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Electronic Cohort Default Rate Appeals (eCDR Appeals)

Registration and User Account Guide

Version 2.1

March 2, 2009

Document Configuration Control

Version	Release Date	Summary of Changes	Name
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1.0.1	February 24, 2008	Updated Sections 2.2, 2.3, 2.4, 4.1, and 4.2	Federal Student Aid CIO Application Support Team
2.0.1	September 18, 2008	Updated login screen images and added a description of the SA virtual keyboard	Federal Student Aid CIO Application Support Team
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1. OVERVIEW

The Electronic Cohort Default Rate Appeals (eCDR Appeals) Registration and User Account Guide describes the process used to request access to the eCDR Appeals system. For information about how to use the eCDR Appeals system, refer to the *Electronic Cohort Default Rate Appeals Incorrect Data Challenge User Guide*.

1.1 Account Description

ECDR Appeals accounts are Federal Student Aid Security Architecture (SA) accounts. SA provides a simplified sign-on process that gives one account the ability to access multiple systems. For example, users that have registered with eCDR Appeals and the e-Campus Based System can use the same account to access both systems.

1.2 Destination Point Administrators

A Destination Point Administrator (DPA) is an individual that has been designated as an institution's point of contact for user management. DPAs are also responsible for managing all users from their institution. They are responsible for approving user registration requests for their institution and have the ability to revoke a user's access at any time. Each school may have one DPA, and each data manager may have up to two DPAs assigned. Section 2 contains more information on how DPAs register and how they manage users from their institution.

DPAs are vital to the security and integrity of eCDR Appeals and the information stored within the system. It is important that all DPAs carefully review all user registration requests and only approve requests for users with a legitimate need to use the eCDR Appeals system.

DPAs for domestic schools are approved based on their being an existing DPA for eCDR Notification (i.e. they receive the CDR notification through a SAIG mailbox on behalf of their school). All domestic schools are expected to have an eCDR Notification DPA. If your school does not, or the individual registered with Participation Management (PM) for this notification is incorrect, the school will need to contact PM to correct the record for the DPA for eCDR Notification before that individual can be approved for a DPA account for eCDR Appeals. Refer to Section 4 of this guide for PM contact information.

DPAs for foreign schools are approved by the eCDR Appeals System Security Officer, regardless of whether the foreign school has an existing DPA for eCDR Notification. Note: this may change in future cycles.

DPAs for data manager organizations (guarantee agencies and direct loan servicers) are approved by the eCDR Appeals System Security Officer.

1.3 Rules of Behavior

All users of the eCDR Appeals system agree to follow the eCDR Appeals Rules of Behavior. These rules must be followed when using eCDR Appeals. Registering users will be asked to read and acknowledge the Rules of Behavior during the registration process (see Section 2.1). The Rules of Behavior are also listed in Appendix B.

Any violation of the eCDR Appeals Rules of Behavior must be reported to your institution's DPA. Your institution's DPA must report violations to the eCDR Appeals administrators. Contact information is provided in Section 4 of this guide.

1.4 Organization of Document

The remainder of the Electronic Cohort Default Rate Appeals Registration and User Account Guide is structured as follows:

- Section 2, Registration, describes how different kinds of users register for an SA account with access to eCDR Appeals.
- Section 3, User Account Maintenance, describes how users do common tasks like changing their password or setting a new password if they have forgotten their old password.
- Section 4, Support, describes how users can get help if they encounter problems during the registration process.
- Appendices provide a list of acronyms and the eCDR Appeals Rules of Behavior.

2. REGISTRATION

The following section describes how to register for eCDR Appeals access. The process used by users from domestic schools is described in Section 2.1. The process used by data manager users and foreign school users is similar to the domestic school user process described in Section 2.1. Users from data managers and foreign schools should first review Section 2.1 and then review Sections 2.3 (foreign schools) and 2.4 (data managers) for information specific to the registration process used by their type of institution.

Note: If you are registering as a non-DPA user, your school, guarantee agency, or servicer must have a registered DPA. **Your DPA must register first, before other users from within your organization can successfully register.**

2.1 Domestic School User Registration

The registration process described in this section applies to people requesting a non-DPA user account with access to one or more domestic schools. The registration process is divided into six different steps.

2.1.1 Step 1: Confirm Your Identity

The registration process begins on the eCDR Appeals home page (<http://ecdrappeals.ed.gov>). From the home page, click the “Login” menu option located near the top of the page. This loads the eCDR Appeals Login screen (see Figure 2-1).

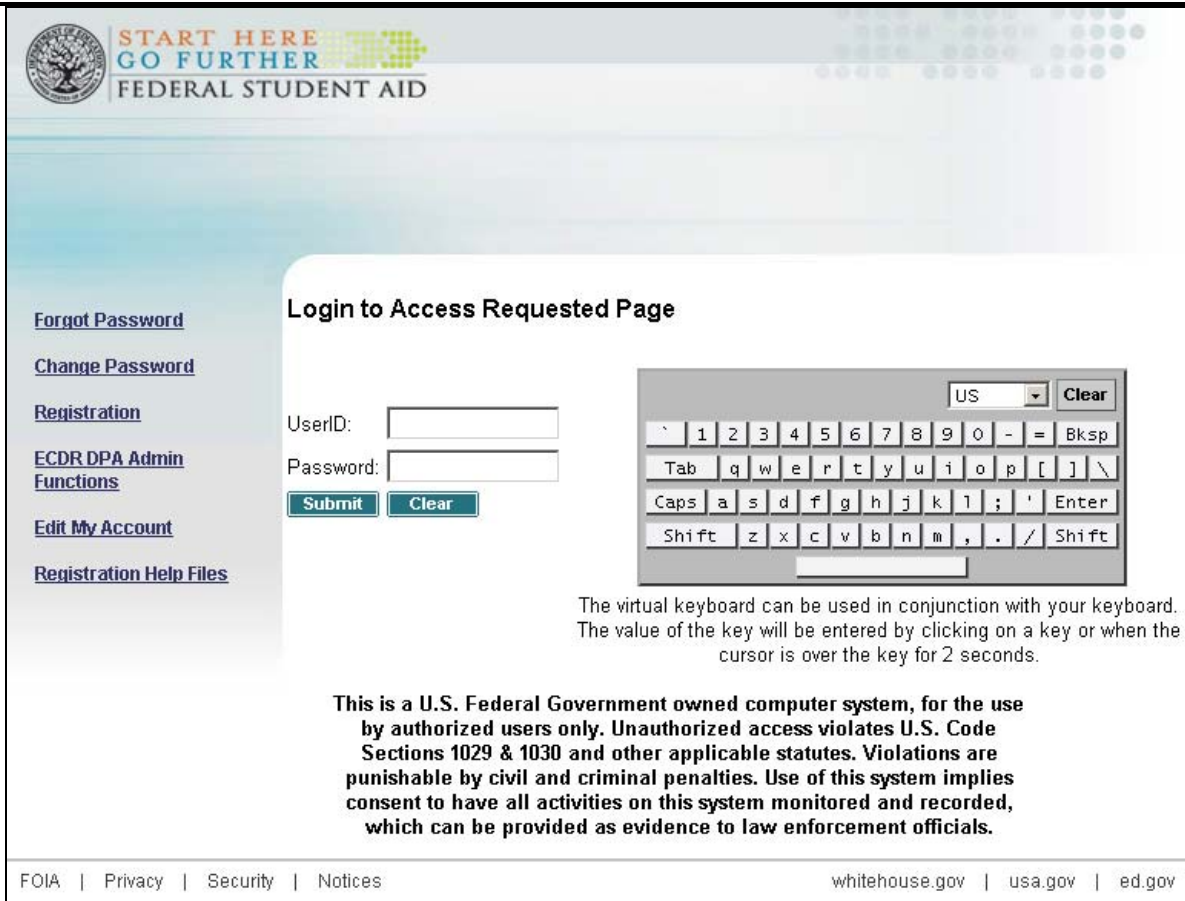


Figure 2-1: eCDR Appeals Login Screen

From the login screen, click the “Registration” link on the left side of the page. This loads the Confirm Your Identity screen (see Figure 2-2).

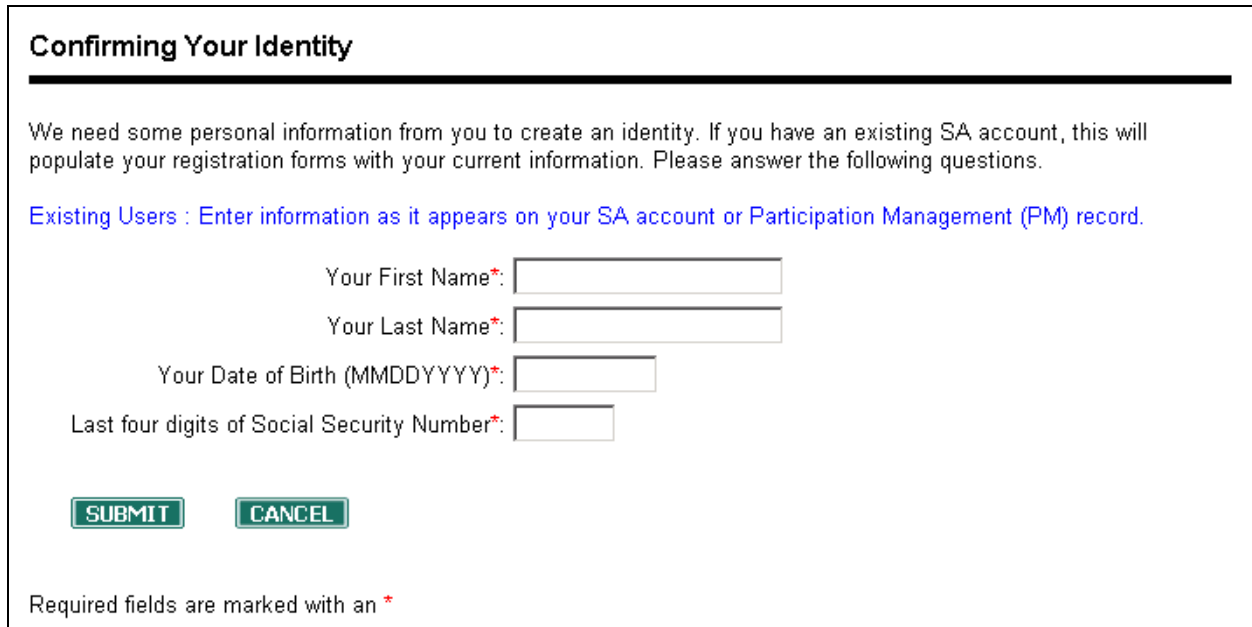


Figure 2-2: Confirm Your Identity Screen

The Confirm Your Identity screen is used to enter the four pieces of information that uniquely identifies you from other Federal Student Aid Security Architecture users. The Federal Student Aid Security Architecture system uses this information to determine whether you have a pre-existing SA account or you need to have a SA account created for you. If Federal Student Aid determines that you already have a SA account, any granted eCDR Appeals access will be added to your existing account.

Enter your first name, last name, date of birth in MMDDYYYY format (e.g. December 1, 1970 would be 12011970), and the last four digits of your Social Security Number. Click the “Submit” button after you have entered your information. If SA finds an existing SA account, the Identity Found screen (see Figure 2-3) is displayed. If SA does not find an existing SA account, the Identity Not Found screen is displayed.

Both screens share similar characteristics: they display the result of the identity search (i.e. identity found or not found), a link to repeat the identity search, and a link to continue with the registration process.

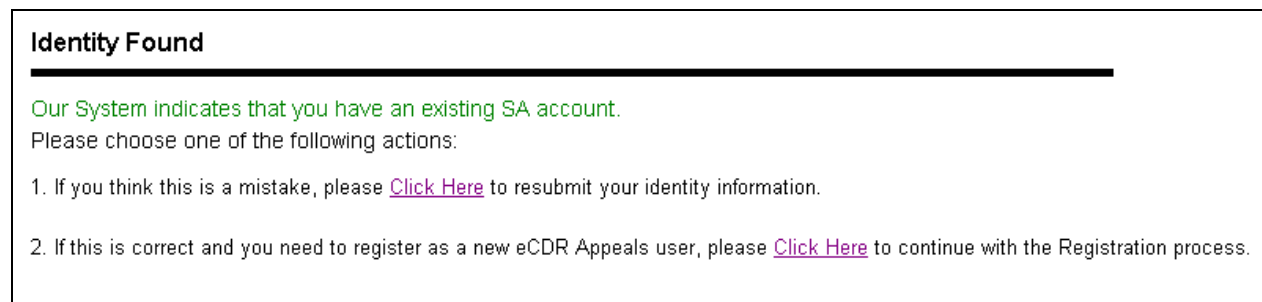


Figure 2-3: Identity Found Screen

If the results of the identity search are incorrect, click the first link. This returns you to the Confirm Your Identity screen. Re-enter your information and click the “Submit” button. If the results are still incorrect, please contact eCDR Appeals support. Contact information is provided in Section 4 of this document.

If the results of the identity search are correct, click the second link to continue with the registration process. If you are a new SA user, you will be taken to the next step of the registration process. If you have a pre-existing SA account, the Security Architecture Login screen will load. Login with your User ID and password to continue to the next step in the eCDR Appeals registration process.

2.1.2 Step 2: Select Your Organization Type

After confirming your identity, the next step in the registration process is to select your organization type. The first screen in this step is the Organization Type Selection screen (see Figure 2-4) that is used to select between registering for a school or a data manager organization.

Organization Type Selection

Please select your organization type for eCDR Appeals*:

School User/School DPA

Data Manager User/Data Manager DPA

Required fields are marked with an *

Figure 2-4: Organization Type Selection Screen

Select “School User/School DPA” and click the “Submit” button. The PM Data Match screen loads (see Figure 2-5)

Participation Management Data Not Found

Your information does not appear to be in Participation Management System. Please choose one of the following actions:

1. If you think this is an error and you are an existing School DPA, please [Click Here](#) and enter your information EXACTLY as it appears in Participation Management System. If you are unable to login with the correct information, please contact the PM Help Desk.
2. If this is correct and you would like to request School user access to eCDR Appeals please [Click Here](#) to continue with the registration.

Figure 2-5: Participation Management Data Match Screen (showing the ‘Not Found’ message)

The PM Data Match screen displays a message stating that your identity information, entered in step one of the registration process, does not match the School DPA information provided by Participation Management. This is the expected message for non-DPA school users.

To continue with the registration process, click the second link on the PM Data Match Screen. This will load the School Type Selection screen (see Figure 2-6). This screen allows you to pick the type of school you are registering for.

School Type Selection

Please select your school type for eCDR Appeals*:

Domestic Schools

Foreign Schools

Required fields are marked with an *

Figure 2-6: School Type Selection Screen

Select “Domestic Schools” and click the “Submit” button. This loads the Demographic Information screen (see Figure 2-7) and moves you to step 3 of the registration process.

2.1.3 Step 3: Enter Your Demographic Information

After selecting your organization type, the next step in the registration process is to enter your demographic information. This is done on the Demographic Information screen (see Figure 2-7). This screen allows you to enter your contact information, the contact information of your supervisor, your password, and your security questions. The use of security questions is described in Section 3.2: Forgot Your User ID or Password. All required fields are marked with an asterisk.

If you have an existing SA account (and were asked to login), the information on the Demographic Information screen will be pre-filled. Please review the information and correct any out-of-date information. Also, the sections for setting your password and your security questions will not be presented on the Demographic Information screen as they have already been established.

Demographics Information

User Identity Information

Full First Name*:
Middle Name:
Last Name*:
Date of Birth (MMDDYYYY)*:
Last 4 Digits Social Security Number*:

Name and Address of School/Data Manager

Organization Name*:
Address 1*:
Address 2:
City*:
State*:
ZIP*:

Contact Information

Work Phone Number*: * * * Ext.
For Federal Student Aid employees and contractors: Please use your Department of Education email address.
Work Email Address*:
Reenter Email Address*:

Security Architecture Password

Your password must be at least 8 characters long, contain at least 4 alpha characters, at least one numeric character and NOT contain any spaces. Your password must NOT contain any fragment (3 or more consecutive letters) of your First or Last Name. Your password must also include at least 2 of the following 3 character types:

- (1) Lower case alpha
- (2) Upper case ALPHA
- (3) Special

Password*:
Reenter Password*:

Supervisor Information

First and Last Name*:
Work Email Address*:
Reenter Email Address*:
Work Phone Number*: * * * Ext.

Challenge Questions

Choose Question #1*:
Answer for Question #1*:
Choose Question #2*:
Answer for Question #2*:
Choose Question #3*:
Answer for Question #3*:

Required fields are marked with an *

Figure 2-7: Demographic Information Screen

After completing all the required fields on the Demographic Information screen, click the “Submit” button. If any errors are detected (i.e. required fields left blank, password not meeting requirements, etc) the screen will reload and display the error messages at the top of the page. After all errors have been corrected, re-click the “Submit” button. This loads the Role and School Selection screen (see Figure 2-8) and moves you to step 4 of the registration process.

2.1.4 Step 4: Select Your School

After entering your demographic information, the next step within the registration process is to select your school (or schools). This is done on the Role and School Selection screen (see Figure 2-8).

Role and School Selection

Select Role*:

- School Case Preparer
- School Case Manager

Please enter the OPEID of the school you need to register for, and click Add. You can add multiple schools one by one. Otherwise please click Search to search for schools.

OPEID*: **ADD** **SEARCH**

Selected Schools*

OPEID	School Name
-------	-------------

REMOVE

PREVIOUS **SUBMIT** **CANCEL**

Required fields are marked with an *

Figure 2-8: Role and School Selection Screen (with no schools selected)

The Role and School Selection screen is used to select the application role that you would like to request and the schools that you want to access using that role. Refer to the *eCDR Appeals Incorrect Data Challenge User Guide* for a description of eCDR Appeals roles.

If you know the OPEID for your school (or schools), enter the full 8-digit number into the “OPEID” field and click the “Add” button. Your school’s name and OPEID will be added to the “Selected Schools” box (see Figure 2-10). If you made a mistake and wish to remove the school, highlight the school by clicking on it and then click the “Remove” button.

If you do not know the full 8-digit OPEID for your school, click the “Search” button. This will load the School Search screen (see Figure 2-9).

School Search

Please define a school search criteria using any or all of the following (Wild card characters like * or % are not needed.):*

OPEID like: and
School Name like:

SEARCH **CLEAR**

Search Results **Selected Schools**

OPEID School Name OPEID School Name

00111100 EAPPEAL SCHOOL B 11111111 EAPPEAL SCHOOL ONE

ADD **REMOVE** **REMOVE ALL**

PREVIOUS **SUBMIT** **CANCEL**

Required fields are marked with an *

Figure 2-9: School Search Screen

The School Search screen can be used to search for a school based on a partial OPEID number or a partial school name. For example, if your school’s OPEID number was 09999200, you could search using 99. All schools with 99 in their OPEID number would then be displayed in the Search Results box towards the bottom of the page. Select your school from the list of search results and click the “Add” button. This will moved the selected school from the “Search Results” box to the “Selected Schools” box. You can also conduct a new search by entering different search criteria and clicking the “Search” button.

Once one or more schools have been added to the Selected Schools box, click the “Submit” button. This will return you to the Role and School Selection Screen. The school (or schools) selected on the School Search screen will appear in the “Selected Schools” box near the bottom of the Role and School Selection screen (see Figure 2-10).

Role and School Selection

Select Role*:

School Case Preparer

School Case Manager

Please enter the OPEID of the school you need to register for, and click Add. You can add multiple schools one by one. Otherwise please click Search to search for schools.

OPEID*:

Selected Schools*

OPEID	School Name
11111111	EAPPEAL SCHOOL ONE

Required fields are marked with an *

Figure 2-10: Role and School Selection Screen (with one school selected)

Once you have selected the desired schools, select one of the available roles, and then click the “Submit” button. This will load the Confirm Role and Schools Information screen (see Figure 2-11) and moves you to step 5 of the registration process.

2.1.5 Step 5: Confirm Your Select Schools

After selecting your school, the next step in the registration process is to confirm the role and schools that you are registering for. This is done on the Confirm Role and Schools Information screen (see Figure 2-11).

Confirm Role and Schools Information

Please review the detailed role and school information below to ensure you have selected the desired role and schools. To modify any answer, click the 'Modify' button at the bottom of the page. If all information is correct, click the 'Submit' button. Once you click Submit, you will not be able to go back and change any of your answers.

Organization Type : [School DPA/User](#)
Role : [School Case Manager](#)

School Information

School OPEID : 11111111
School Name : [EAPPEAL SCHOOL ONE](#)
School Location : [111 North Street](#)
City : [Washington](#)
State : [DC](#)
ZIP : [356111999](#)

Figure 2-11: Confirm Role and Schools Information

The Confirm Role and Schools Information screen lists the application role you are requesting and schools that you want to access using that role. If any corrections are needed, click the “Modify” button to return to the Role and School Selection screen. If everything is correct, click the “Submit” button. This loads the Confirm Registration screen (Figure 2-12) and moves you to step 6 of the registration process.

2.1.6 Step 6: Confirm Your Registration

After confirming your selected schools, the next step in the registration process is to confirm all other information entered during the registration process. This is done on the Confirm Registration screen (Figure 2-12). Verify that the information listed on the Confirm Registration screen is correct. If changes are needed, click the “Modify” button. This returns you to the Demographic Information screen. If the information is correct, review the eCDR Appeals Rules of Behavior. To continue with the registration process, you must agree to follow the rules of behavior listed. Checking the acknowledgement check boxes indicates that you have read the rules of behavior and that you agree to follow them.

Confirm Registration Information

Confirm all of your registration answers. To modify any answer, click the 'Modify' button at the bottom of the page. If all information is correct, click the 'Submit' button. Once you click Submit, you will not be able to go back and change any of your answers.

User Identity Information

Full First Name: [john](#)
Middle Name:
Last Name: [doe](#)
Date of Birth (MMDDYYYY): [11111957](#)
Last 4 Digits Social Security Number: [7788](#)

Organization Name and Address

Organization Name: [Test School](#)
Street: [1st Avenue](#)
Suite, Floor, etc.:
City: [Washington](#)
State: [DC](#)
ZIP: [20202](#)

User Work Phone and Email

Work Phone Number: [\(555\) 555 - 5555](#) Ext.
Work Email Address: [j.d@test.edu](#)
Reenter Email Address: [j.d@test.edu](#)

Supervisor Information

First and Last Name: [My Boss](#)
Work Email Address: [boss@test.edu](#)
Reenter Email Address: [boss@test.edu](#)
Work Phone Number: [\(555\) 555 - 7777](#) Ext.

Challenge Questions

What was the name of the street you lived on when you grew up?: [FirstStreet](#)
In what city were you born?: [Springfield](#)
What was the name of your elementary school?: [SuperSchool](#)

To change demographic information, please click [MODIFY](#)

Rules of Behavior for Schools: Case Preparers and Case Managers
As a School User of the eCDR Appeals, I agree to:

1. Follow all operational instructions provided in the eCDR Appeals User Guide;
2. Secure and maintain the confidentiality of the Loan Record Detail Report (LRDR) received from the Dept of Education at all times;
3. Secure and maintain the confidentiality of supporting material and documentation used for the eCDR Appeals process at all times;
4. Securely store all printed reports from eCDR Appeals;
5. Securely dispose of printed eCDR Appeals reports after the report is no longer needed;
6. Never share my eCDR Appeals account with anyone else;
7. Never disclose my eCDR Appeals account password with anyone else. If anyone asks for my password, I will report the request as a security incident (see rule 10);
8. Either log off eCDR Appeals or lock my workstation if I am logged into eCDR Appeals and must leave my workstation;
9. When finished using eCDR Appeals, I will log off from the application;
10. Inform the eCDR Appeals DPA for my organization of any suspected or actual unauthorized use of eCDR Appeals.

I acknowledge receipt of, and will comply with the "Rules of Behavior" for eCDR Appeals. I understand that failure to follow the above rules and responsibilities may lead to disciplinary action up to and including dismissal. I understand that the information contained in the eCDR Appeals system is protected by the Privacy Act of 1974, as amended, and that the responsibilities include protecting this information against unauthorized disclosure. I further understand that violation of these rules and responsibilities may be prosecutable under local, State, and/or Federal law.

I specifically acknowledge the following criminal penalties imposed by the Privacy Act:
Any person who knowingly and willfully requests or obtains any record concerning an individual from an agency under false pretenses shall be guilty of a misdemeanor and may be fined not more than \$5,000. (5 U.S.C. 552a(i)(3)).

[SUBMIT](#) [CANCEL](#)

Figure 2-12: Confirm Registration Screen

If everything is correct, and the rules of behavior have been acknowledged, click the “Submit” button. This loads Registration Submitted screen (see Figure 2-12).

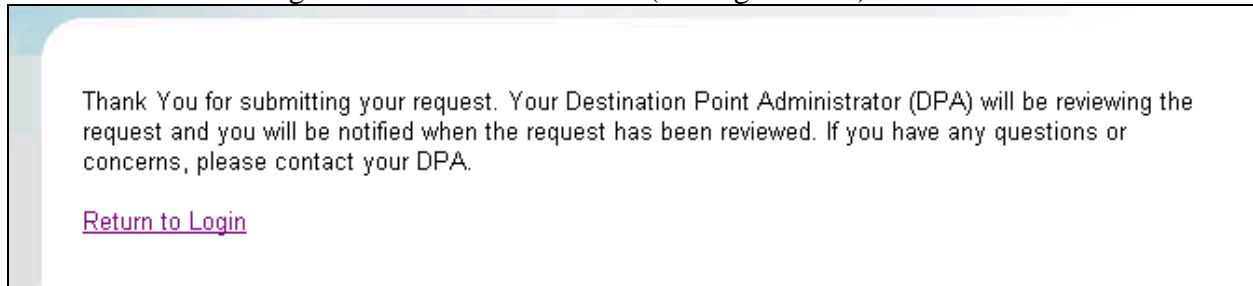


Figure 2-13: Registration Submitted Screen

If the Registration Submitted Screen loads, your registration request has been submitted to the school DPA from each school selected during the registration process. After the school DPA has approved your request, you will receive an e-mail confirming your registration and a second e-mail containing your new SA User ID. If you are registering for multiple schools, you will receive one confirmation email for each school selected during the registration process.

2.2 Domestic School DPA Registration

The registration process for domestic school DPA users is similar to the process described in Section 2.1, with the following exceptions:

- In Step 2, Select Your Organization Type, the Organization Type Selection screen (see Figure 2-4) will not be shown.
- In Step 2, Select Your Organization Type, the School Type Selection screen (see Figure 2-6) appears **before** the PM Data Match screen (see Figure 2-5). During non-DPA domestic school registration, the School Type Selection screen appears **after** the PM Data Match screen.
- In Step 2, Select Your Organization Type, the PM Data Match screen will indicate that the information entered in step 1 (Confirm Your Identity) of the registration process matches the information from Participation Management.
- In Step 2, Select Your Organization Type, if the PM Data Match screen does not show a positive match, click the first link on the screen. This returns you to the Confirm Your Identity screen (see Figure 2-2). Enter your information exactly as it is stored within PM. If you continue to have problems, contact the PM help desk to confirm your information within PM. Refer to Section 4 of this guide for PM contact information.
- In Step 4, Select Your School, the Role and School Selection Screen (see Figure 2-10) has several differences:
 - Three options will be available in the “Select Role” section:
 - School Case Preparer and DPA
 - School Case Manager and DPA
 - DPA Only
 - If you select “DPA Only,” you will only be able to perform the DPA administrative tasks described in this guide. You will not be able to login to the eCDR Appeals system.
 - If you select “School Case Preparer and DPA” or “School Case Manager and DPA,” you will be able to login to and use the eCDR Appeals system as described

in the *eCDR Appeals Incorrect Data Challenge User Guide* in addition to performing the DPA administrative tasks described in this guide.

- The OPEID “Add” and “Search” buttons will not be present. Instead of picking schools, you will be registered for all schools for which you are the eCDR Notification DPA. This list will only be displayed on the Confirm Role and Schools Information screen (see Figure 2-11). If the list of schools is incorrect, contact the PM help desk to correct your information. Refer to Section 4 of this guide for PM contact information

2.3 Foreign School Registration

The registration process for foreign schools is similar to the process described in Section 2.1, with the following exceptions:

- In Step 2, Select Your Organization, when the School Type Selection screen (see Figure 2-6) is displayed, select “Foreign School” instead of “Domestic School”
- In Step 3, Enter Your Demographic Information, the Demographic Information screen (see Figure 2-7) will allow a non-US postal address and non-US phone number to be entered.
- In Step 4, Select Your School, the Role and School Selection screen (see Figure 2-8) looks and functions like the Role and Data Manager Selection screen (see Figure 2-14).
- For foreign school DPAs, your account will be approved by the eCDR Appeals System Security Officer. Your request will not be matched against data stored within the Participation Management system.
- One person can register as a DPA for a foreign school. The DPA for an organization receives e-mail notifications from SA, has the ability to approve/reject registration requests, and can manage users with access to their school.

2.4 Data Manager Registration

The registration process for data managers is similar to the process describe in Section 2.1, with the following exceptions:

- Data Manager DPAs are not matched against the Participation Management system. DM DPA registration requests are reviewed and approved/rejected by the eCDR Appeals System Security Officer
- Up to two people can register as a DPA for a data manager. All DPAs for an organization receive e-mail notifications from SA, have the ability to approve/reject registration requests, and can manage users with access to their organization.
- On the Organization Type Selection screen (see Figure 2-4), select “Data Manager User/Data Manager DPA.”
- The Participation Management Data Match screen (see Figure 2-5) and the School Type Selection screen (see Figure 2-6) are not displayed in the data manager registration process.
- The Role and School Selection screen (see Figure 2-8) is replaced by the Role and Data Manager Selection screen (see Figure 2-14).
 - If you know your DM code, enter it in the “DM Code” field and click “Add”
 - If you do not know your DM code, click the “Search” button. Searching for DM is similar to searching for school OPEID numbers, as described in Section 2.1.

- Selected DM codes appear in the “Selected DMs” table. If you would like to register as a DPA for a selected data manager, check the box in the “Register as DPA” column.

Role and DM Selection

Please enter the DM code you need to register, and click Add. You can add multiple DMs one by one. If you do not know your DM code, please click Search to search for DMs.

DM Code*:

Selected DMs*

Note: To register as a DPA for a selected DM Code, please check the "Register as DPA" box. Registering as a DPA allows you to manage users for the selected Data Manager.

DM Code	Register as DPA	Remove
101	<input type="checkbox"/>	<input type="checkbox"/>

Select eCDR Appeals Role*:

Note: Please select your eCDR Appeals Role. This role applies to All DM Codes selected above:

- Data Manager Response Preparer
- Data Manager Response Manager
- No eCDR Appeals Access (Can manage users; cannot login to eCDR Appeals)

Required fields are marked with an *

Figure 2-14: Role and Data Manager Selection Screen

2.5 How to Approve Requests (for DPAs only)

Destination Point Administrators (DPAs) are responsible for approving/rejecting user requests for their organization. Both school DPAs and data manager DPAs use the process described in this section.

The process begins when a DPA receives an e-mail informing them of a new user request. To process the request, the DPA must login to the DPA Administrator Module. The DPA begins by going to the eCDR Appeals login screen (see Figure 2-1). Once on the login screen, click the “eCDR Appeals DPA Admin Functions” link on the left side of the page. This loads the DPA Login screen (see Figure 2-15).

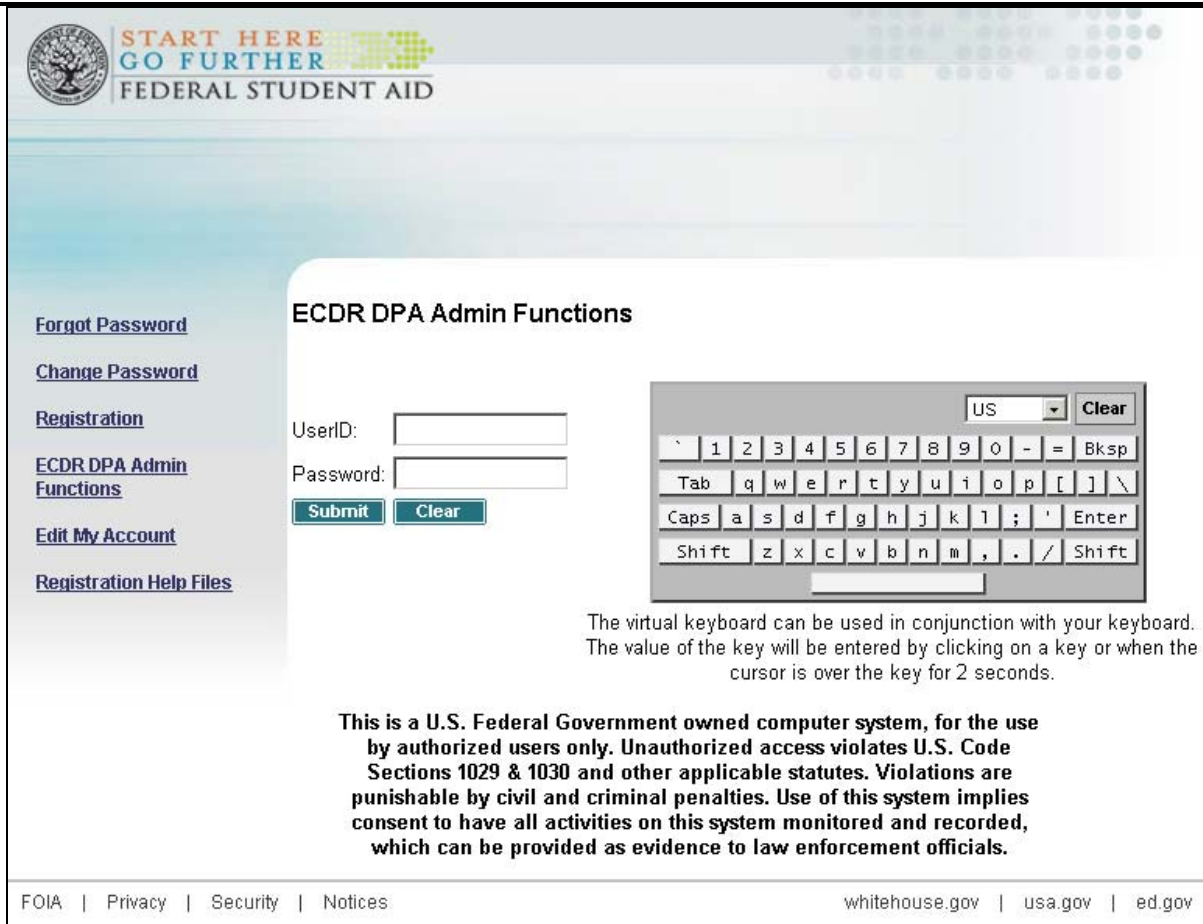


Figure 2-15: the DPA Login Screen

A new feature of the Federal Student Aid Login screen is the virtual keyboard. The virtual keyboard can be used to enter your User ID and password using your mouse instead of your keyboard. Virtual keyboard keys can be “pressed” by clicking them with your mouse or by hovering over the key with your mouse pointer for two seconds.

Enter your User ID and password (either by typing or using the virtual keyboard), and then click the ‘Submit’ button. If you provided the correct User ID, password, and your account has the required account privileges, the eCDR Appeals Administrator Module will load. The first screen that loads is the “DPA Home” screen (Figure 2-16).

The screenshot shows the 'eCDR Appeals DM DPA Home >> Display Pending Requests' page. At the top left is the Federal Student Aid logo with the text 'START HERE GO FURTHER FEDERAL STUDENT AID'. On the left side, there are links for 'Logout' and 'Manage Existing Users'. The main content area has a heading 'eCDR Appeals DM DPA Home >> Display Pending Requests' followed by a paragraph explaining that the following are user requests for eCDR Appeals access to the organization, each row representing a request that must be individually approved or denied. Below this is a 'Filter Display' link with '(filter is currently off)'. A table with three columns: 'Subject', 'Date Submitted', and 'Dm Code' is shown. The table contains one row with the subject 'jon.doe', the date 'Mon Feb 04 13:08:28 EST 2008', and the Dm Code '101'. At the bottom of the page, there are links for 'FOIA', 'Privacy', 'Security', and 'Notices' on the left, and 'whitehouse.gov', 'usa.gov', and 'ed.gov' on the right.

Subject	Date Submitted	Dm Code
jon.doe	Mon Feb 04 13:08:28 EST 2008	101

Figure 2-16: DPA Home Screen

The “DPA Home” screen lists all pending access requests. Each pending request displays the name of the person making the request, the date the request submitted, and your organization’s OPEID (for schools) or DM Code (for data managers). Each name in the list is a link that, when clicked, will open the “Request Detail” Screen (Figure 2-17).

eCDR Appeals DM DPA Home >> Display Pending Requests >> Request Detail

The following are details to the selected request. At the bottom of the page you may choose to approve or reject the request.

Demographic Information of Requestee

User Identity Information

First Name: jon
Middle Name:
Last Name: doe
Date of Birth: 1970-10-10

Organization Name and Address

Organization Name: Average Org
Address #1: 1st St NE
Address #2:
City: Washington
State: DC
ZIP: 20202

Contact Information

Work Phone Number: 5555555555
Work Phone Ext:
Work Email Address: jon.doe@ed.gov

Supervisor Information

First and Last Name: Boss
Work Email Address: boss@ed.gov
Work Phone Number: 5555555555
Work Phone Ext:

Roles

Ecdra Dm Response Manager

Requested Dm Codes

DM Code: 101

Approve / Reject Request

Approve Reject

Comments

Figure 2-17: Request Detail Screen

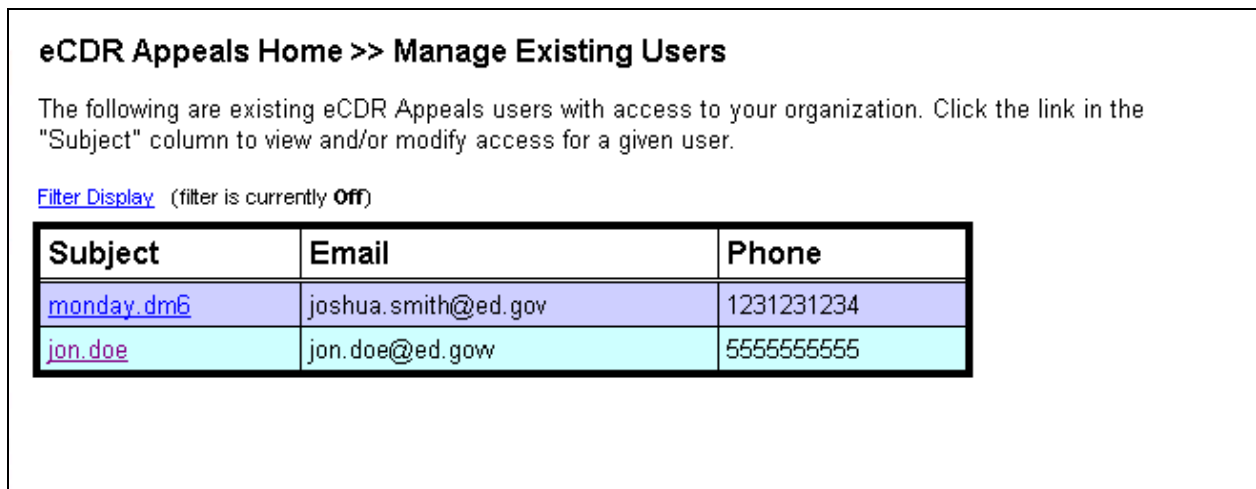
The “Request Detail” screen lists the information provided by the requestor during the registration process. All information, except for the requestor’s password, last 4 Social Security Number digits, and security questions, is displayed on this screen.

At the bottom of the “Request Detail” screen there is a space to approve or reject the request. Select the radio button to the left desired action, enter any comments (optional) into the space provided, and then click the ‘Submit’ button. The “DPA Home” screen will load. The approved/rejected request will no longer be in the list of pending requests.

The requestor will receive an e-mail notifying them of the approval or rejection. The e-mail will also contain the comments entered on the “Request Detail” screen. Once the requestor receives that e-mail, the approved requestor will be able to login to eCDR Appeals.

2.6 How to Modify/Revoke Access (for DPAs only)

DPAs have the ability to view and to revoke user access to their organization. To do so, login to the DPA Administrator Module (as described in Section 2.5). Once on the “DPA Home” screen, click the “Manage Existing Users” link on the left of the screen (see Figure 2-16). This will load the “Existing Users” screen (see Figure 2-18).



eCDR Appeals Home >> Manage Existing Users

The following are existing eCDR Appeals users with access to your organization. Click the link in the "Subject" column to view and/or modify access for a given user.

[Filter Display](#) (filter is currently **off**)

Subject	Email	Phone
monday_dm6	joshua.smith@ed.gov	1231231234
jon.doe	jon.doe@ed.gow	5555555555

Figure 2-18: Existing Users Screen

The “Existing Users” screen lists all users from your organization that have access to eCDR Appeals. Each user’s name, e-mail address, and phone number is listed. Each name in the list is a link, that when clicked, will open the “Existing User Detail” screen (see Figure 2-19).

eCDR Appeals Home >> Manage Existing Users >> DM User Details

The following are the user profile and access details for the given user. You can modify the user's access by clicking the "MODIFY" button below.

User Demographic Information

User Identity Information

First Name: jon
Middle Name:
Last Name: doe
Date of Birth: 1970-10-10

Organization Name and Address

Organization Name: Average Org
Address #1: 1st St NE
Address #2:
City: Washington
State: DC
ZIP: 20202

Contact Information

Work Phone Number: 5555555555
Work Phone Ext:
Work Email Address: jon.doe@ed.gow

Supervisor Information

First and Last Name: Boss
Work Email Address: boss@ed.gow
Work Phone Number: 5555555555
Work Phone Ext:

Roles

Ecdra Dm Response Manager

Access Privileges

Total Schools: 1



 

Figure 2-19: Existing User Detail Screen

The “Existing User Detail” screen lists the user’s identify information (not including the user’s last 4 SSN digits), the user’s organization information, contact information, and supervisor information. This screen also lists the roles assigned to the user.

To return to the “Existing Users” screen, click the ‘Previous’ button. To modify the user’s roles, click the ‘Modify’ button. This will load the Modify User Privileges screen (see Figure 2-20).

View / Modify DM Access Privileges

DM Codes

Dm Code:

101

Change Status: Unchanged

Figure 2-20: Modify User Privileges Screen

To delete a user’s access to your organization, click the “Delete DM Code” button (when dealing with data manager users) or the “Delete School Code” button (when dealing with school users). The “Change Status” value will change from “Unchanged” to “Pending Delete.” To confirm the removal of the user’s access, click the “Submit” button. This will load the “Existing Users” screen. The selected user will no longer appear in the list of existing users and the user will not be able to login to eCDR Appeals.

When the “Change Status” field says “Pending Delete” clicking the “Reset DM Code” button (when dealing with data manager users) or the “Reset School Code” button (when dealing with school users) will undo the pending deletion. Using the “Cancel” button before clicking the “Submit” button will also undo the deletion.

3. USER ACCOUNT MAINTENANCE

This section describes how users can change their password, reset a forgotten password, and what happens when a password expires or an account locks.

3.1 Changing Your Password

You can change your password at any time. To change your password, click the “Change Password” link on the eCDR Appeals Login Screen (see Figure 2-1). This will load the Federal Student Aid Change Password Screen (see Figure 3-1). If you have recently been issued a temporary password, or if your password has expired, you will automatically be taken through this process.



The screenshot shows the "Change Password" screen for the Federal Student Aid system. At the top left is the Federal Student Aid logo with the slogan "START HERE GO FURTHER FEDERAL STUDENT AID". The main heading is "Change Password". Below this are four input fields: "UserID:", "Old Password:", "New Password:", and "Verify New Password:". At the bottom of the form area are two buttons: "Submit" and "Clear". The footer contains links for "FOIA | Privacy | Security | Notices" and the URLs "whitehouse.gov | usa.gov | ed.gov".

Figure 3-1: Change Password Screen

Once at the Change Password screen, complete each of the four fields on the screen. Enter your current password into the “Old Password” field. Enter your new password into the “new Password” field. Re-enter your new password into the “Verify New Password” field. The passwords entered in the “New Password” and “Verify New Password” fields must match. After all fields have been completed, click the “Submit” button.

The Password Change Success Screen will load (see Figure 3-2). Your password has now been successfully changed. Click the “Click here to Return” link to return to the eCDR Appeals home page. You can now login using your User ID and new password.

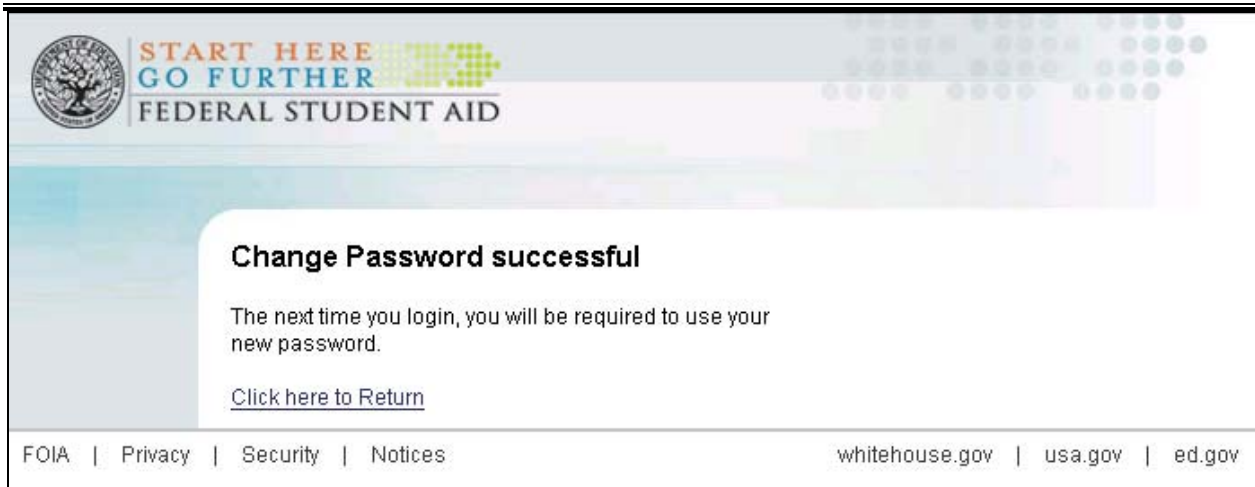


Figure 3-2: Password Change Success Screen

3.2 Forgot Your User ID or Password

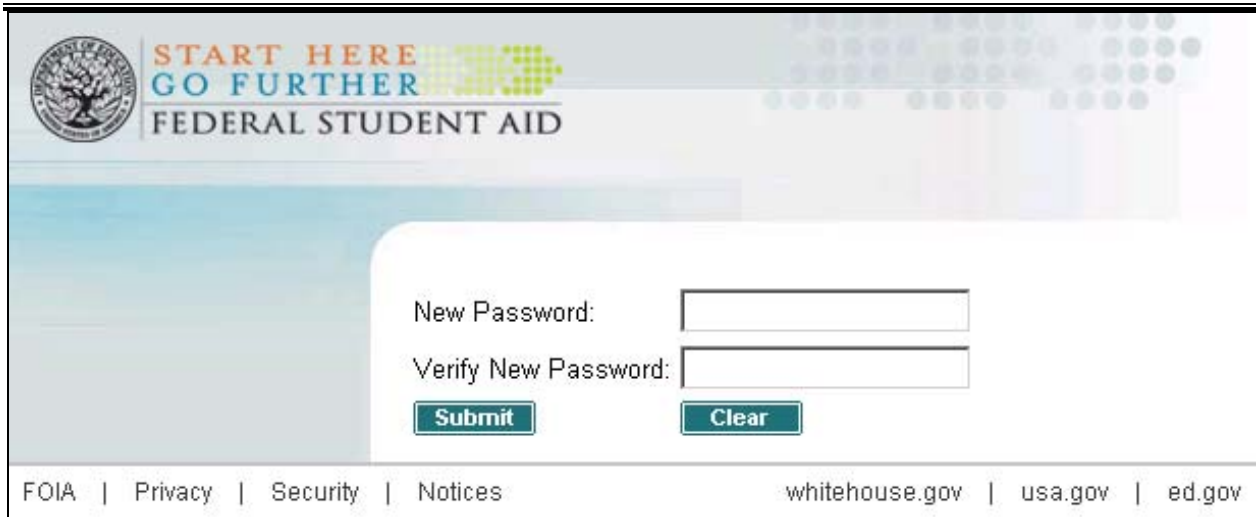
If you do not remember your User ID, please contact eCDR Appeals support. Contact information is provided in Section 4 of this document.

If you have forgotten your password, you can set a new password online. To set your password, click the “Forgot Password” link on the eCDR Appeals Login Screen (see Figure 2-1). This loads a screen asking you for your SA User ID. Enter your User ID and click the “Submit” button. This loads the Federal Student Aid Security Challenge screen (see Figure 3-3).



Figure 3-3: Federal Student Aid Security Challenge Screen

The challenge screen will randomly present you with one of the challenge questions you selected during the registration process. Enter the answer to the question and click the “Submit” button. This loads the Change Password screen showing in Figure 3-4.



START HERE
GO FURTHER
FEDERAL STUDENT AID

New Password:

Verify New Password:

FOIA | Privacy | Security | Notices | whitehouse.gov | usa.gov | ed.gov

Figure 3-4: Change Password Screen for Forgot Password

Enter and confirm your new password and then click the “Submit” button. The Password Change Success Screen loads (see Figure 3-2). Your password has been successfully updated. Click the “Click here to Return” link to return to the eCDR Appeals home page. You can now login using your User ID and your new password.

3.3 Expiring Passwords

Your password will expire every 90 days. When your password expires, you will be prompted to change your password the next time you attempt to login to eCDR Appeals. Section 3.1 describes how to change your password.

3.4 Password Lock-Out

Your SA account will lock after 3 failed login attempts. If you attempt to login while your account is locked, the following message is displayed: “Account has been locked.”

Your account will remain locked for 30 minutes after your last login attempt. During this period, you will not be able to login to eCDR Appeals. If you attempt to login during the 30 minute period, the countdown will reset. After 30 minutes, you can attempt to login again. If you do not remember your password, use the process described in Section 3.2 to reset your password.

If your account does not unlock after 30 minutes, please contact eCDR Appeals support. Contact information is provided in Section 4 of this document.

3.5 Update My Information

If you need to update your demographic information, you can do so at any time. To update your information, click the “Edit My Account” link on the eCDR Appeals Login screen (see Figure 2-1). This loads the Edit Account Home screen (see Figure 3-5).

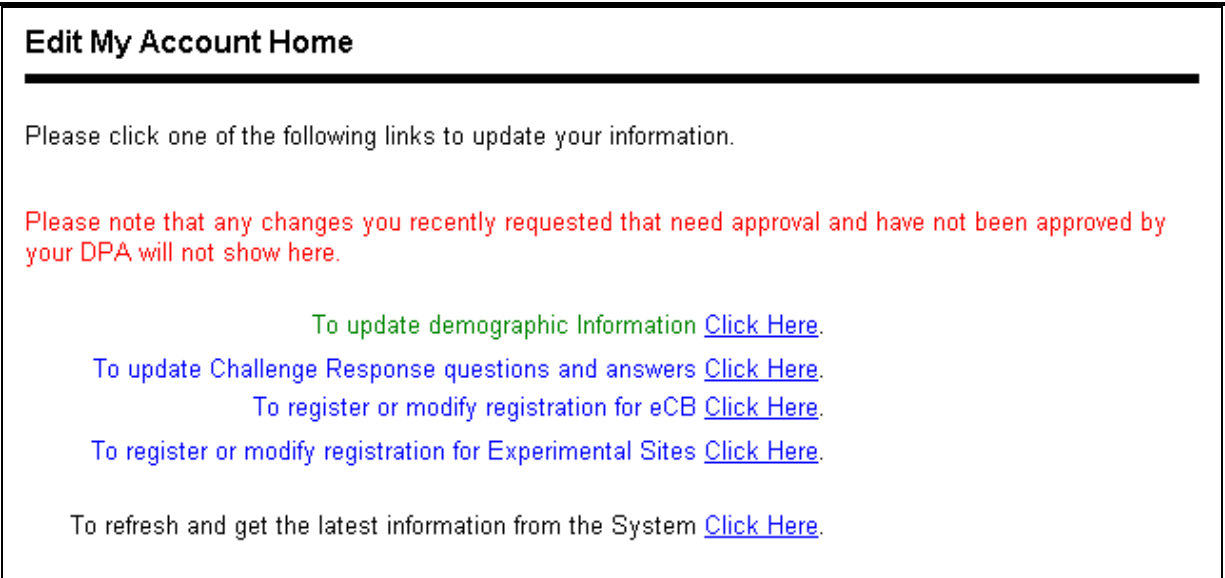


Figure 3-5: Edit My Account Home Screen

To change your demographic information, click the first link. This will load the Demographic Information screen (see Figure 2-7). Your demographic information will be in a read-only format. If you wish to change it, click the “Modify” button. This will reload the page and allow you to update and save new demographic information. If your demographic information is correct, click the “Cancel” button to return to the Edit My Account Home screen.

To change your security questions, click the second link. This will load the Update Security Questions screen (see Figure 3-6). Select three new security questions, answer each question, and click the “Submit” button. Your new security questions will be saved and you will be returned to the Edit My Account Home screen. Click the “Cancel” button to cancel the update.

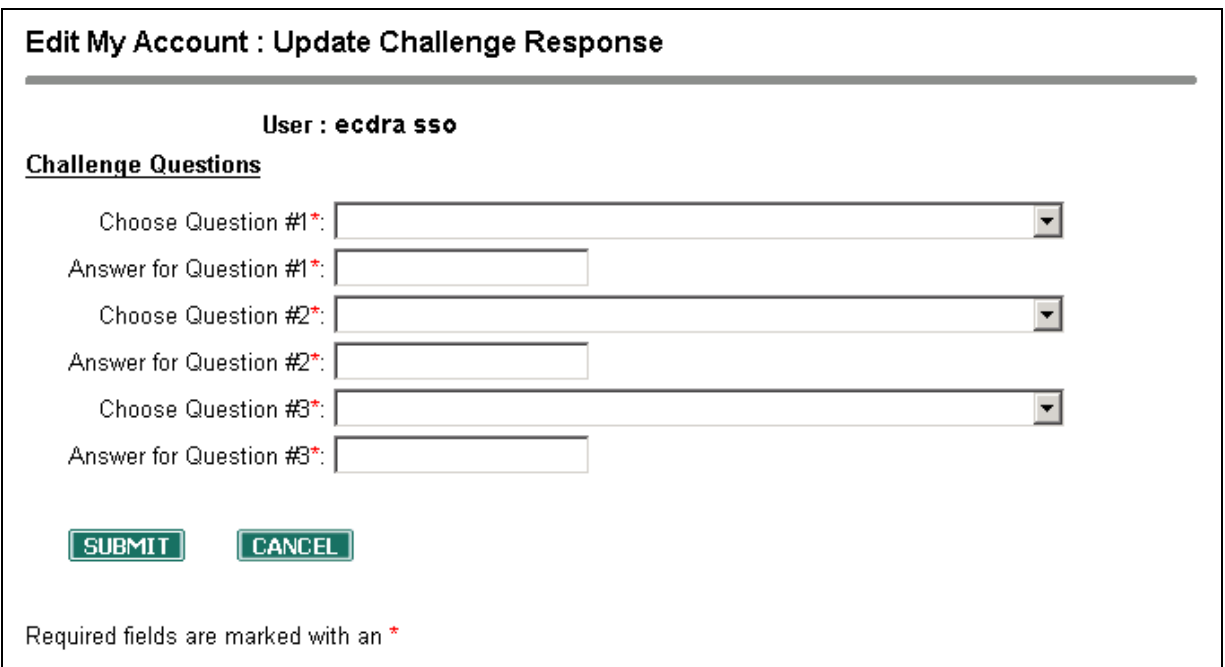


Figure 3-6: Update Security Questions Screen

4. SUPPORT

This section provides a list of contact information as well as several frequently asked questions.

4.1 Contact Information.

If you have questions about, or experience problems, with your Security Architecture account or the registration process, please contact Federal Student Aid's Default Prevention and Management group.

E-mail: fsa.schools.default.management@ed.gov

Phone: 202-377-4259 (Calls responded to within 24-48 hours)

Website: <http://ifap.ed.gov/DefaultManagement/DefaultManagement.html>

4.1.1 Participation Management

If you need to register with Participation Management or correct information stored within PM, please visit the Student Aid Internet Gateway (SAIG) – Enrollment website (<https://www.fsawebenroll.ed.gov>). The SAIG – Enrollment website describes the PM enrollment process. The website can also be used to start the PM enrollment process and to view/update your information within PM.

If you have questions about enrolling with PM, the SAIG – Enrollment website provides a Help page and a Frequently Asked Questions page that answer common questions about using the SAIG – Enrollment website.

If you are unable to find the information you are looking for on the SAIG – Enrollment website, click the SAIG – Enrollment website's "Contact Us" link for information on contacting SAIG Technical Support.

4.2 Frequently Asked Questions

**Question: How do I use the eCDR Appeals system to file an Incorrect Data Challenge?
How do I use the eCDR Appeals system to respond to an Incorrect Data Challenge?**

For information on using eCDR Appeals, please refer to the *eCDR Appeals Incorrect Data Challenge User Guide*. Go to <http://ecdrappeals.ed.gov> and click the "Help" button near the top of the page.

Question: My DPA has approved my registration request, but I have not received the expected e-mail message from Security Architecture. What should I do?

It is possible that a junk mail filter running on your e-mail program caught e-mails sent from Security Architecture. Check your junk mail folder for messages from Federal Student Aid Security Architecture (secarch@ed.gov). To avoid future problems, please ensure that any spam filters/programs used by your institution will accept email from the Security Architecture e-mail address: secarch@ed.gov.

If the e-mail message is not in your junk mail folder, please contact eCDR Appeals support. Contact information is listed in Section 4.1.

Also, if you registered for eCDR Appeals and already had a SA account (which you would have signed in with during the registration process), you will not receive an e-mail containing your account ID from SA. Your ID is the same ID used during registration.

APPENDIX A. ACRONYMS LIST

DM	Data Manager (i.e. guarantee agency or Direct Loan servicer)
DPA	Destination Point Administrator
eCDR Appeals	Electronic Cohort Default Rate Appeals
PM	Participation Management
OPEID	Office of Postsecondary Education ID
SA	Security Architecture
SAIG	Student Aid Internet Gateway

APPENDIX B. ECDR APPEALS RULES OF BEHAVIOR

Rules of Behavior for Schools: Case Preparers and Case Managers

As a School User of eCDR Appeals, I agree to:

1. Follow all operational instructions provided in the eCDR Appeals User Guide;
2. Secure and maintain the confidentiality of the Loan Record Detail Report (LRDR) received from the Dept of Education at all times;
3. Secure and maintain the confidentiality of supporting material and documentation used for the eCDR Appeals process at all times;
4. Securely store all printed reports from eCDR Appeals;
5. Securely dispose of printed eCDR Appeals reports after the report is no longer needed;
6. Never share my eCDR Appeals account with anyone else;
7. Never disclose my eCDR Appeals account password with anyone else. If anyone asks for my password, I will report the request as a security incident (see rule 10);
8. Either log off eCDR Appeals or lock my workstation if I am logged into eCDR Appeals and must leave my workstation;
9. When finished using eCDR Appeals, I will log off from the application;
10. Inform the eCDR Appeals DPA for my organization of any suspected or actual unauthorized use of eCDR Appeals.

Rules of Behavior for Schools: Destination Point Administrators (DPAs)

As a School DPA for eCDR Appeals, I agree to:

1. Follow all rules listed for school users (case preparers and case managers);
2. Only approve eCDR Appeals user account requests from requestors with a valid need to access the eCDR Appeals system;
3. Delete a user's eCDR Appeals account when the user:
 - a. no longer requires access to eCDR Appeals, or
 - b. is no longer employed by the school I represent, or
 - c. has violated the eCDR Appeals Rules of behavior;
4. Report all security incidents (suspected or actual) to the eCDR Appeals administrators, including unauthorized eCDR Appeals access and violations of the eCDR Appeals Rules of Behavior. See Section 4 for contact information.

Rules of Behavior for Data Managers: Response Preparers and Response Managers

As a Data Manager User of eCDR Appeals, I agree to:

1. Follow all operational instructions provided in the eCDR Appeals User Guide;
2. Secure and maintain the confidentiality of the Loan Record Detail Report (LRDR) received from the Dept of Education at all times;
3. Secure and maintain the confidentiality of supporting material and documentation used for the eCDR Appeals process at all times;
4. Securely store all printed reports from eCDR Appeals;
5. Securely dispose of printed eCDR Appeals reports after the report is no longer needed;
6. Never share my eCDR Appeals account with anyone else;
7. Never disclose my eCDR Appeals account password with anyone else. If anyone asks for my password, I will report the request as a security incident (see rule 10);
8. Either log off eCDR Appeals or lock my workstation if I am logged into eCDR Appeals and must leave my workstation;
9. When finished using eCDR Appeals, I will log off from the application;
10. Inform the eCDR Appeals DPA for my organization of any suspected or actual unauthorized use of eCDR Appeals.

Rules of Behavior for Data Managers: Destination Point Administrators (DPAs)

As a Data Manager DPA for eCDR Appeals, I agree to:

1. Follow all rules listed for data manager users (response preparers and response managers);
2. Only approve eCDR Appeals user account requests from requestors with a valid need to access the eCDR Appeals system;
3. Delete a user's eCDR Appeals account when the user:
 - a. no longer requires access to eCDR Appeals, or
 - b. is no longer employed by the data manager I represent, or
 - c. has violated the eCDR Appeals Rules of behavior;
4. Report all security incidents (suspected or actual) to the eCDR Appeals administrators, including unauthorized eCDR Appeals access and violations of the eCDR Appeals Rules of Behavior. See Section 4 for contact information.

Rules of Behavior Acknowledgement

I acknowledge receipt of, and will comply with the "Rules of Behavior" for eCDR Appeals. I understand that failure to abide by the above rules and responsibilities may lead to disciplinary action up to and including dismissal. I understand that much of the information contained in the eCDR Appeals system is protected by the Privacy Act of 1974, as amended, and that my responsibilities include protecting this information against unauthorized disclosure. I further understand that violation of these rules and responsibilities may be prosecutable under local, State, and/or Federal law.

I specifically acknowledge the following criminal penalties imposed by the Privacy Act:

Any person who knowingly and willfully requests or obtains any record concerning an individual from an agency under false pretenses shall be guilty of a misdemeanor and may be fined not more than \$5,000. (5 U.S.C. 552a(i)(3)).