Electronic Access Conference 2000
Get Connected

Student Financial Assistance

We Help Put America Through School
SFA Tools for Schools
Do You Use These?

- The SFA Customer Service Call Center (CSCC)
- The New and Improved IFAP web site
- The Brand new SFA Schools Portal web site
- SFA Technical Support web site and listserv
What is the Customer Service Call Center?

The Customer Service Call Center is a group of highly motivated, highly trained, totally committed group of Federal employees who have the following responsibilities:

- “One Call Does It All”
- Enhancing and maintaining IFAP
- Populating and maintaining the Schools Portal web site
What is Our Mission?

- **Mission Statement**: To foster an improved flow of information and promote customer service ideals in the student financial assistance community.
Services We Provide:

- Respond to calls, letters, and faxes
- Maintain and update information on IFAP and the new School Portal
Customer Service Call Center

• Call the Customer Service Call Center at 1-800-433-7327

• E-mail CSCC at sfa_customer_support@ed.gov

• Fax CSCC at 1-202-260-4199.
Evolution of the Electronic Library

- Fall 1994 SFA introduced the SFABBS
- March 1998 IFAP is launched
- October 1999 IFAP is redesigned
- Winter 1999 Continuing to grow and improve as technology allows
- Fall 2000 Introduction of the School’s Portal
- Fall 2000 IFAP converted…more robust and better searching
The Way We Were

Information for Financial Aid Professionals

IFAP -- An electronic library for financial aid professionals containing publications, regulations, and guidance regarding the administration of the Title IV Federal Student Financial Aid Programs.

..........................What’s New on IFAP?..........................

Click here for a list of last week’s postings!
New and Improved

An electronic library for financial aid professionals containing publications, regulations, and guidance regarding the administration of the Title IV Federal Programs.

SFA NEWS

What's New on IFAP?

Click here for a list of last week's postings!

Publications Visited Most Frequently

Action Letters
Dear Partner (Colleague) Letters
Electronic Announcements
New Federal Registers
SFA Handbooks
IFAP is a site for financial aid professionals, banks, lenders, institutions and guarantee agencies. The IFAP online library contains technical publications, regulations and policy guidance on the administration of the Student Financial Assistance (SFA) program.

**SFALibrary**

Current Publications by Title  Publications by Topic  Archived Publications by Title

**SFANews**  Last Update - Friday, November 10, 2000

No entries

**Most Frequently Visited Publications**

- Action Letters
- Dear Partner (Colleague) Letters
- Electronic Announcements
- New Federal Registers
- Regulations Compilations
- SFA Handbooks

**IFAP Publications Search Tool**

Enter your query (in your own words):

Search

- Advanced Search
- About this Search

*Home* | *Privacy Statement* | *Help*

Copyright © 2000, IFAP. All rights reserved.
There is a wealth of SFA information available to you here. Select the publication you are interested in from the list below.

Accrediting Agencies: "Current List of Nationally Recognized Accrediting Agencies and the Criteria for Recognition by the U.S. Secretary of Education".

Action Letters: All Action Letters from the last 3 award years to the present are available here.

Audit Guides: The January 2000 "Audit Guide for Schools" and much more is available here.

Blue Books: Accounting, recordkeeping and reporting by postsecondary educational institutions for federally funded student financial aid programs.

Campus-Based Program Materials: The FISAP Form and Instructions, the Perkins Cohort Default Rate Booklet, the Notification of Campus-Based Final Funding for Federal Work-Study (FWS), Federal Supplemental Educational Opportunity Grant (FSEOG), and Federal Perkins Loan Programs (FPLP) Default Status Report are available here.

Conferences and Presentations: SFA/ED presentations given at conferences like the "Electronic Access Conferences" and the annual NASFAA conference are available here, in PDF format.

Counselor’s Handbooks: The "Counselor’s Handbooks for Postsecondary Schools" from the 1995-1999 award year are available here.

Dear Partner/Colleague Letters: All Dear Partner/Colleague Letters (DCLs) produced by SFA since the beginning of 1995. Or, go directly to the "type" of letter you are looking for by clicking on the appropriate link below:

- Training Announcements (ANN-type)
- Campus-based Programs (CB-type)
- Disaster Letters Published by SFA
- Guarantor Letters (G-type)
- General Distribution Letters (GEN-type)
SAR/ISIR Reference Materials: "SAR/ISIR Comment Codes", Draft SAR form, ISIR Record Layouts, and "A Guide to SARs & ISIRs" are available here.

SAR/ISIR Comment Codes/Text and Reject Codes/Reasons are distributed as part of A Guide to SARs & ISIRs. For easy retrieval, click on the entries below to access the appropriate award year comment codes/text or reject codes/reasons.

- 2000-2001 SAR/ISIR Comment Codes and Text
- 2000-2001 SAR/ISIR Reject Codes and Reject Reasons
- 1999-2000 SAR/ISIR Comment Codes and Text
- 1999-2000 SAR/ISIR Reject Codes and Reject Reasons

SFA Training Depot: Included information on Training Announcements, Training Guides, and links to Computer Based Training, the SFA University Web Site and other Training Web Sites.

SSCR User’s Guides: The SSCR User’s Guide provides the information needed by school personnel in the Registrar’s Office, Financial Aid Office, and computer or data processing department to participate in the Student Status Confirmation Report process.

Student Financial Aid Handbooks: All ‘SFA Handbooks’ produced by SFA from the 1995-96 award year to the present.

Verification Guides and Worksheets: This guide assists financial aid administrators in completing student application data verification. The “Verification Worksheets” (for independent and dependent students) are also available here.

Verification Worksheets were distributed as part of the “Verification Guides”, until the 1999-2000 award year. For easy retrieval, click on the entries below to access the appropriate award year verification worksheets.

- 2000-2001 Verification Worksheets
- 1999-2000 Verification Worksheets

Many of the publications we make available to you are in Portable Document Format (PDF). PDF files can be viewed using the Acrobat Reader software. To download a FREE copy of the software, click on the icon below.
SFA Library - Publications by Topic

Accrediting Agencies
  Application To Participate

Campus-Based Programs (General Provisions)
  Administrative Cost Allowance (ACA)
  Allocation Of Funds
  Fiscal Operations Report And Application To Participate (FISAP)
  Fiscal Procedures
  Resources
  Transfer Of Funds

Cash Management
  Administrative Capability
  Authorizations (Student/Parent)
  Credit Balances
  Crediting Student Accounts
  Direct Loan Information (EDF)
  Disbursement/Payment
  Early Disbursements
  Excess Cash
  Financial Responsibility
  Late Disbursements
  Maintaining Funds
  Notification/Disclosure
  Payment Period
  Prior-year Charges
  Repayment
  Requesting Funds

FAFSA Processing/SAR-ISIR
  Application Ordering System (AOS)
  Application Ordering System (OAS)
  Comment Codes/Match Flags
  Corrections
Blue Books
06/01/1999
06/01/1999
07/01/1999 Overview of Cash Management
07/01/1999 Disbursing Title IV Program Funds
07/01/1999 Returning Funds
07/01/1999 Department of Education Payment Management System (ED/PMS)

Direct Loan Bulletins
Copy of a Notice printed in the Federal register on Tuesday, October 8, 1996 (Vol. 61, No. 196), that established deadline dates for closure of all Year 1 (1994-95 academic year) and Year 2 (1995-96 academic year) Direct Loan processing. Be sure to read this Notice carefully.
11/01/1996 New 30-Day reporting requirement and Important Telephone Numbers
10/01/1996 Return of Direct Loan Excess Cash
04/01/1996 Draw down instructions for Year Two participants in the William D. Ford Federal Direct Student Loan Program
06/01/1996 Returning Direct Loans to the U.S. Department of Education

Direct Loan School Guides
1990-1996

Dear Partner/Colleague Letters
03/01/1996 Guidance for helping Title IV participants affected by Hurricane Floyd.
03/01/1996 Announcement of Rescheduled Transition from PMS to EDCAPS/GAPS

Federal Registers
The Secretary proposes to amend the regulations governing the student financial assistance programs authorized under title IV of the Higher Education Act of 1965, as amended (title IV, HEA programs). These programs include the campus-based programs (Federal Perkins Loan, Federal Work-Study (FWS), and Federal Supplemental Opportunity Grant (FSEOG) programs), the Federal Family Education Loan (FFEL) Programs, the William D. Ford Federal Direct Loan (Direct Loan) Program, the Federal Pell Grant Program, the State
09/23/1996 Student Incentive Grant (SIG) Program, and the National Early Intervention Scholarship and Partnership (NEISP) Program. These proposed regulations further the implementation of Department of Education (Department) initiatives to reduce burden and improve program accountability. These proposed regulations clarify and consolidate current policies and requirements, make needed changes in the regulatory requirements for the Secretary to
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- Training Announcements (ANN type)
- Campus-based Programs (CB type)
- Disaster Letters Published by SFA
- Guarantor Letters ("G" type)
- Graduates Retraining (GR type)
**Action Letters:** All Action Letters later than the last 3 award years to the present are available here.

Locate documents in this publication using the following methods:

- [By All 1997-1998 Action Letters](#)
- [By All 1996-1997 Action Letters](#)
- [By All 1995-1996 Action Letters](#)
SFA Information for Financial Aid Professionals
U.S. Department of Education

IFAP User Registration

Please use the form below to register with IFAP. The requested information will enable us to better service our partners in the financial aid community.

First Name*: [input field]
Last Name*: [input field]
E-mail*: [input field]
Institution/Organization*: [input field]
City*: [input field]
State*: [input drop-down]

Financial Aid Professional Group*: [input drop-down]

If you selected other for Financial Aid Professional Group, please specify your exact group classification.

Would you like to participate in discussion groups with users of similar interests?  ☐ Yes  ☐ No

* Required Fields

Submit Registration
<table>
<thead>
<tr>
<th>Member Services</th>
<th>IFAP Member Services Menu</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current Publications by Title</td>
<td>• SFA Customer Service Organizations</td>
</tr>
<tr>
<td>Publications by Topic</td>
<td>• Subscription Options</td>
</tr>
<tr>
<td>Archived Publications by Title</td>
<td>• Customized Search</td>
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<td>SFA Customer Support</td>
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The Subscription system was developed to notify you when a new publication has been added to the wealth of information available on the IFAP web site. For your initial visit to this page, please review all subscription options prior to choosing your selection. Based on your subscription selection, summaries of all new additions will be sent to the email address you used during your initial registration process. Please verify that we have your correct email address.

The IFAP system currently has your email address as colleen_miller@ed.gov. Please go to Change My Email Address now if this is not your current email address. After your email address has been updated, you may continue with the subscription process.

ALL registered IFAP customers will automatically receive an electronic mail message that summarizes the new additions to IFAP for the week. IFAP web site updates average 6-10 documents per week. You must visit the IFAP web site (http://ifap.ed.gov) to read, print and/or download the actual documents. To accept the default IFAP Subscription press the submit button at the bottom of this form. If you need more timely updates for specific items choose options 2, 3 and/or 4. Click on the options listed below for further details and selection criteria. You can select more than one option. Even if there is overlap in your selection, the system is designed not to send you duplicate notifications of the same document.

1) Weekly Summary of ALL IFAP Additions (Default Setting)
Choose this option to receive a weekly summary of ALL IFAP additions or deselect the default.

2) Frequently Generated IFAP Additions
Choose this option to receive notification of the six most frequently generated IFAP documents approximately 48 hours after new documents are available.

3) Additional Publications By Publication Type
Choose this option to receive your selection of IFAP additions by Publication Type approximately 48 hours after new documents are available.

4) Additional Publications By Program/Service
Choose this option to receive your selection of IFAP additions by Program/Service approximately 48 hours after new documents are available.

1) WEEKLY SUMMARY OF ALL NEW POSTINGS (Default Setting)
With this option you will receive a weekly summary of ALL IFAP additions, or choose to decline receipt of the weekly summary.
IFAP - Student Financial Aid Handbooks

AwardYear: 1996-1997 EnterChapterNo: 4 EnterChapterTitle: Federal Pell Grant Program SectionNumber: 2 SectionTitle: Calculating the Federal Pell Grant PageNumbers: 9-44 In this section, we will review the basic steps in calculating a award. These steps, in effect, adjust the Pell award to take into account the student's expected family contribution (EFC), the student's enrollment status, and the ability to contribute to his or her education (EFC), the amount of coursework.

CH10-need

1B 215 CHAPTER 10 Financial Need and Packaging Once the school has the necessary information from the Department, it determines the student's financial need and packages the student's aid. In this chapter, we discuss how financial need is determined, and some factors schools must keep in mind when packaging federal aid. FINANCIAL NEED A student must have financial need to receive all SFA funds except for unsubsidized loans under the Direct Loan and FFEL Programs. These loans include...

SFA Handbook - Student Eligibility
New breed of Web site offers...convenient array of features

Set the site as your browser's default home page

Use as an entry point to other Web destinations, and return to day after day

Why go to a portal? In a word, convenience. Unless you have the time and energy to collect and sort through dozens of bookmarks, it's considerably easier to find the services you need at a portal.

There are no hard-and-fast rules about what constitutes a portal.
What Are Portals?

A doorway, an entrance, or a gate, especially one that is large and imposing.

An entrance or a means of entrance: the local library, a portal of knowledge.
Introducing the SFA Portal for Schools........

http://sfa4schools.sfa.ed.gov
Portal Priorities

• Content Management
• Links to SFA Web Enabled Systems
• User Customization

Schools Channel
U.S. Department of Education
Student Financial Assistance

Tuesday, November 7

Content Management

Links to SFA Web Enabled Systems

User Customization

SFA Links

Reference Library
• SFA Publications by Title (IFAP)
• SFA Publications by Topic (IFAP)

Student Data
• NLDSL National Student Loan Data System
• PDLBFMS
• LD Loan Origination System
• DLSS Direct Loan Servicing System
• FAFSA
• Loan Consolidation

Book Store
• Bulk Publication Ordering System
• SFA Download Site
• Technical Publications

Participation & Funding
• GAPPS-Grants Administration and Payment System
• PPRPS-Postsecondary Education Participants System
• Application to Participate and for Repayment

Training/Conferences
• SFA Conferences

SFA Calendar

Events  Deadlines  Training  NPRMs

Monday, November 13
• No Entries For Today
Five (5) Portal Areas

- **SFA Links** - all SFA web-enabled systems
- **SFA Headlines** - categorized as either “SFA News” or “SFA Policy and Rule Changes”
- **SFA Search Tool** - across the “links” and/or within IFAP publications
- **My SFA** - customize the look of Your Portal Home Page
- **SFA Calendar** - Deadline dates, Training/Conference dates, Events and NPRM comment due dates.
SFA Links

Reference Library - Links to the IFAP Publications

Student Data - Links to NSLDS, Pell/RFMS, Direct Loan Servicing, Origination and Consolidation sites

Book Store - Order publications, download software and technical pubs

Participation & Funding - GAPS, PEPS data, E-App

Training/Conferences - SFA University
SFA Headlines presented as either:

• SFA News (Announcements, Dear Partner Letters, etc.)

• SFA Policy and Rule Changes (Federal Registers, Regulation Compilations, etc.)

• “Old” Headlines are archived
Click on “More Headlines” to see the list of archived headlines.
SFA Search

Powerful natural language queries

• Search across the SFA links and within the IFAP publications

• Search only across the SFA Links (up to security pages)

• Search the IFAP publications
Customizing My SFA

Click on “Sign Up Now” to obtain an ID and establish your password

My SFA - Sign Up Now!

USERNAME: Privacy Statement

PASSWORD: CUSTOMIZE YOUR LINKS!

Sign Up for My SFA

Why sign up for My SFA? With our customizable Portal, you can:

- Customize Your Links: You can choose which SFA sites appear in your MY SFA Schools Portal.
- Add Personal Links: You can create and save your own favorite links into the My SFA Schools Portal.

To sign up, please fill out the form below. All fields are required.

Your First Name: (Max 50 characters)

Your Last Name: (Max 50 characters)

Your E-Mail: (Max 100 characters)

Choose a password: (Max 16 characters)

Confirm password: (Max 16 characters)
Customizing My SFA

Enter your Username (ID) and password, then hit the “GO” button to see your choices for customization.
Customizing My SFA

Click on a button below to customize Your SFA!

- Change Password
- SFA Links
- My Bookmarks
Choose the SFA Links You Want to Display

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<td>✓ SFA Publications By Topic</td>
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<th>Student Data</th>
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<td>✓ NSLDS - National Student Loan Data System</td>
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<tr>
<td>✓ Pell - RFMS</td>
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<td>✓ LO - Direct Loan Origination System</td>
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<tr>
<td>✓ DLSS - Direct Loan Servicing System</td>
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<tr>
<td>✓ FAFSA</td>
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<td>✓ Loan Consolidation</td>
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<td>✓ SFA Download Site</td>
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<td>✓ Technical Publications</td>
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<th>Participation and Funding</th>
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<tr>
<td>✓ GAPS - Grants Administration and Payment System</td>
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<td>✓ PEPS - Postsecondary Education Participants System</td>
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<td>✓ Application to Participate and for Recertification</td>
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<th>Training/Conferences</th>
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<tr>
<td>✓ SFA Conferences</td>
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Add Personal Bookmarks to Your Customized SFA Portal Page
An Example of a Customized

“MY SFA” Page

SFA Links*
Reference Library
- SFA Publications By Title
- SFA Publications By Topic

Book Store
- Bulk Publication Ordering System
- Technical Publications

Participation and Funding
- PEPS - Postsecondary Education Participants System

Training/Conferences
- SFA Conferences

Personal Bookmarks
- OPM HomePage
- SFA Intranet
- VRE
- WEB TRENDS

*To return to the portal from an SFA Link, close the browser window.
What’s Happening in SFA? Check the SFA Calendar!

- Title IV deadlines and due dates
- Training and conference opportunities
- Comment due dates for NPRMs
- SFA publication availability
Monthly Calendar View

Friday, November 3

- Calendar Deployment

NPRM Update
- Send comments about this NPRM
Regulation Parts Affected:
- None

NpRM Works
- Send comments about this NPRM
Regulation Parts Affected:
- None

Monday, November 6

- Schools Portal Calendar Test

NPRM Test
- Send comments about this NPRM
Regulation Parts Affected:
- None
Monthly Calendar View of “Events”

**Friday, November 3**
- Calendar Deployment

**Monday, November 6**
- Schools Portal Calendar Test

**Tuesday, November 7**
- Schools Portal Calendar Test

**Wednesday, November 8**
- Schools Portal Calendar Test

**Thursday, November 9**
- Schools Portal Calendar Test

**Friday, November 10**
- Schools Portal Calendar Test

**Saturday, November 11**
- Schools Portal Calendar Test

**Sunday, November 12**
- Schools Portal Calendar Test
Portal Help available on-line, by phone and/or by email!

---

**SFA Schools Portal Help**

Welcome to the SFA Schools Portal Help section. This section will guide you in the use of the SFA Schools Portal. You may also contact the SFA Customer Service Call Center at **1-800-433-7327**, or e-mail them at **sfa_customer_support@ed.gov**.

---

Please choose a topic below to receive help:

- **The SFA Schools Portal**
  - Parts of the SFA Schools Portal

- **SFA Schools Portal Calendar**
  - Using the Calendar

- **SFA Schools Portal Integrated Search**
  - Searching the SFA Schools Portal sites
  - Using the Advanced Search interface

- **My SFA**
  - Logging into My SFA
  - Changing your Password
  - Customizing your SFA Links
  - Adding your own bookmarks
Frequently Asked Questions On-Line

SFA Schools Portal Frequently Asked Questions

Questions

- **General Questions**
  - What is SFA Schools Portal?
  - What is My SFA?
  - What can I customize in the SFA Schools Portal?
  - Can I customize the appearance of the SFA Schools Portal?
  - What browsers does the SFA Schools Portal support?

- **Problems Logging In/User Issues**
  - What do I do if I forgot my username/password?
  - Can I change my user information?
  - I bookmarked my customized My SFA page. Why won’t it load when I click on it?

- **Other Issues**
  - Resizing problems with Netscape

General Questions

What is SFA Schools Portal?
SFA Schools Portal is the Department of Education's Student Financial Assistance Portal. It provides a gateway to other SFA sites, along with displaying SFA News headlines and a calendar of events.

What is My SFA?
My SFA is a customizable version of the SFA Schools Portal. By signing up for a My SFA account, you will be able to choose which SFA site links you see, as well as add your own bookmarks to the list of links.

What can I customize in the SFA Schools Portal?
If you create a My SFA account by clicking on the "Sign Up Now" link in the My SFA panel in the SFA Schools Portal, you can quickly and easily customize your SFA Links panel by choosing which links you see, or adding your own bookmarks.

Can I customize the appearance of the SFA Schools Portal?
Contacts Listing with Phone #s, Email Addresses

Customer Service Centers, Helpful Web sites, Search Pages, Software/Technical Support

Table of Contents

Section A – Customer Service Centers

1. CPS Customer Service (CPS)
2. Debt Collection Service (DCS)
3. Default Management Service
4. Direct Loan Information Centers
5. FAFSA Web Products/FAFSA Express
6. Federal Student Aid Information Center
7. Lender or Guaranty Agency Default Rates
8. National Student Loan Data System (NSLDS)
9. Pell Grant Customer Service
10. Campus Based Programs Customer Service
11. SFA Customer Service Call Center
12. Closed School Branch
13. Title IV WAN
14. Office of the Ombudsman SFA
15. Case Management Teams
16. Direct Loan Client Account Managers (CAMS)

Section B – Helpful Web Sites for Financial Aid Professionals

1. Information for Financial Aid Professionals (IFAP)
2. SFA Download
3. Bulk Publications Ordering System
4. NSLDS Online
5. RFMS/Pell Grant Online
6. Direct Loan Information
7. SFA Tech
8. Federal Student Aid Programs Online Applications
9. Quality Assurance Program
10. SFA Coach
11. SFA University
12. SFA Advisory Committee

Section C – Department of Education Search Pages
Link to Service Descriptions from Table of Contents

11. SFA Customer Service Call Center

**Phone:** 1-800-433-7327  
**Fax:** 202-260-4189  
**E-mail Address:** sfa_customer_support@ed.gov

Contact the SFA Customer Support Call Center for assistance regarding SFA programs and application delivery issues, and the Information for Financial Aid Professionals (IFAP) web page. The SFA Customer Support Call Center serves as your advocate within ED's School Channel Student Financial Aid programs. Can't get the assistance you need? Contact us. We'll make sure that your concerns are addressed within SFA.

12. Closed School Branch

**Phone:** 1-800-266-7346

Contact the Closed School Branch at this number for information to assist students and student loan borrowers adversely affected by the closure of a school or by the false certification of their eligibility to borrow.

Problems that are addressed through an informative brochure available through this number include:

- Unpaid refunds
- Poor quality of education and/or student services
- School certification
- False certification
- Denial of further financial aid
- Unavailable school records

This information also includes other telephone numbers, at the state licensing agencies, which are also excellent sources of information on the propriety, cosmetology and degree granting school that the agencies license to operate. The possible availability or relief through tuition recovery funds or bonds established by these agencies is also indicated.

By request through our receptionist at the above number, or by leaving a message, you can also obtain information, assistance...
Got a Question?

Please send us any questions or feedback. To better process your request and to speed up the response, please provide your name and telephone number. This information will allow us to better serve your needs.

Thank you,

Customer Service Call Center
1-800-433-7327

Click here to send a Portal Question e-mail to the SFA Customer Service Call Center

Friday, November 10

We Help Put America Through School
We Want Your Feedback!

What Do You Think?  How can we improve?
Content/Functionality?  Usability?

Send Portal Feedback

Please send us any questions or feedback. To better process your request and to speed up the response, please provide your name and telephone number. This information will allow us to better serve your needs.

Thank you,

Customer Service Call Center
1-800-433-7327
WHAT’S NEXT: Portal Version 2.0

• The Ability To Distinguish User Groups

• Single sign-on

• Integrated Calendar with NASFAA
SFA Technical Support . . .
http://www.ed.gov/sfatech
SFATECH ... the list serve

SFATECH is an e-mail list (like FINAID-L) for technical questions and concerns about ED’s SFA systems and software.
Information on SFATECH . . .

Including how to subscribe

How do I subscribe?

You subscribe to SFATECH by sending a message from the e-mail address you want the lists information to be sent to or received from. Address the e-mail to listserv@fnet.ed.gov. Leave the subject line blank. In the body of the message, write:

subscribe SFATECH your.firstname your.lastname

For example, if your name is Pat Smith, you would send a message as follows:

TO: listserv@fnet.ed.gov
SUBJECT:
subscribe SFATECH Pat Smith

We will automatically use the e-mail address from which your message is sent.

Please be aware that there is quite a bit of traffic on SFATECH. If you do not want to receive a lot of separate e-mail messages from SFATECH, you should use the daily digest feature, described below.

How do I post messages to the listserv?

You can post messages to the list by addressing them to sfatech@fnet.ed.gov.
Please visit us in the PC Lab.

Don’t forget to complete your evaluations!

Thanks!