

## APPENDIX D. FSA Partner Connect Prototype Screenshots

**Screenshot 1:** Logged in to FSA Partner Connect as a School's Primary Administrator. Primary and Secondary Administrators can manage user accounts associated to their organization through the Account Access Management Center. To add a new user, the Primary Administrator can click "+ Add New User."

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### Account Access Management Center

Manage User Accounts Service Management SAIG Mailboxes Action Required Active Confirmation

**Faulkner University - Florence Center**  Export Org Users to CSV + [Add New User](#)

OPEID: 00100302

#### School Administrators

<b>PRIMARY ADMINISTRATOR</b>	<b>BUSINESS EMAIL ADDRESS</b>
RODGER CLEVELAND	<a href="mailto:ppo.us3r+RODGER.CLEVELAN...">ppo.us3r+RODGER.CLEVELAN...</a>
<b>ELIGIBILITY AND OVERSIGHT ADMINISTRATOR</b>	<b>BUSINESS EMAIL ADDRESS</b>
RODGER CLEVELAND	<a href="mailto:ppo.us3r+RODGER.CLEVELAN...">ppo.us3r+RODGER.CLEVELAN...</a>

Access:  Status:

Last Name	First Name	Account Status	Status Last Updated
CLEVELAND	RODGER	<input type="radio"/> Active	03/09/2023

1 total records

## APPENDIX D. FSA Partner Connect Prototype Screenshots

**Screenshot 2:** To add a new user, the Primary Administrator must first provide the user's demographic information (First Name, Last Name, Suffix (if applicable), and Business Email Address).

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### Account Access Management Center

Manage User Accounts Service Management SAIG Mailboxes Action Required Active Confirmation

Manage Organization Accounts > Add New User

#### Add New User

Account Info      Access      Review and Submit

1      2      3

#### Organization Information ?

ORGANIZATION TYPE	OPEID	ORGANIZATION NAME	ORGANIZATION CITY AND STATE
Postsecondary Educational Institution	00100302	Faulkner University - Florence Center	Florence, AL
INSTITUTION NAME	ASSOCIATED CITY AND COUNTRY		
Faulkner University - Florence Center			

#### User Demographic Information

Please provide the first name, last name, and business email address of the user(s) you wish to add. Administrators can add up to 20 users to their organization at one time. All fields marked with an asterisk (\*) are required.

* First Name	* Last Name	Suffix
<input type="text" value="Michael"/>	<input type="text" value="Angelo"/>	<input type="text" value="Select Suffix"/>
* Business Email Address	* Confirm Email Address	
<input type="text" value="michael.angelo@test.com"/>	<input type="text" value="michael.angelo@test.com"/>	

[+ Add Another User](#)

## APPENDIX D. FSA Partner Connect Prototype Screenshots

**Screenshot 3:** The Primary Administrator then selects the system accesses to grant to the new user. Basic Access to FSA Partner Connect is a default access. In this scenario, the Primary Administrator also selected National Student Loan Data System (NSLDS) Online General Services access.

### Account Access Management Center

Manage User Accounts | **Servicer Management** | SAIG Mailboxes | Action Required | Active Confirmation

Manage Organization Accounts > Add New User

#### Add New User

Account Info | **Access** | Review and Submit

#### Account Information

First Name	Last Name	Business Email Address	OPEID	Organization Name
Michael	Angela	michael.angela@test.com	00100302	Faulkner University - Florence Center

#### Grant Access

Below is the access that will be granted to this account.

System Access
<b>FSA Partner Connect</b>
<input checked="" type="checkbox"/> Basic Access ^
<input checked="" type="checkbox"/> Basic Access
<input type="checkbox"/> Case Management - Eligibility and Oversight v
<input type="checkbox"/> Temporary Access v
<b>Financial Aid Administrator Access to Central Processing System (CPS) Online</b>
<input type="checkbox"/> FAA Access to CPS Online v
<input type="checkbox"/> Institutional Student Information Record (ISIR) Batch Service for CPS v
<b>FAFSA Partner Portal</b>
<input type="checkbox"/> Institutional Student Information Record (ISIR) Batch Service for FPS v
<input type="checkbox"/> FAFSA Partner Portal v
<b>Common Origination and Disbursement (COD)</b>
<input type="checkbox"/> COD Online v
<input type="checkbox"/> Direct Loan Service v
<input type="checkbox"/> Grant Service v
<b>National Student Loan Data System (NSLDS)</b>
<input checked="" type="checkbox"/> NSLDS Online ^

Multiple Access Types can be selected.

General Services

## APPENDIX D. FSA Partner Connect Prototype Screenshots

**Screenshot 4:** In the final step to add a new user, the Primary Administrator must review the granted accesses for the new user and review, acknowledge, and e-Sign the *Responsibilities of FSA Partner Connect Users*.

*Note:* The *Rules of Behavior* and *Privacy Act* in the prototype screenshot will be updated with the *Responsibilities of FSA Partner Connect Users* in production after the implementation of this functionality.

### Account Access Management Center

Manage User Accounts	Service Management	SAIG Mailboxes	Action Required	Active Confirmation
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Manage Organization Accounts > Add New User

#### Add New User

Account Info   Access   Review and Submit

Account Summary ⓘ

First Name	Last Name	Business Email Address
Michael	Angela	michael.angela@test.com

#### FSA Partner Connect Access

System Access
FSA Partner Connect
Basic Access ^
● Basic Access
National Student Loan Data System (NSLDS)
NSLDS Online ^
● General Services

#### Acknowledge and E-sign

Please review the Rules of Behavior and **Privacy Act**. You must view and acknowledge them before proceeding.

View [Rules of Behavior and Privacy Act](#)

<input type="checkbox"/> I <b>acknowledge</b> receipt of, understand my responsibilities, and will comply with the Rules of Behavior for the U.S. Department of Education systems I access.	<input type="checkbox"/> I <b>understand</b> that failure to abide by the linked rules and responsibilities may lead to disciplinary action up to and including permanent loss of access to Federal Student Aid systems.	<input type="checkbox"/> I <b>further understand</b> that violation of these rules and responsibilities may be prosecutable under local, state, and/or federal law.
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Please enter your full legal name exactly as it appears below.

Legal First Name	Legal Last Name
RODGER	CLEVELAND

## APPENDIX D. FSA Partner Connect Prototype Screenshots

**Screenshot 5:** The Primary Administrator can select the 'eye' icon or blue hyperlink to expand and review the *Responsibilities of FSA Partner Connect Users* in a pop-up modal.

*Note:* The *Rules of Behavior* and *Privacy Act* in the prototype screenshot will be updated with the *Responsibilities of FSA Partner Connect Users* in production after the implementation of this functionality.

The screenshot displays the 'Account Access Management Center' interface. At the top, there are navigation tabs: 'Manage User Accounts', 'Servicer Management', 'SAIG Mailboxes', 'Action Required', and 'Active Confirmation'. Below these, a breadcrumb trail shows 'Manage Organization Accounts > Add New User'. The main heading is 'Add New User', followed by a progress indicator with three steps: 'Account Info' (completed), 'Access' (completed), and 'Review and Submit' (current step, indicated by a blue circle with the number 3).

The 'Account Summary' section contains the following information:

Field	Value
First Name	Michael
Last Name	Angelo
Business Email Address	michael.angelo@test.com

The 'FSA Partner Connect Access' section shows a list of system access options:

- System Access
- FSA Partner Connect
- Basic Access
  - Basic Access
- Case Management - Eligibility
  - E-App Case Management

A modal window titled 'Rules of Behavior & Privacy Act' is open, displaying the following content:

### Rules of Behavior

These Rules of Behavior identify responsibilities and expectations for all individuals accessing Federal Student Aid (FSA) systems. By accepting, you confirm that you have reviewed, acknowledge, and agree to the Rules of Behavior listed below.

- Your user ID and password is for official U.S. Department of Education business only.
  - You are individually responsible for ensuring that data/information obtained from FSA systems is not used improperly. A legitimate reason must be present to view data/information contained within FSA systems.
  - You must change your password immediately and notify the appropriate security personnel if your password is compromised, or someone else knows your password. You must never give your user ID and password to another person — including your supervisor(s).

Below the modal, there are three columns of text for acknowledgment:

- I acknowledge** receipt of, understand my responsibilities, and will comply with the Rules of Behavior for the U.S. Department of Education systems I access.
- I understand** that failure to abide by the linked rules and responsibilities may lead to disciplinary action up to and including permanent loss of access to Federal Student Aid systems.
- I further understand** that violation of these rules and responsibilities may be prosecutable under local, state, and/or federal law.

At the bottom, there is a form for 'Please enter your full legal name exactly as it appears below.' with fields for 'Legal First Name' (RODGER), 'Legal Last Name' (CLEVELAND), '\* Full Legal Name' (input field), and '\* Today's Date' (MM/DD/YYYY with a calendar icon). 'Back' and 'Submit' buttons are at the bottom.

## APPENDIX D. FSA Partner Connect Prototype Screenshots

**Screenshot 6:** After acknowledging the *Responsibilities of FSA Partner Connect Users*, e-Signing, and submitting the access form, the Primary Administrator will receive a success banner that states the new user will be contacted at the provided email address to complete the account creation process.

The screenshot displays a success message banner at the top, followed by a navigation menu and a main content area.

**Success Banner:** A green banner with a checkmark icon on the left. The text reads: "Access Form Submitted Successfully" followed by "Thank you. Michael Angelo will be contacted at the provided email address to complete the account creation process." A close button (X) is located on the right side of the banner.

**Navigation Menu:** A horizontal menu with five items, each with a dropdown arrow: "KNOWLEDGE CENTER", "TRAINING", "FINANCIAL AID DELIVERY", "TITLE IV PROGRAM ELIGIBILITY", and "PARTNER CONNECT SERVICES".

**Account Access Management Center:** A section header followed by five dark blue buttons with white text: "Manage User Accounts", "Servicer Management", "SAIG Mailboxes", "Action Required", and "Active Confirmation".

## APPENDIX D. FSA Partner Connect Prototype Screenshots

**Screenshot 7:** The new user will receive an email with a link to the FSA Partner Connect Access Form where they must provide their Phone Number, Date of Birth, and Last Four Digits of SSN (unless being granted to NSLDS, in which a user will be required to provide their full nine-digit SSN). The new user must also review their granted accesses and review, acknowledge, and e-Sign the *Responsibilities of FSA Partner Connect Users*. The new user will receive their granted accesses after submitting the Access Form.

*Note:* The *Rules of Behavior* and *Privacy Act* in the prototype screenshot will be updated with the *Responsibilities of FSA Partner Connect Users* in production after the implementation of this functionality.



### FSA Partner Connect Access Form

Welcome to FSA Partner Connect! Please review and complete the access form below to continue the account creation process.

**Organization Information**

OPEID	ORGANIZATION TYPE	ORGANIZATION NAME	CITY AND COUNTRY
01105900	Postsecondary Educational Institution	University of Oxford-St Antony's College	Oxford, EN
INSTITUTION NAME	ASSOCIATED CITY AND COUNTRY		
University of Oxford-St Antony's College			

**User Information**

All fields marked with an asterisk (\*) are required.

\* First Name: Michael  
\* Last Name: Angela  
Suffix: Select Suffix

\* Business Email Address: michael.angelae@test.com  
\* Phone Number: 7031112222

\* Date of Birth: 01/11/2024  
 I do not have a U.S. Social Security Number

\* SSN: \*\*\*-\*\*-456  
\* Confirm SSN: \*\*\*-\*\*-456

**Access Requested**

System Access

FSA Partner Connect

Basic Access

- Basic Access

National Student Loan Data System (NSLDS®)

NSLDS Online

- General Services

**Acknowledge and E-sign**

Please review the Rules of Behavior and Privacy Act. You must view and acknowledge them before proceeding.

Done [Rules of Behavior and Privacy Act](#)

I acknowledge receipt of, understand my responsibilities, and will comply with the Rules of Behavior for the U.S. Department of Education systems I access.

I understand that failure to abide by the linked rules and responsibilities may lead to disciplinary action up to and including permanent loss of access to Federal Student Aid systems.

I further understand that violation of these rules and responsibilities may be prosecutable under local, state, and/or federal law.

Please enter your full legal name exactly as it appears below.

Legal First Name: Michael  
Legal Last Name: Angela

\* Full Legal Name: Michael Angela  
\* Today's Date: 02/02/2024

Cancel Submit