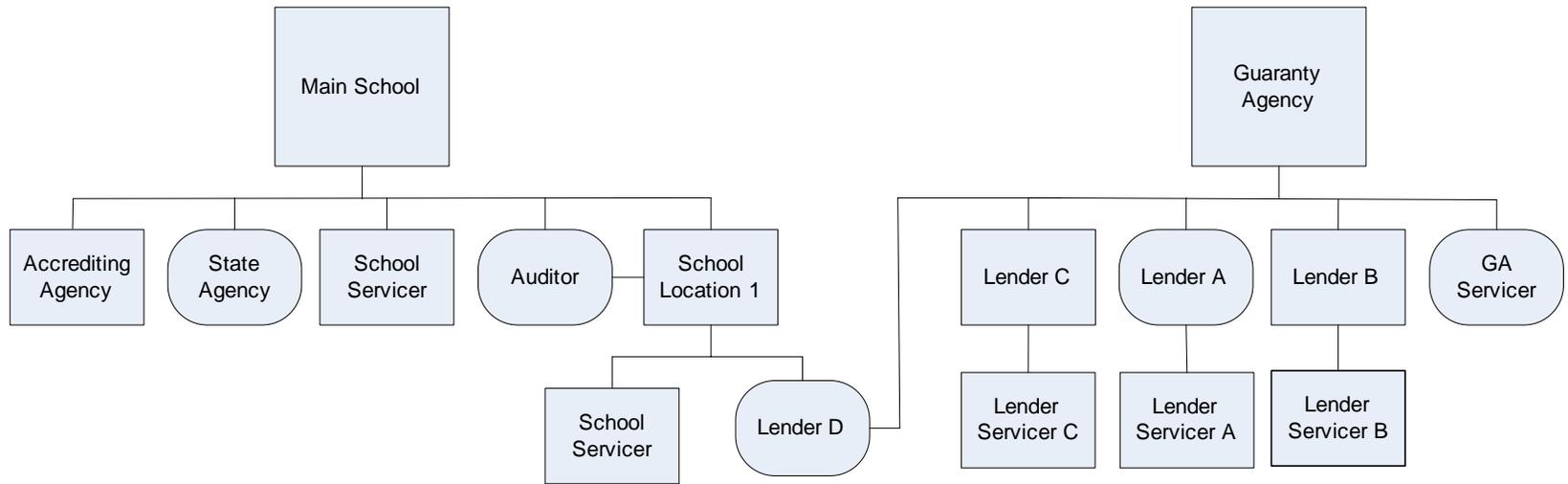


Key Aspects of the IPM Portal



- IPM Workbench will provide the foundation for simplified sign-on to Federal Student Aid systems
- Participation Management Services are consolidated with User Management
- Complex structures allow corporate entities to manage their subsidiaries with a single user experience
- Affiliations provide a mechanism to manage the data and features granted to servicing partners

Structure Example





- **Pre-Development Phase I and Phase II (Requirements and Design)**
 - *Develop detailed Business and Technical Requirements*
 - *Develop high-level and Detailed Design*
- **Phase I Development and Implementation (Enrollment and Eligibility)**
 - *Implement the IPM Portal View using WebSphere, which replaces legacy eAPP, LAP, eZ-Audit and Participation Management (PM) business functions.*
 - *Implement the Document Management Solution using FileNet, which replaces legacy ERM functions.*
 - *Implement a Case Management solution using Siebel, which replaces legacy eAPP and eZ-Audit business functions.*
 - *Retire the ERM, eAPP, and Participation Management (PM), and eZ-Audit legacy business functions.*



- **Phase II Development and Implementation (Oversight)**
 - *Implement a fully automated partner oversight case management solution including Program Reviews using the Commercial-Off-the-Shelf (COTS) products implemented in Phase I*
 - *Develop an IPM Risk Model that is integrated with a rules-based engine to systematically analyze data to identify and prioritize potential risks*
 - *Implement Siebel Analytics & Reporting tool*

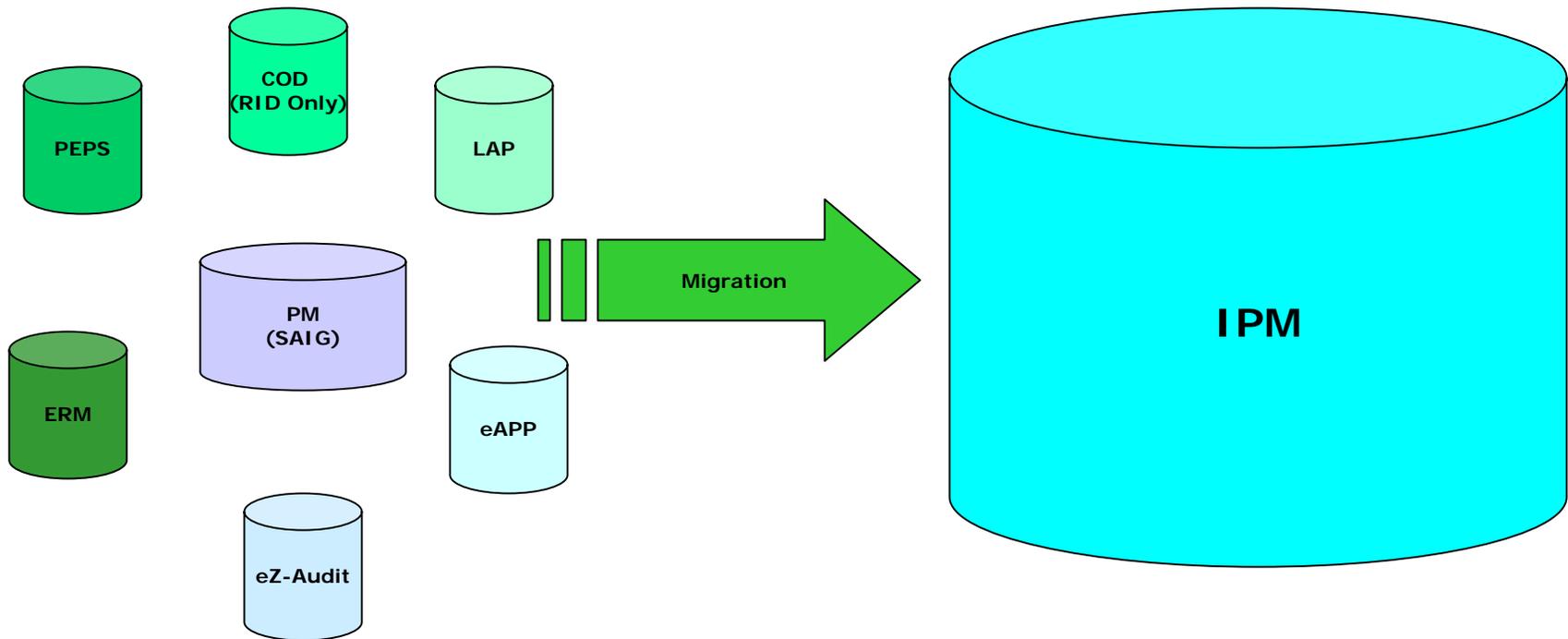


Portal Preview

What about all that data?



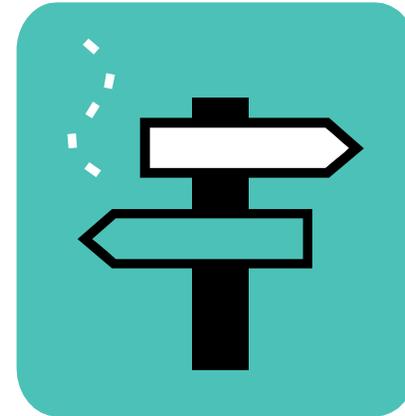
- Provide a scalable, iterative approach to address the data migration needs for IPM.
- Data migration consists of four cycles including the analysis, validation, cleansing and loading of legacy data to the IPM database.



Where are we?



- Developing the IPM Data Mappings in preparation for generating the IPM Data Model
- Continuing writing test scripts in preparation for testing
- Continuing to refine Phase II requirements
- Refining IPM design and actively developing the solution



ID	WBS	Task Name	% Complete	Duration
1842	2.11.2.1	Training and Outreach for IPM Phase 1	30%	301 d
1843	2.11.2.1.1	Manage Training and Outreach for IPM	25%	301 d
1844	2.11.2.1.2	Training for IPM Phase 1	20%	261 d
1845	2.11.2.1.2.1	Manage Training Coordination Committee	15%	170 d
1846	2.11.2.1.2.2	Assess & Plan Training Solution	75%	116 d
1848	2.11.2.1.2.2.1	Define Training Strategy	0%	25 d
1849	2.11.2.1.2.2.2	Design Training Rollout Strategy	0%	15 d
1873	2.11.2.1.4	Outreach for IPM Phase 1	38%	301 d
1874	2.11.2.1.4.1	Conduct Outreach Activities	35%	301 d
1875	2.11.2.1.4.1.1	Update Outreach Process Guide	95%	116 d
1876	2.11.2.1.4.1.2	Conduct Communication/User Readiness Activities	35%	301 d
1877	2.11.2.1.4.2	OMB Activities	0%	161 d
1878	2.11.2.1.4.2.1	M: FSA: Designate OMB Coordinator	0%	0 d
1879	2.11.2.1.4.2.2	Develop Contingency Plan	0%	20 d
1880	2.11.2.1.4.2.3	Gather Copies of Legacy OMB Submission Packages	0%	20 d
1881	2.11.2.1.4.2.4	Analyze Legacy OMB Submission Packages	0%	20 d
1882	2.11.2.1.4.2.5	Compare and Determine Changes being implemented with IPM	0%	25 d



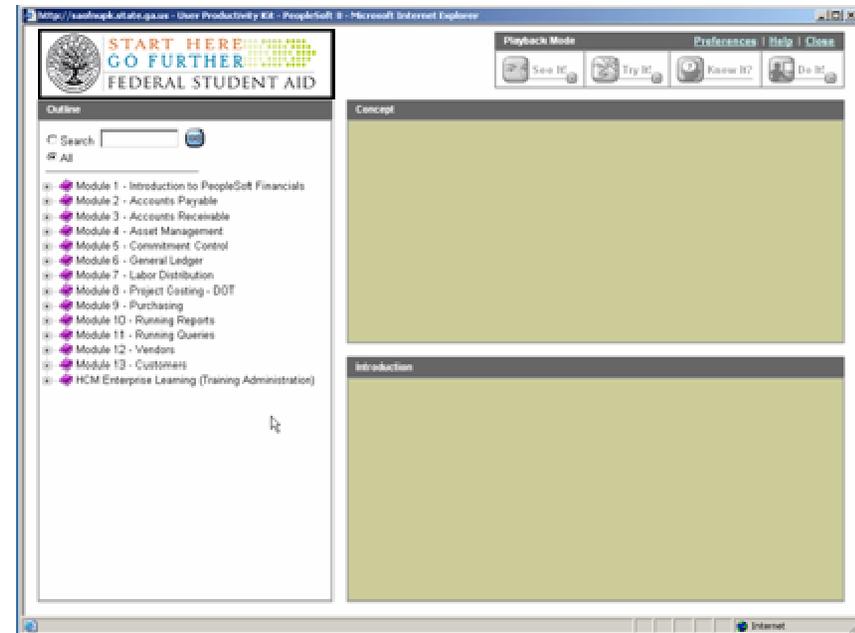
IPM Outreach/Communications:

- Continue to provide IPM project status updates.
- Web-enabled Demonstrations (Summer 2008)

IPM Training:

- Web-based training through Oracle User Productivity Kit (UPK), allowing you to learn IPM from your desktop
- Quick reference guides
- Facilitated distance learning
- Training begins 4 to 6 weeks prior to “go-live”

Sample UPK Screen





With the development effort continuing for Phase I of IPM, the following key milestones are on the horizon:

- Complete Phase I Development & Construction
- Coordinate Data Management and Interfaces
- User Acceptance Testing (UAT)
- IPM Training
- Phase I 'Go-Live'
- Phase II Design & Construction
- Phase II 'Go-Live'





We appreciate your feedback and comments. We can be reached at:

Molly Wyatt, IPM Director

- Phone: 202-377-3358
- Email: molly.wyatt@ed.gov

Susan Stallard, IPM Project Lead

- Phone: 202-377-3628
- Email: susan.stallard@ed.gov

