

# FSA Training on the Direct Loan Program

## Tutorials you can run from your desktop

### **COD Computer-Based Training - (Downloadable PC software)**

The COD System Web site CBT simulates the COD System and functionality available to a school administrator. The CBT allows school staff to practice locating and creating information for Grants and Direct loans and explore the basic functions of the COD Web site through 8 self-paced lessons. The COD System Web Site CBT is upgraded with web site functionality through April 2007 and uses fictitious data for over eight hundred (800) persons and twenty (20) schools. Two new CBT's are also available for Grant and Direct Loan reports. Additionally three separate simulations guide a user through the eMPN process. There is one each for Subsidized/Unsubsidized loans, Grad Plus and Parent Plus loans. These simulate the eMPN process and can be downloaded to your school web site or used for training purposes at college financial aid informational meetings. One additional eMPN simulation is available for the financial aid professional for assistance in eMPN web site functionality specific to the school user.

The program requires a Windows 98 or higher operating system with an ODBC driver for Microsoft Access 2000. Your screen resolution should be set to 1024 x 768 or higher.

[ifap.ed.gov/eannouncements/0928UpdCBTProgforCOD.html](http://ifap.ed.gov/eannouncements/0928UpdCBTProgforCOD.html)

At the very bottom of the document within this link, click on [CBT in Executable Zipped Format; Size 5.34MB](#) to download the file.

### **EDEExpress Basics: A Web-based Tutorial**

Self-paced training that teaches basic skills required to access and navigate the EDEExpress and EDconnect software. A beginning user learns the functionality and practices using the software in a simulated environment. This product is strongly recommended before attending the instructor-led EDEExpress training online. We are pleased to announce the release of the third and fourth modules of EDEExpress Basics. The third module covers Pell grant and Direct loan processing functions. We have also added the Section 508 ADA-compatible version of the training.

*Recommended for financial aid office professionals who have day-to-day responsibilities for using EDEExpress.*

[ifap.ed.gov/edexpress/index.htm](http://ifap.ed.gov/edexpress/index.htm)

### **FSA COACH Web-based Training**

A comprehensive, introductory course on school requirements for administering the Federal Student Aid programs. The 37 lessons can be completed individually and at your own pace, allowing you to tailor the training to your specific needs.

Strongly recommended as a pre-requisite for the "Fundamentals of Title IV" or a follow up to "FA Basics".

[www.ed.gov/offices/OSFAP/fsacoach/index.html](http://www.ed.gov/offices/OSFAP/fsacoach/index.html)

## Web-based training (Webinars)

The department will periodically offer training on Direct Loans through our web tools. These are called webinars. The participant accesses the classroom on their computer in their office. In Fall 2007 we offered training on Direct Loans and COD. We hope to tape that training this Spring 2008 (April 2008) and have it available for schools to access at their convenience. It will incorporate new updates for COD for 0809.

Check the Training Page for availability:

[www.ed.gov/FSA/training](http://www.ed.gov/FSA/training)

## Live training

We offer several venues for live training. Direct Loans are a part of those training offerings.

### **Financial Aid Basics [3-4 days]**

Intended for the new financial aid administrator, Financial Aid Basics is a three-day workshop that provides an introduction to:

- Title IV programs, policies, and procedures
- Important resources available to help you administer the programs and find answers for your questions
- Title IV administrative and financial systems

### **Training at FSA Conferences**

The Federal Student Aid Conferences include hands-on software training and many technical presentations by FSA program experts that provide detailed information on the federal policy requirements and operational procedures.

The next FSA Conference is scheduled for December 2 - 5, 2008  
Las Vegas, NV.

For more information, visit the FSA Conferences page at:

[fsaconferences.ed.gov](http://fsaconferences.ed.gov)

You can view presentations from past conferences at:

[ifap.ed.gov/presentations/07FSAConference.html](http://ifap.ed.gov/presentations/07FSAConference.html)

## Written materials

### Direct Loan School Guide

A concise description of what a school must do to make Direct Loans. Topics include how to determine student eligibility, counsel student borrowers, and pay out loan funds, and report borrower and loan information to the Department.

New release is scheduled to be on the web by the end of March 2008. Check the Direct Loan Home Page (Professionals area) for availability:

[www.ed.gov/DirectLoan](http://www.ed.gov/DirectLoan)

### COD Technical Reference 08-09

The COD Technical Reference is an excellent resource for understanding how Direct Loans and the Master Promissory Note (MPN) are processed through the COD system. Generally, Volume 1, Section II will contain a layman's language description of what has changed from the previous release. Volume II, Section I, titled "Implementation Guide," will explain in layman's language the Origination Process, Disbursing funds, and the processing, and linking, of MPN. Volume VI, the Appendices, contains important information on funding levels, reports and a handy glossary.

For those schools using EdExpress in combination with another software product, Volume III contains an Implementation Guide geared to that type of solution. Volume IV is dedicated to Direct Loan Tools, an FSA product that assists schools in their cash management and reconciliation activities as required in the Direct Loan Program.

The COD Technical Reference can be downloaded in PDF format from:

[www.fsadownload.ed.gov](http://www.fsadownload.ed.gov)

## Web sites

### Direct Loan Servicing Web site — [www.dl.ed.gov](http://www.dl.ed.gov)

The Servicing web site is a wonderful resource for schools and student/borrowers to access detailed account information available from the Direct Loan Servicing System.

#### **Schools**

The Direct Loan Servicing Online School Site provides schools with resources and reports designed to help them effectively manage their Direct Loan Program.

- Account Lookup

Schools are able to view live account data for students including balances, disbursements, account status, and separation dates. They can also review repayment estimates under each repayment plan based on the student's actual loan balance.

- Reporting Tools

Summary and detailed reports are available for entrance counseling, exit counseling, delinquency and portfolio management. Schools may also use the subscription function to select the frequency of how often they would like to receive a particular report.

### **Students/Borrowers**

The Borrower Services Site provides Direct Loan borrowers with several tools to easily manage their student loan account. Borrowers are able to view resources and updates to the loan program, as well as download loan-related forms. With a PIN, borrowers have access to detailed account information, the ability to update or make account changes, make online payments, submit online postponement applications and complete the exit counseling session. A borrower may also use their PIN to initiate a consolidation of their Direct Loans.

### **Direct Loan Home Page — [www.ed.gov/DirectLoan](http://www.ed.gov/DirectLoan)**

This is a directory page for both students and professionals, with links to the Direct Loan services that apply to each audience.

- The STUDENTS page has general information about applying for loans and repaying them, and links to calculators, online loan counseling, and free publications (in PDF).
- The FINANCIAL AID PROFESSIONALS page has online counseling videos, sample MPN materials (in PDF), and other resources for the aid office.