

Getting It Right Together



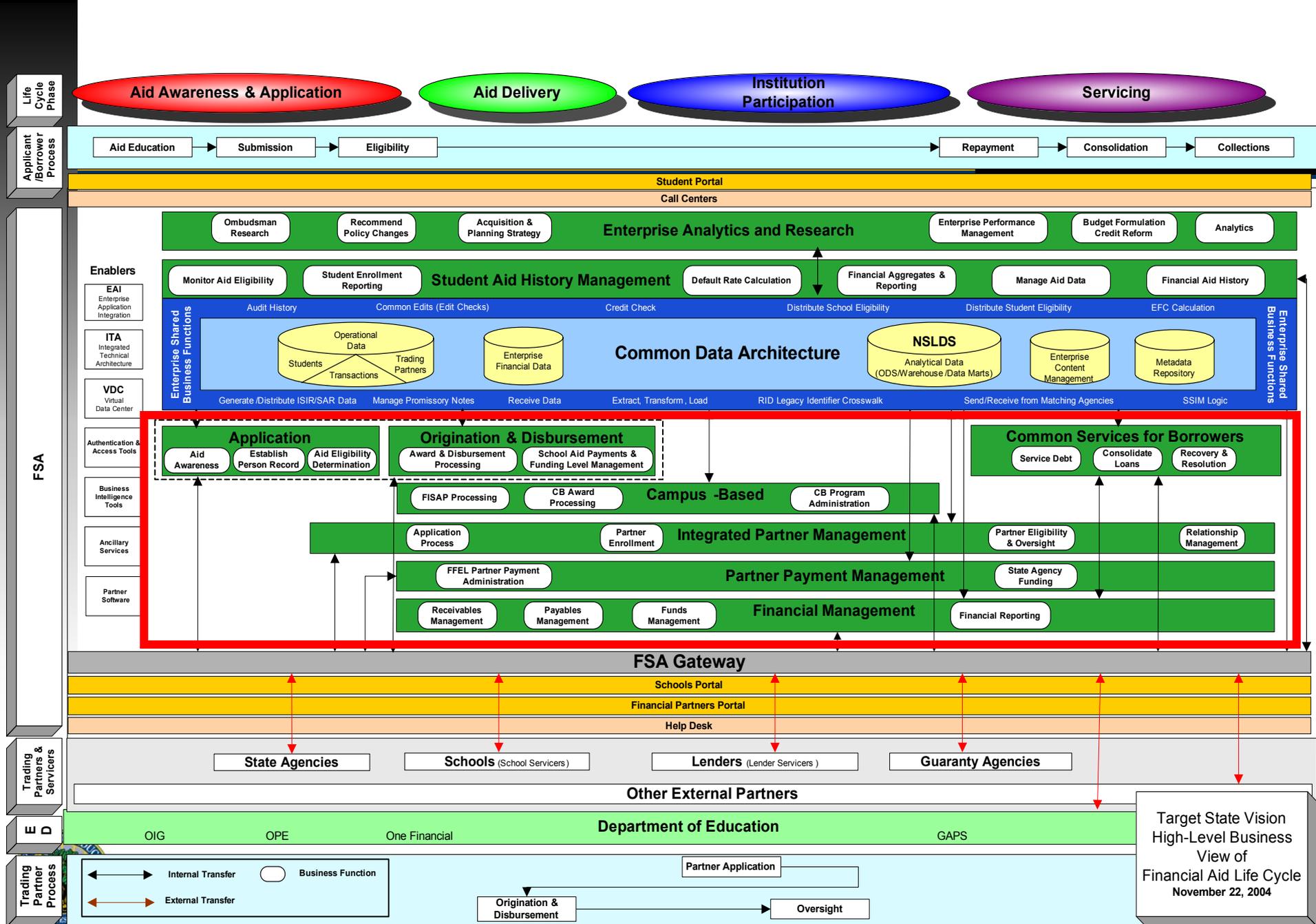
FEDERAL STUDENT AID

We Help Put America Through School

Terri Shaw and Kay Jacks

March 22, 2005

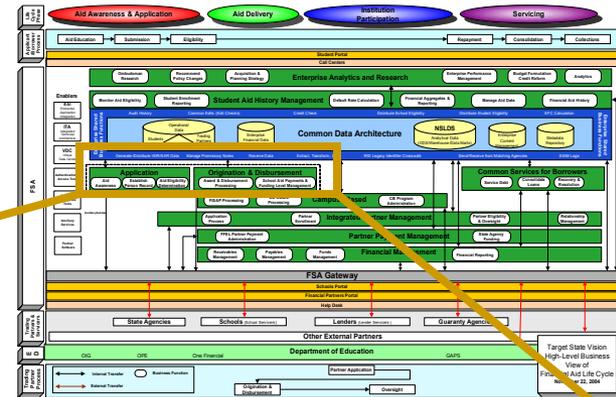




Creating a Vision for the Aid Delivery Process

Target State Vision

Business Capability Areas



Application

Aid Awareness

Establish Person Record

Aid Eligibility Determination

Origination & Disbursement

Award & Disbursement Processing

School Aid Payments & Funding Level Mgmt



Old Project Name

FEBI



New Project Name

ADvance



New Project Name

Aid **D** *elivery* **vance**



ADvance: A School's View

Web Products for Students

Student Aid on the Web, FAFSA on the Web, E-MPN

Web Products for Schools

Schools Portal, FAA Access, COD On-Line, R2T4

Software Products for Schools

EExpress

Application

Aid Awareness

Establish Person Record

Aid Eligibility Determination

Origination & Disbursement

Award & Disbursement Processing

School Aid Payments & Funding Level Mgmt

Supporting Systems

CPS, COD

Help Desk Support

CPS, COD, EExpress, PIN, SAIG



Additional Areas

- Common views and eligibility determination (NSLDS)
- Participation Management Process (SAIG)



Key Changes

- Consolidated system: Application Processing, Origination and Disbursement
- Integrated Customer Service
- Single Help Desk for Schools
- Portal solution with integrated views for students and schools



ADvance Implementation Approach

- Initial Go-Live January 2007 for 2007-08, application processing only
 - Includes system and new tools for customer service (e.g.: integrated views)
- Full award year processing for integrated application, origination and disbursement for 2008-09



ADvance Implementation Approach

■ Risk Mitigation

- Technical Proof of Concept
- Gradual transition of origination and disbursement help desk and system processing
 - Transition of oldest prior years first (lowest volume of transactions)
 - 6 months+ of parallel system processing
 - 6 months+ of “shadowing” help desk



The Opportunity

- ADvance is an opportunity to
 - Define the business needs from multiple perspectives (FSA, schools, students)
 - Re-define the processes to better serve students
 - Update technology to provide more flexible platform for future enhancements
 - Incorporate the principles of data strategy into the target state



Visioning Session Topic Areas

**Student and Family
Perspective**

**School
Perspective**

Aid Awareness and Outreach
Student's Completion of the FAFSA
School's Processing of the Application
Reporting, Requesting and Disbursing Funds
Accounting for Aid Dollars



The Visioning Process

- Solicit Your Feedback
- Synthesize Your Feedback
- Summarize the Results
- Present the Findings



Assumptions

- Pell Grants will continue
- Direct and FFEL Loan Programs will continue
- Paper FAFSA's and the on-line FAFSA will continue; and
- The requirement to tie aid dollars to the students and to schools, and to account to the Federal government for those dollars will continue



Components Calendar

| March 22 Day 1 | March 23 Day 2 | March 24 Day 3 |
|---|--|---|
| General Session Welcome: Terri Shaw Keynote: Susan Patrick Overview: Terri Shaw 9:00 a.m. – 11:30 a.m. | Visioning Session #3 8:30 a.m. – 10:00 a.m. | General Session Laying the Path Forward 9:00 a.m. – 11:30 a.m. |
| Lunch 11:30 a.m. – 1:00 p.m. | Visioning Session #4 10:30 a.m. – 12:00 p.m. | |
| Visioning Session #1 1:00 p.m. – 2:30 p.m. | Lunch 12:00 p.m. – 1:30 p.m. | |
| Break 2:30 p.m. – 3:00 p.m. | Visioning Session #5 1:30 p.m. – 3:00 p.m. | |
| Visioning Session #2 3:00 p.m. – 4:30 p.m. | Refreshments 2:30 p.m. – 3:00 p.m. | |





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