

# Electronic Cohort Default Rate Appeals (eCDR Appeals)

## Loan Servicing Appeal (LSA) User Guide

**Version 5.0.0**

**6/6/2019**

*DOCUMENT VERSION HISTORY*

Version	Release Date	Summary of Changes	Name
(1.0.1)	September 11, 2013	Initial user guide to coincide with the releases in production of LSA functions through the School	Federal Student Aid TO-ADG Business Analysis
4.0.0	September 15, 2013	Initial user guide for Loan Servicing Appeals functions placed in production on 9/15/2013. Functions cover LSA process from School initiating its case through School submitting its Perfected LSA case to FSA. Approved Final.	Federal Student Aid TO-ADG Business Analysis Team
4.1.0	December 15, 2013	Revisions for functions deployed 12/15/2013. Case processing after the perfected case has been submitted to FSA is now described in Chapters 17 through 20. Conforming changes were also made to Chapters 1.3, 1.4, 16.10, 21.1, and 26 (Appendix B). Chapter 1.4, 2.4, 12.1, 13.2 and 18.1 now note browser compatibility considerations when a ZIP/compressed file has been uploaded. Minor editorial changes were made throughout.	Federal Student Aid TO-ADG Business Analysis Team
5.0.0	6/6/2019	Complete rewrite based on eCDRA Release 5 and current FSA look and feel guidance.	Federal Student Aid CIO Application Support Team

## Table of Contents

Introduction .....	8
Overview .....	8
Cohort Default Rates .....	8
Purpose of the eCDR Appeals Application .....	8
Who uses eCDR Appeals .....	8
User Guide Structure .....	9
Purpose and Scope of the LSA User Guide .....	9
All Users .....	10
Registration and user account .....	10
Destination point administrators .....	10
Navigation .....	10
Profiles .....	13
Perspectives .....	13
Menus .....	14
Tables .....	14
General information .....	21
School .....	23
Navigation .....	23
Profiles .....	23
Perspectives .....	25
Menus .....	26
Documents .....	26
School spreadsheet .....	26
Cases for schools .....	30
Current cases (school view) .....	30
Past cases (school view) .....	31
Case (school view) .....	32
Case information .....	32
Case workflow actions .....	33
Case actions .....	34
Comments .....	34

Initiating a new LSA .....	35
Preparing the servicing records request for the LSA .....	37
Request servicing records .....	38
Preparing the LSA for submission to FSA .....	38
Certifying the LSA for FSA .....	41
Decertifying the LSA before submitting to FSA .....	42
Submitting the LSA to FSA .....	43
Withdrawing the case .....	44
Responding to Fee Request (in general) .....	44
Show perfected .....	45
Show all .....	46
LSAppeal .....	47
LSAppeal information .....	47
LSAppeal processing actions .....	48
LSAppeal DM .....	48
LSAppeal DM information .....	48
LSAppeal DM workflow actions .....	50
LSAppeal DM actions .....	50
Comments .....	50
Withdraw request .....	51
Request clarification .....	53
Reports (for schools) .....	54
Current status .....	54
CDR Changes .....	56
Data Managers .....	57
Navigation .....	57
Profiles .....	57
Perspectives .....	58
Menus .....	58
Documents .....	59
Servicing records information .....	59
Case lists .....	62



eCDR Appeals  
UDA User Guide

Current cases (DM view).....	63
Past cases (DM view) .....	64
Case.....	65
Case information.....	65
Case workflow actions (DM user).....	66
Case actions (DM user) .....	67
Comments .....	67
Sample records.....	68
Request fees.....	69
Update Fee Request Outcome.....	71
Amending fee disposition .....	73
Provide servicing records.....	73
LSAppeal DM .....	75
LSAppeal DM information .....	75
LSAppeal DM processing (workflow) actions .....	76
LSAppeal DM actions .....	77
Comments .....	77
Provide clarification.....	77
Providing additional information to FSA .....	78
Change Data Manager.....	79
Reports (for Data Managers).....	82
Current Status (for DM).....	82
Draft Cycle (for DM) .....	85
Official Cycle (for DM).....	86
OPD/FSA.....	88
Navigation .....	88
Profiles.....	88
Perspectives .....	94
Menus.....	95
Loading requisite files.....	96
Loan Records Detail Report (LRDR) .....	96
List of schools under sanction.....	101

Cohort Default Rates (CDR).....	103
Documents .....	104
Decision Letter .....	105
Decision Letter Enclosures .....	106
Work papers .....	107
Case lists.....	109
Current cases .....	109
Past cases .....	111
Case.....	112
Case information.....	112
Case workflow actions (FSA user) .....	114
Case actions (FSA user).....	114
Perform caseworker review.....	114
Complete caseworker review .....	116
Perform case manager review .....	116
Return to caseworker for re-review .....	117
Close case .....	117
Show perfected.....	118
Show all .....	119
LSAppeal.....	120
LSAppeal information.....	120
LSAppeal workflow actions .....	121
Adjustment actions.....	122
LSAppeal DM .....	122
LSAppeal DM information .....	122
LSAppeal DM processing (workflow) actions .....	123
LSAppeal DM actions .....	123
Comments .....	124
Request more data from Data Manager .....	124
Reports for FSA.....	126
Current Status (for FSA) .....	126
Draft Cycle (for FSA).....	128

eCDR Appeals  
UDA User Guide

Official Cycle (for FSA).....	130
PEPS .....	132
Administrative .....	134
Admin .....	136
Manage LRDR Requests .....	136
Manage Due Dates .....	136
Upload CDR.....	141
Upload Sanctioned List .....	141
Manage Cycles .....	142
Manage LRDR Scheduler .....	144

## Introduction

### Overview

#### Cohort Default Rates

The U.S. Department of Education (the Department) calculates Cohort Default Rates (CDRs) for schools that participate in the Federal Family Education Loan (FFEL) Program and the William D. Ford Federal Direct Loan (Direct Loan) Program. This CDR forms an important basis for a school's eligibility to continue participating in the federal student aid programs.

The Department releases CDRs twice each year: draft cohort default rates in February and official cohort default rates in September. After receiving their cohort default rates from the Department, schools have an opportunity to challenge their draft cohort default rates and/or appeal their official cohort default rates.

There are ten types of challenge/appeal processes. Each of these processes involves the exchange of information between the Department and the school that invokes its right to challenge/appeal. Additionally, data managers must in some cases respond to the school's request and/or provide supporting evidence for or against the school's challenge/appeal.

#### Purpose of the eCDR Appeals Application

The Electronic Cohort Default Rate Appeals (eCDR Appeals) system is a Web-based application that facilitates the exchange of information between parties for four of the challenge/appeal processes:

- Incorrect Data Challenge (IDC)
- Uncorrected Data Adjustments (UDA)
- New Data Adjustments (NDA)
- Loan Servicing Appeals (LSA)

The eCDR Appeals application allows schools to submit these challenges and appeals during the cohort default rate appeal cycle. The application tracks the entire life cycle of each challenge/appeal case from submission to final decision.

Using eCDR Appeals helps cut down on paperwork and speeds up the appeal or challenge process. It also allows for greater protection of personally identifiable information.

#### Who uses eCDR Appeals

Three types of organizations use the eCDR Appeals system:

- **Schools:** Institutions that participate in the FFEL and/or Direct Loan programs

- **Data Managers:** Any one of these organizations: Direct Loan Servicer, guaranty agency, or Federal Student Aid Operations Performance Division
- **OPD:** Operations Performance Division (OPD), an office within Federal Student Aid

## User Guide Structure

This user guide has four main sections for different types of users. One section contains information that is common for all users. A second section contains information for school users. A third section contains information for Data Managers. A fourth section contains information for OPD or FSA users.

## Purpose and Scope of the LSA User Guide

This user guide is meant to be referred to by users if they have questions or wish to find more detail on the functions and features of the online application. Users may look up information based on what they are working on (e.g. case, adjustment, etc...), or the action they wish to take (e.g. submit a case, request clarification, etc...)

This user guide complements the **Cohort Default Rate Guide**. In the event of any discrepancy between this user guide and the **Cohort Default Rate Guide**, the **Cohort Default Rate Guide** is the authoritative source for regulatory considerations and constraints.

The **Cohort Default Rate Guide** is available online at:  
<https://ifap.ed.gov/DefaultManagement/finalcdrg.html>

## All Users

### Registration and user account

In order to access eCDR Appeals, you must obtain an AIMS user ID. Please refer to the ***Electronic Cohort Default Rate Appeals Registration and User Account Guide***, which explains how to register and obtain access to eCDR Appeals.

### Destination point administrators

Account requests submitted via the eCDRA self-registration site are approved, or disapproved, by the Destination Point Administrator (DPA). The account request cannot be submitted without a designated DPA so organizations, particularly schools, should make sure that they have one assigned. The web site to sign up as DPA is <https://fsawebenroll.ed.gov/>

### Navigation

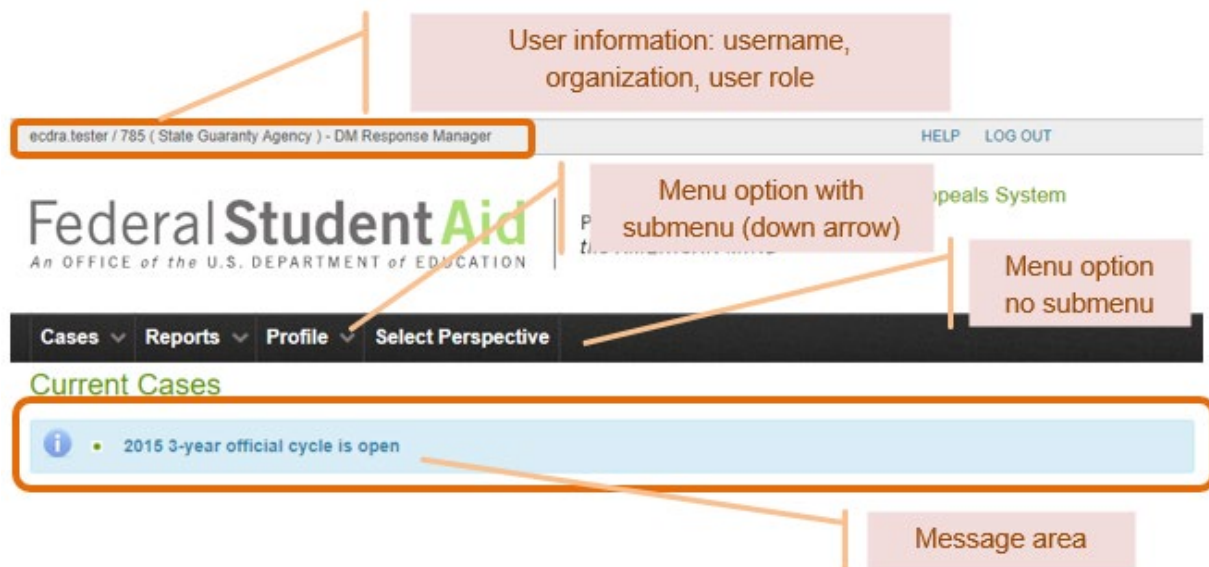


Figure 1 Always available information

There are elements of the user interface that are consistent throughout the site and with all the users. At the top left corner is the user information comprised of the username, the organization name, and the user role. At the top right corner are links for help and logging out.

Below the user information is the application banner with the application name all the way to the right. Below the banner is the menu bar. Menu options may have sub-menus, and this is indicated by a down arrow on the right of the option label.

Below the menu bar is the page name. The page in Figure 1 is “Current Cases”. Underneath the page name is an area for displaying messages (informational, error, warning, etc...).

880014:Geographic Center University

Adjustment Information	
Adjustment ID:	703824
Case Type:	3-YR NDA
SSN:	000000026
Name:	Kxxxxxx, Mxxxxxx J.
Number of Loans:	4

School Input	
Basis of Alleged Error:	Incorrect date entered repayment
Last Date of Attendance (LDA) or Less than Half-Time Date (LHD) (MM/DD/YYYY):	
Date Entered Repayment (MM/DD/YYYY):	05/18/2017
Date Defaulted (MM/DD/YYYY):	
Effect on Calculation:	2015 -D

Comments	

Supporting Documents	

Adjustment Actions	

Figure 2 Page section – LSAppeal DM information

A page is divided into several areas and sections for easy navigation. Areas do not have an explicit separator while sections are explicitly separated by a green bar. A gray bar separates sub-sections within a section. The section or sub-section is identified by a label in the separator.

eCDR Appeals  
UDA User Guide

**DM Adjustment Information**

Request Adjustment Id: 1715588

Case Type: 3-YR NDA

SSN: 000000026

Name: Kxxxxxx, Mxxxxxx J.

Number of Loans: 4

**Borrower Loan Information**

IN CURRENT LRDR	INCLUDED IN CASE	LOAN TYPE	BEGIN DATE	END DATE	LOAN GUARANTY DATE	AMOUNT	ORIGINAL SCHOOL	CURRENT SCHOOL	GUARANTY AGENCY	GA ROUTED TO
Yes	Yes	SF	07/14/2008	03/14/2009	06/12/2008	\$3,500.00	009420	880014	555	555
Yes	Yes	SU	07/14/2008	03/14/2009	06/12/2008	\$6,000.00	009420	880014	555	555
Yes	Yes	SU	03/16/2009	05/23/2009	04/24/2009	\$2,333.00	009420	880014	555	555
Yes	Yes	SF	03/16/2009	05/23/2009	04/24/2009	\$1,750.00	009420	880014	555	555

**School Input**

**DM Input**

DM Response : \*

Agree

Last Date of Attendance (LDA) or Less than Half-Time Date (LHD) (MM/DD/YYYY):

Date Entered Repayment (MM/DD/YYYY): \*

05/18/2017

Date Defaulted (MM/DD/YYYY):

Effect on Calculation:

2015 -D

Click to expand sub-section

Figure 3 Collapsed sub-section - school input

Some sub-sections can be expanded or collapsed to give the user control on what information they may want to look at, at certain times. For example, in Figure 3 above, the school-input sub-section allowing the user to look at the borrower information together with the Data Manager input on the adjustment.



Borrower Loan Information										
IN CURRENT LRDR	INCLUDED IN CASE	LOAN TYPE	BEGIN DATE	END DATE	LOAN GUARANTY DATE	AMOUNT	ORIGINAL SCHOOL	CURRENT SCHOOL	GUARANTY AGENCY	GA ROUTED TO
Yes	Yes	SF	07/14/2008	03/14/2009	06/12/2008	\$3,500.00	009420	880014	555	555
Yes	Yes	SU	07/14/2008	03/14/2009	06/12/2008	\$6,000.00	009420	880014	555	555
Yes	Yes	SU	03/16/2009	05/23/2009	04/24/2009	\$2,333.00	009420	880014	555	555
Yes	Yes	SF	03/16/2009	05/23/2009	04/24/2009	\$1,750.00	009420	880014	555	555

School Input

Basis of Alleged Error: Incorrect date entered repayment

Last Date of Attendance (LDA) or Less than Half-Time Date (LHD) (MM/DD/YYYY):

Date Entered Repayment (MM/DD/YYYY): 05/18/2017

Date Defaulted (MM/DD/YYYY):

Effect on Calculation: 2015 -D

Click to collapse sub-section

DM Input

DM Response : \* Agree

Last Date of Attendance (LDA) or Less than Half-Time Date (LHD) (MM/DD/YYYY):

Date Entered Repayment (MM/DD/YYYY) : \* 05/18/2017

Date Defaulted (MM/DD/YYYY):

Effect on Calculation: 2015 -D

Figure 4 Expanded sub-section - school input

In Figure 4 above, the school input sub-section has been expanded to allow the user to compare the school input with the DM input. Notice that the borrower information has been pushed out of view. The “+” and “-” icons on the right corner of the sub-section headers will, respectively, expand or collapse the sub-section.

## Profiles

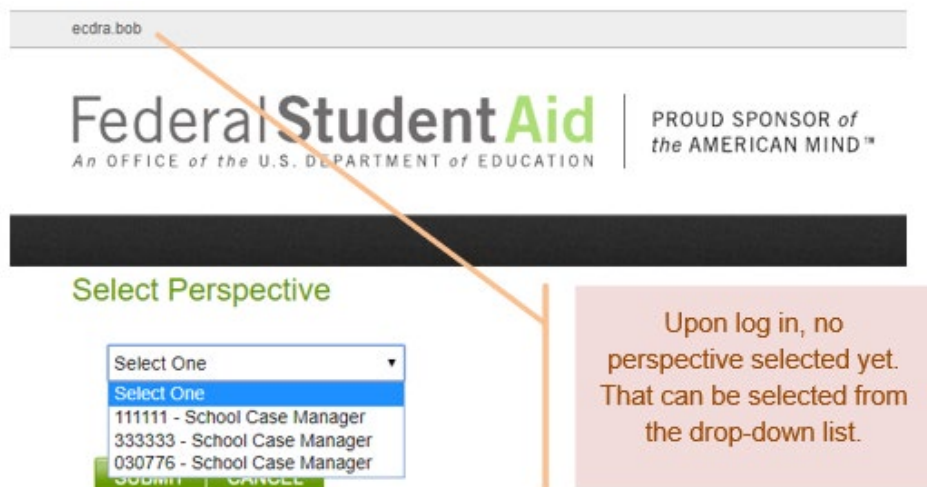
Your profile consists of your username, your organization, your user role, and your contact information. The first three pieces of information can be found on the top left corner of the page. The contact information includes your organization information. The organization information is different for each type and will be discussed in more detail in each organization type’s section.

## Perspectives

A perspective refers to how the user accesses the eCDR Appeals system through the point of view of a specific organization and is defined by the organization, and the user role. This information is displayed at the top left of the page.

## eCDR Appeals UDA User Guide

If you are affiliated with multiple organizations that use eCDR Appeals, your account may have access to different Perspectives in eCDR Appeals. For example, if you are a service provider for school A and school B, you may choose the perspective for school A in which case you will work exclusively with records for school A, or you can choose the perspective for school B in which case you will work exclusively with records for school B. This is to avoid mixing up records between the two organizations. You may switch perspective at any time.



*Figure 5 Selecting a perspective immediately after logging in*

If your account has multiple Perspectives, then you will see the Perspective selection page upon login. You must choose a Perspective to use the eCDR Appeals system, and you may only be in one Perspective at a time. However, you may switch to another Perspective at any time by accessing the “Select Perspective” menu item at the top of the page.

## Menus

You can use the menus to access other functions of the eCDR Appeals system. The functions are usually different for each type of organization and so the menus will also be different. Refer to the menus section for each organization type for a more detailed description.

## Tables

eCDR Appeals  
UDA User Guide

Cases for current cycles							
<div>Showing 10 records (1 - 10 of 15)</div> <div>1 2</div>							
CASE ID	CASE TYPE	COHORT YEAR	OPEID	SCHOOL NAME	STATUS	STATUS DATE	ASSIGNED TO
<a href="#">303565</a>	3-YR IDC	2015	880012	Geographic Center University 13	Caseworker review	12/03/2018	fsa.caseworker ASSIGN
<a href="#">303561</a>	3-YR IDC	2015	111111	UNIVERSITY OF IO	Closed	11/15/2018	
<a href="#">303573</a>	3-YR IDC	2015	880024	Geographic Center University 25	Perfected/Available for FSA review	11/19/2018	Not assigned ASSIGN
<a href="#">303572</a>	3-YR IDC	2015	880023	Geographic Center University 24	Closed	11/05/2018	
<a href="#">303560</a>	3-YR IDC	2015	999989	Martian Rover Institute of Technology	Closed	11/02/2018	
<a href="#">303563</a>	3-YR IDC	2015	880015	Geographic Center University 16	Closed	11/15/2018	
<a href="#">303562</a>	3-YR IDC	2015	880010	Geographic Center University 11	Data Manager review	12/18/2018	
<a href="#">303571</a>	3-YR IDC	2015	880020	Geographic Center University 21	Closed	01/03/2019	
<a href="#">303564</a>	3-YR IDC	2015	880013	Geographic Center University 14	Caseworker review	12/14/2018	fsa.caseworker ASSIGN
<a href="#">303566</a>	3-YR UDA	2015	111111	UNIVERSITY OF IO	Closed	11/23/2018	
<div>Showing 10 records (1 - 10 of 15)</div> <div>1 2</div>							

Figure 6 Table, current cases

The application uses tables to organize data, for lists, reports, or other purposes. Tables entries will usually be sortable and filterable. Some tables may also have the option to select the number of rows that can be displayed at once.

# eCDR Appeals UDA User Guide

Cases for current cycles							
							RESET FILTERS
Showing 10 records (1 - 4 of 4)							
CASE ID	CASE TYPE	COHORT YEAR	OPEID	SCHOOL NAME	STATUS	STATUS DATE	ASSIGNED TO
30357							
<a href="#">303573</a>	3-YR IDC	2015	880024	Geographic Center University 25	Perfected/Available for FSA review	11/19/2018	Not assigned ASSIGN
<a href="#">303572</a>	3-YR IDC	2015	880023	Geographic Center University 24	Closed	11/05/2018	
<a href="#">303571</a>	3-YR IDC	2015	880020	Geographic Center University 21	Closed	01/03/2019	
<a href="#">303570</a>	3-YR NDA	2015	880020	Geographic Center University 21	Awaiting LRDR	12/14/2018	
Showing 10 records (1 - 4 of 4)							

Figure 7 Current cases filtered by case ID

The table entries can be sorted and filtered. Columns that can be filtered will have a text field in the heading. Filtering will be applied as soon as you start typing in the field. For most of the columns, the filter value will be applied to the start of the column entry. For example, in the table above, typing in “30357” in the case ID text field will show all the case IDs that start with “30357”, e.g. 303570, 303571, 303572, 303573.

Cases for current cycles							
							RESET FILTERS
Showing 10 records (1 - 5 of 5)							
CASE ID	CASE TYPE	COHORT YEAR	OPEID	SCHOOL NAME	STATUS	STATUS DATE	ASSIGNED TO
	3-YR NDA						
<a href="#">303567</a>	3-YR NDA	2015	111111	UNIVERSITY OF IO	Caseworker decision review	11/23/2018	fsa.caseworker ASSIGN
<a href="#">303569</a>	3-YR NDA	2015	880015	Geographic Center University 16	Closed	12/07/2018	
<a href="#">303570</a>	3-YR NDA	2015	880020	Geographic Center University 21	Awaiting LRDR	12/14/2018	
<a href="#">303559</a>	3-YR NDA	2015	880010	Geographic Center University 11	Awaiting LRDR	02/05/2018	
<a href="#">303568</a>	3-YR NDA	2015	880012	Geographic Center University 13	Data Manager review	11/28/2018	
Showing 10 records (1 - 5 of 5)							

Figure 8 Current cases filtered by case type

Some columns have drop-down lists. The drop-down lists only values that are available from the table. For example, the case type column has a drop-down list. If there are only NDA case types listed in the table, only NDA will be available from the drop down. If there are IDC and

NDA cases listed in the table, then the drop-down will have both IDC and NDA. Only one value can be selected. Selecting, for example, NDA, shows only the NDA cases.

Cases for current cycles

RESET FILTERS

Showing

10

records

(1 - 1 of 1)

1

CASE ID	CASE TYPE	COHORT YEAR	OPEID	SCHOOL NAME	STATUS	STATUS DATE	ASSIGNED TO
303560	3-YR IDC	2015	999989	Martian Rover Institute of Technology	Closed	11/02/2018	

Showing

10

records

(1 - 1 of 1)

1

Figure 9 Current cases filtered by school name

Some columns will try to find the term entered in the text field in any location in the text value in the column. In the example above, the filter term is “tech” and the table shows all the cases where “tech” appears in the school’s name. In this case, only one school with “tech” in its name has submitted a case.

Cases for current cycles							
Showing 10 records (1 - 4 of 4)							
CASE ID	CASE TYPE	COHORT YEAR	OPEID	SCHOOL NAME	STATUS	STATUS DATE	ASSIGNED TO
30356				university	Closed		
<a href="#">303561</a>	3-YR IDC	2015	11111	UNIVERSITY OF IO	Closed	11/15/2018	
<a href="#">303563</a>	3-YR IDC	2015	880015	Geographic Center University 16	Closed	11/15/2018	
<a href="#">303566</a>	3-YR UDA	2015	11111	UNIVERSITY OF IO	Closed	11/23/2018	
<a href="#">303569</a>	3-YR NDA	2015	880015	Geographic Center University 16	Closed	12/07/2018	

Figure 10 Current cases filtered with multiple criteria

Filter terms can be combined. In the example above, the table lists all cases that start with “30356”, were submitted by a school with “university” in its name and has a status of “Closed”. The filters can be removed by clearing the fields in each column or by clicking the **RESET FILTERS** button. Clicking **RESET FILTERS** clears out all the fields at once.

eCDR Appeals  
UDA User Guide

Cases for current cycles							
<div>Showing 10 records (1 - 10 of 15)</div> <div>1 2</div>							
CASE ID ▲	CASE TYPE ▼	COHORT YEAR	OPEID ▼	SCHOOL NAME ▼	STATUS ▼	STATUS DATE	ASSIGNED TO ▼
<a href="#">303559</a>	3-YR NDA	2015	880010	Geographic Center University 11	Awaiting LRDR	02/05/2018	
<a href="#">303560</a>	3-YR IDC	2015	999989	Martian Rover Institute of Technology	Closed	11/02/2018	
<a href="#">303561</a>	3-YR IDC	2015	111111	UNIVERSITY OF IO	Closed	11/15/2018	
<a href="#">303562</a>	3-YR IDC	2015	880010	Geographic Center University 11	Data Manager review	12/18/2018	
<a href="#">303563</a>	3-YR IDC	2015	880015	Geographic Center University 16	Closed	11/15/2018	
<a href="#">303564</a>	3-YR IDC	2015	880013	Geographic Center University 14	Caseworker review	12/14/2018	<div>fsa.caseworker ▼</div> <div>ASSIGN</div>
<a href="#">303565</a>	3-YR IDC	2015	880012	Geographic Center University 13	Caseworker review	12/03/2018	<div>fsa.caseworker ▼</div> <div>ASSIGN</div>
<a href="#">303566</a>	3-YR UDA	2015	111111	UNIVERSITY OF IO	Closed	11/23/2018	
<a href="#">303567</a>	3-YR NDA	2015	111111	UNIVERSITY OF IO	Caseworker decision review	11/23/2018	<div>fsa.caseworker ▼</div> <div>ASSIGN</div>
<a href="#">303568</a>	3-YR NDA	2015	880012	Geographic Center University 13	Data Manager review	11/28/2018	
<div>Showing 10 records (1 - 10 of 15)</div> <div>1 2</div>							

Figure 11 Cases sorted by case ID

Table entries can also be sorted based on values in certain columns. Columns which are sortable will have up-down arrows in the heading. Clicking on the arrows the first time will sort the column in ascending order. Subsequent clicks will invert the sort.

eCDR Appeals  
UDA User Guide

Cases for current cycles							
Showing 10 records (1 - 10 of 10) 1							
CASE ID	CASE TYPE	COHORT YEAR	OPEID	SCHOOL NAME	STATUS	STATUS DATE	ASSIGNED TO
30356							
<a href="#">303567</a>	3-YR NDA	2015	111111	UNIVERSITY OF IO	Caseworker decision review	11/23/2018	fsa.caseworker ASSIGN
<a href="#">303564</a>	3-YR IDC	2015	880013	Geographic Center University 14	Caseworker review	12/14/2018	fsa.caseworker ASSIGN
<a href="#">303565</a>	3-YR IDC	2015	880012	Geographic Center University 13	Caseworker review	12/03/2018	fsa.caseworker ASSIGN
<a href="#">303561</a>	3-YR IDC	2015	111111	UNIVERSITY OF IO	Closed	11/15/2018	
<a href="#">303566</a>	3-YR UDA	2015	111111	UNIVERSITY OF IO	Closed	11/23/2018	
<a href="#">303560</a>	3-YR IDC	2015	999989	Martian Rover Institute of Technology	Closed	11/02/2018	
<a href="#">303563</a>	3-YR IDC	2015	880015	Geographic Center University 16	Closed	11/15/2018	
<a href="#">303569</a>	3-YR NDA	2015	880015	Geographic Center University 16	Closed	12/07/2018	
<a href="#">303568</a>	3-YR NDA	2015	880012	Geographic Center University 13	Data Manager review	11/28/2018	
<a href="#">303562</a>	3-YR IDC	2015	880010	Geographic Center University 11	Data Manager review	12/18/2018	
Showing 10 records (1 - 10 of 10) 1							

Figure 12 Cases sorted by status

Tables can have both filters and sorting applied together. However, tables can only be sorted on one column at a time. Sorting is also cleared when the Reset Filters button is clicked.



## eCDR Appeals UDA User Guide

Cases for current cycles							
<div> <div>Showing</div> <div>25</div> <div>records</div> <div>(1 - 15 of 15)</div> <div>1</div> </div> <div>RESET FILTERS</div>							
CASE ID	CASE TYPE	COHORT YEAR	OPEID	SCHOOL NAME	STATUS	STATUS DATE	ASSIGNED TO
<a href="#">303565</a>	3-YR IDC	2015	880012	Geographic Center University 13	Caseworker review	12/03/2018	<div>fsa_caseworker</div> <div>ASSIGN</div>
<a href="#">303561</a>	3-YR IDC	2015	111111	UNIVERSITY OF IO	Closed	11/15/2018	
<a href="#">303573</a>	3-YR IDC	2015	880024	Geographic Center University 25	Perfectd/Available for FSA review	11/19/2018	<div>Not assigned</div> <div>ASSIGN</div>
<a href="#">303572</a>	3-YR IDC	2015	880023	Geographic Center University 24	Closed	11/05/2018	
<a href="#">303560</a>	3-YR IDC	2015	999989	Martian Rover Institute of Technology	Closed	11/02/2018	
<a href="#">303563</a>	3-YR IDC	2015	880015	Geographic Center University 16	Closed	11/15/2018	
<a href="#">303562</a>	3-YR IDC	2015	880010	Geographic Center University 11	Data Manager review	12/18/2018	
<a href="#">303571</a>	3-YR IDC	2015	880020	Geographic Center University 21	Closed	01/03/2019	
<a href="#">303564</a>	3-YR IDC	2015	880013	Geographic Center University 14	Caseworker review	12/14/2018	<div>fsa_caseworker</div> <div>ASSIGN</div>
<a href="#">303566</a>	3-YR UDA	2015	111111	UNIVERSITY OF IO	Closed	11/23/2018	
<a href="#">303567</a>	3-YR NDA	2015	111111	UNIVERSITY OF IO	Caseworker decision review	11/23/2018	<div>fsa_caseworker</div> <div>ASSIGN</div>
<a href="#">303569</a>	3-YR NDA	2015	880015	Geographic Center	Closed	12/07/2018	

Figure 13 Current cases table set to display 25 records per page

With some tables, the number of rows displayed can be changed. For the Current Cases table, the default is 10 rows at a time. This can be changed to 25, 50, or 100 rows at a time.

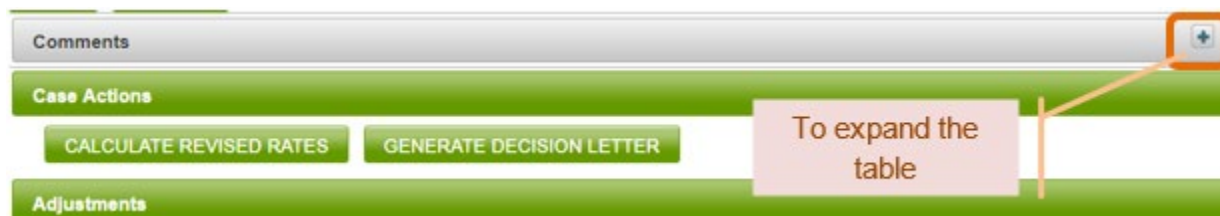


Figure 14 Comments history table, collapsed

Some tables can also be collapsed. This is done for tables that contain data which does not have to be viewed regularly but which is useful enough that it needs to be easily accessible. The table can be expanded or collapsed by clicking on the “+” or “-” icon on the top right corner of the table.



Comments			
STATUS	COMMENT	TIMESTAMP	USER
Case manager decision review	Assigned fsa casemanager to case for review	02/02/2018 1902:01	ecdra tester
Case manager decision review	Assigned fsa caseworker to cas	18:01:04	ecdra tester
Case manager decision review	Case manager decision review	18:53:58	ecdra tester
Available for case manager decision review	Assigned ecdra tester to case fc	18:53:57	ecdra tester
Available for case manager decision review	Available for case manager decision review	02/02/2018 1848:28	fsa.casemanager
Caseworker decision review	Caseworker decision review	02/02/2018 1829:15	fsa.casemanager
Available for caseworker decision review	Assigned fsa casemanager to case for review	02/02/2018 1829:15	fsa.casemanager
Available for caseworker decision review	Available for caseworker decision review	02/02/2018 1826:19	fsa.casemanager
Case manager review	Case manager review	02/02/2018 1811:32	fsa.casemanager
Available for case manager review	Assigned fsa casemanager to case for review	02/02/2018 1811:32	fsa.casemanager
Available for case manager review	Available for case manager review	02/02/2018 1802:46	fsa.caseworker
Caseworker review	Caseworker review	02/02/2018 1755:31	fsa.caseworker
Perfected/Available for FSA review	Assigned fsa caseworker to case for review	02/02/2018 1755:31	fsa.caseworker
Perfected/Available for FSA review	Perfected/Available for FSA review	02/02/2018 1728:11	88001400.user

Figure 15 Comments history table, expanded

## General information

### Email notifications

The eCDR Appeals application is designed to send out automatic email notifications to affected parties whenever updates to LSA cases occur. These email notifications inform the appropriate individuals and organizations that their attention is needed and that they may be required to take an action in the eCDR Appeals system. Email notifications are provided only for your convenience; they should not be relied upon to know when an action is required on your part. Email notifications may be delayed or not delivered for a variety of reasons, including being blocked because of an organization's email filter configuration. It is your responsibility to log in to the eCDR Appeals system on a regular basis throughout the cohort cycle to check the status of your cases, and to ensure that the contact information in your profile is up to date.

### File attachments

During the LSA Workflow process, you may be required to attach supporting documentation to the case. The eCDR Appeals system allows you to attach any type of file; however, we recommend choosing a common file format to ensure that others will be able to open and view the file.

Common file types include:

- Portable Document Format (PDF)
- MS Excel (XLS or XLSX)
- MS Word (DOC or DOCX)
- Rich Text Format (RTF)
- Plain text (TXT)
- Pictures (JPG/PNG/GIF)

## eCDR Appeals UDA User Guide

You are by no means required to use one of the specific file types listed here. This list only suggests some of the most commonly used file formats. Thus, if you use the above file types, other users in the eCDR Appeals system are more likely to have the appropriate software to view your files.

### *Deadlines and calculation of days*

Deadline for submission of the LSA is counted from the official start date of the official cycle.

The deadline for responding to a case is counted from when the case goes into Data Manager (DM) review. The Data Manager may manually put the case into review. If the DM does not, the case will automatically go into DM review on the next business day after the case is submitted.

The deadline to respond to data requests, ex. clarification, additional data request from FSA, etc., is counted from the date the request was made.

## School

The application has multiple pages for different functions, but they all have similar elements. Please refer to the All Users [NAVIGATION](#) section for descriptions of these common elements.

## Navigation

### *School roles*

Your account will be assigned one of two possible eCDR Appeals roles:

- **Case Preparer:** May initiate and prepare a new case.
- **Case Manager:** Has the same abilities as a Case Preparer, plus the ability to submit a case.

## Profiles



Figure 16 Profile menu option, school user

Cases ▾ Reports ▾ Profile ▾ Select Perspective

## Edit profile

999989: Martian Rover Institute of Technology



- Please verify and update the following information.
- Fields marked with (\*) are required

### Organization Information

Organization Name: *	<input type="text" value="Martian Rover Institute of Technology"/>
Address: *	<input type="text" value="123 My Way Street"/>
City: *	<input type="text" value="Do Not Know"/>
State:	<input type="text" value="TT - Trust Territories of the Pacific"/>
Zip:	<input type="text" value="20202"/>
Country:	<input type="text"/>
School Type:	FOREIGN PRIVATE
School Region:	NEW YORK/BOSTON
Organization Email: *	<input type="text" value="marvin@mrit.edu"/>
Alternate Email:	<input type="text"/>
Phone Number: *	<input type="text" value="202-555-5555"/>
Alternate Phone:	<input type="text"/>

Figure 17 Organization contact information

User Contact Information

Last Name: \*

Martin

First Name: \*

John

Email\*: \*

john.martin@mrit.edu

Phone: \*

202-555-5555

SAVE

CANCEL

Other User Contacts

NAME	EMAIL	PHONE
<a href="#">Test_Test</a>	ed.test@ed.test	202-323-2343
<a href="#">Test_Test</a>	ed.test@ed.test	202-323-2343
<a href="#">New Martian_Contact</a>	mit@ed.test	202-300-3233

NEW CONTACT

Figure 18 User contact information

If you are the first user from your school to log in to eCDR Appeals, you will need to complete your organizational and individual profiles, which consist of contact information. Figure 17 shows the organization contact information fields. The required fields for the school should already be filled out. Your contact information will not be. Figure 18 shows the user contact information fields. This is where you enter your contact information. The email address will be added to the notification list so you will receive any email notifications sent by the system. Ensure that all the information is provided and is up to date, then click the **SAVE** button.

## Perspectives

ecdra.bob / 111111 ( UNIVERSITY OF IO ) - School Case Manager

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Cases ▾

Reports ▾

Profile ▾

Select Perspective

Select Perspective

Select One ▾

Select One

111111 - School Case Manager

333333 - School Case Manager

030776 - School Case Manager

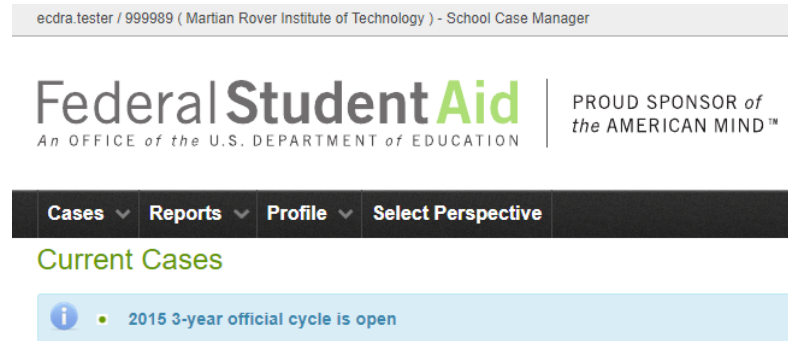
SUBMIT

CANCEL

Figure 19 Perspective selection for multiple schools

You may switch to another Perspective at any time by clicking on the **PERSPECTIVE** option in the main menu and selecting a different school from the drop-down list.

## Menus



*Figure 20 School user menu bar*

The menu options shown are those available for school users. The down arrow to the right of the option name indicates that there is an associated sub-menu. Selecting a menu, or sub-menu, option will open a page. The pages will be described in separate sections in this document.

Menu and sub-menu options for school users:

- Case (see CASES FOR SCHOOLS)
  - Current cases (see CURRENT CASES (SCHOOL VIEW))
  - Past cases (see PAST CASES (SCHOOL VIEW))
- Reports (see REPORTS (FOR SCHOOLS))
  - Current status (see CURRENT STATUS)
  - CDR Changes (see CDR CHANGES)
- Profile (see PROFILES)
- Select Perspective (see PERSPECTIVES) – only available if user has multiple organizations

## Documents

Much of the specific information that comprises the LSA are contained in documents that are created outside eCDR Appeals. Information that the school will provide to FSA will often be referred to as the school spreadsheet.

### School spreadsheet

The “school spreadsheet” contains the school’s listing of borrowers that they are alleging were improperly serviced.

Please note the following about the finalized school spreadsheet and eCDR Appeals:

- The School Spreadsheet must be a table listing with columns consistent with that described in the CDR Guide.
- You must provide a single document for each cohort year. For example, if you are appealing cohort year 2015 and cohort year 2014, you would provide a document for 2015 and a separate document for 2014.
- If you would like to keep different Data Managers on different listings, you can do so by including several tabs (pages) within a single workbook.
- Federal Student aid prefers receiving the School Spreadsheet as a workbook / spreadsheet in its native form (e.g., MS Excel, Apache OpenOffice Calc) rather than as a PDF file.
  - This will help OPD in its preparation of the Enclosures to the Decision Letter. (Note: Enclosures to the Decision Letter list FSA's decision for each and every borrower you allege was improperly serviced for CDR purposes and includes FSA's conclusions about the loan servicing dates and actions pertinent to that borrower.)
  - If you do not have a spreadsheet software program available to you, you could also submit a word document where borrowers are presented in a table (e.g., MS Word, Apache OpenOffice Writer).
  - You should mark the finalized document "Read Only" or "Mark as Final".

### *Creating the spreadsheet*

How to create the School Spreadsheet is entirely up to the School. There are three possible starting points that might reduce the amount of data entry or editing required.

### *Use template*

#### **Loan Servicing Appeal Details**



*Figure 21 Loan Servicing Appeal Templates link*

As a first option, you can obtain a School Spreadsheet from the OPD website by visiting the following link. <https://ifap.ed.gov/DefaultManagement/guide/TemplatesSpreadshts.html>. This page lists several spreadsheets for schools. The one you should use is Loan Servicing Appeal (XLS), fourth from the bottom in the "For Schools" column. There is also a link to this site titled "Loan Servicing Appeal Templates" conveniently located on every LSAppeal Details page of LSA cases, just below the **BACK TO CASE** button, and above the Appeal Processing Actions section of the page, as shown on Figure 21.

## eCDR Appeals UDA User Guide

This template offers the approved format for the spreadsheet. All data must be manually entered, including borrowers' names and social security numbers, and the Data Manager's code.

### Use export borrower list

Borrower Servicing Records		
		
BORROWER	NUMBER OF LOANS	DM
000-00-0088 <a href="#">Oxxxxxx L. Txxxxxx</a>	1	555
000-00-0141 <a href="#">Rxxxxxx C. Exxxxxx</a>	1	555
000-00-0153 <a href="#">Mxxxxxx K. Kxxxxxx</a>	1	555
000-00-0194 <a href="#">Sxxxxxx L. Axxxxxx</a>	1	555

Export Borrowers List as Excel

Figure 22 Export borrowers list button

As a second option, you can export the listing of borrowers for whom the Data Manager was required to provide servicing records. You must do so individually for each Data Manager (and in each year if a multiyear case).

The advantage of this approach is that the spreadsheet is populated for you with the borrower's name and social security number, number of defaulted loans and Data Manager code.

The disadvantage is that you must remove all rows (borrowers) that are not alleged “improperly serviced”. Since this must be done manually it may be more time consuming than using the first method proposed. In this approach, you must also eventually consolidate all DM listings into a single workbook.

### Use DM spreadsheet

Servicing records and documents from Data Manager 785	
FILE NAME	FILE DESCRIPTION
<a href="#">borrowerlist_785_2015.xls</a>	Servicing information
<a href="#">Still more loans stuff.xlsx</a>	Clarification Request Document: - Borrower stuff

Servicing records and documents from Data Manager 888	
FILE NAME	FILE DESCRIPTION
No documents for Data Manager 888	

Figure 23 DM Spreadsheet

As a third option, if the Data Manager provided a “DM Spreadsheet” along with its servicing records or as response to a clarification request, that document can prove an excellent starting point since the Data Manager will have included in this document some servicing information for at least some borrowers. Simply select that document and save it to your local computer for



editing. You will need to consolidate all DM listing into a single workbook as for the second option. It is not likely that all Data Managers will provide a “DM Spreadsheet” but this may be a useful option for some.

### Attaching documents

FILE NAME	FILE DESCRIPTION	ACTION
No documents attached		

Figure 24 School spreadsheet attach file

Click the **ATTACH FILE** button to open the Attachment Upload page.

### Ecdra Document Upload

Select File: C:\Users\Fernando.Felixa\Browse... Browse...

File Description: Borrower servicing info 2015 X

SAVE CANCEL

Figure 25 Upload page for document

Select a file by browsing your local computer for the finalized School Spreadsheet you prepared for this cohort year. Enter a brief file description. Click **SAVE** to upload the file.

### Removing documents

FILE NAME	FILE DESCRIPTION	ACTION
<u>borrowerlist_880119_2015.xls</u>	Borrower servicing info 2015	REMOVE

Figure 26 Attached document with remove button

## Cases for schools

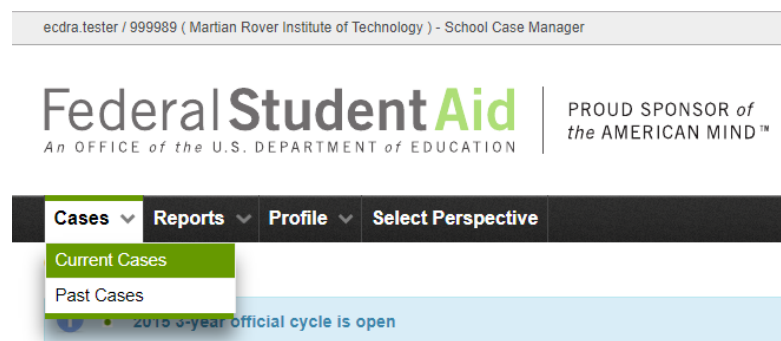


Figure 27 School user cases menu options

### Current cases (school view)

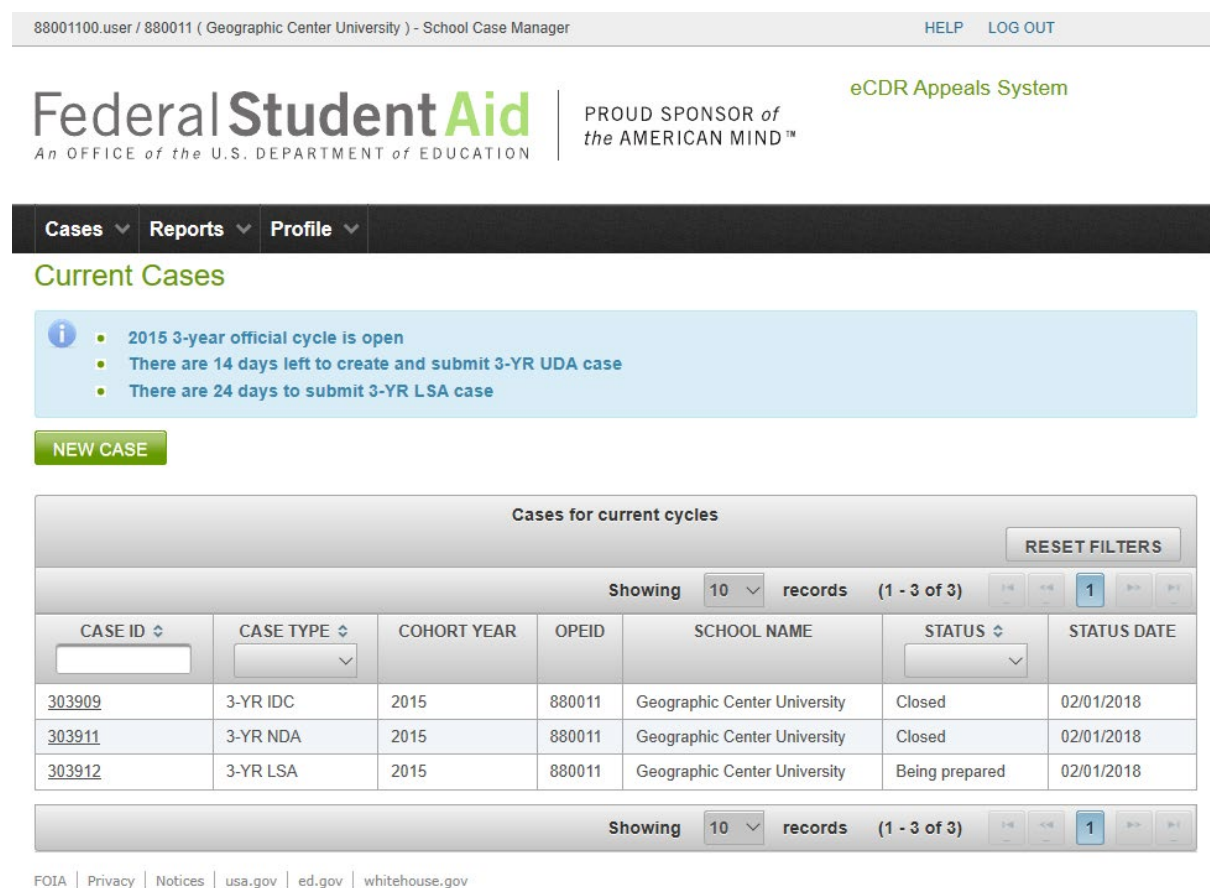


Figure 28 School user current cases page

The Current Cases page lists all current cases that were created by the school, along with their status information. The Current Cases page is also the page from which you will initiate a new case.

## Past cases (school view)

ecdra.test@999989 (Marian Rover Institute of Technology) - School Case Manager [HELP](#) [LOG OUT](#)

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eCDR Appeals System

[Cases](#) ▾ [Reports](#) ▾ [Profile](#) ▾ [Select Perspective](#)

Past Cases

Cases for past cycles

Showing 10 records (1 - 2 of 2) [1](#) [2](#) [3](#) [4](#) [5](#) [6](#) [7](#) [8](#) [9](#) [10](#) [11](#) [12](#) [13](#) [14](#) [15](#) [16](#) [17](#) [18](#) [19](#) [20](#) [21](#) [22](#) [23](#) [24](#) [25](#) [26](#) [27](#) [28](#) [29](#) [30](#) [31](#) [32](#) [33](#) [34](#) [35](#) [36](#) [37](#) [38](#) [39](#) [40](#) [41](#) [42](#) [43](#) [44](#) [45](#) [46](#) [47](#) [48](#) [49](#) [50](#) [51](#) [52](#) [53](#) [54](#) [55](#) [56](#) [57](#) [58](#) [59](#) [60](#) [61](#) [62](#) [63](#) [64](#) [65](#) [66](#) [67](#) [68](#) [69](#) [70](#) [71](#) [72](#) [73](#) [74](#) [75](#) [76](#) [77](#) [78](#) [79](#) [80](#) [81](#) [82](#) [83](#) [84](#) [85](#) [86](#) [87](#) [88](#) [89](#) [90](#) [91](#) [92](#) [93](#) [94](#) [95](#) [96](#) [97](#) [98](#) [99](#) [100](#) [101](#) [102](#) [103](#) [104](#) [105](#) [106](#) [107](#) [108](#) [109](#) [110](#) [111](#) [112](#) [113](#) [114](#) [115](#) [116](#) [117](#) [118](#) [119](#) 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## Case (school view)

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### Case Details

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**Workflow Actions**  
Case workflow actions. [WITHDRAW CASE](#)

**Case Information**  
Case ID: 303928  
Cohort Year: 2015  
Case Type: 3-YR LSA  
Status: Servicing records requested  
Status Date: 01/23/2018

**Comments** [+](#)

**Case Actions**  
No available case actions

Figure 30 Case details page, school user

The OPEID and name of the school that “owns” the case is displayed below the common message area. For a school user, this is the same as the information at the top left corner of the page. Its purpose here is for convenience as it is much easier to see close to the other case information and makes it clear who the case belongs to. All the way to the right is at least one link to a printable version of the case which includes all the adjustment, DM adjustment, and loan information. Links for other printable documents may become available based on the status of the case. Just below all these is the Case Workflow Actions section, separated from the previously described elements by a green bar. This section is described in more below in CASE WORKFLOW ACTIONS.

Below the workflow actions section is the Case Information section.

### Case information

The basic case information consists of the case ID, the cohort year, the case type, the status and the status date (see Figure 24). The case page also has a section for the loan servicing records. A school may appeal the current cohort year and the two previous years and there are tables for each year in the section. For the school to appeal the default rate for those cohort

years, they must be under sanction in that cohort year. If they are eligible, the table for that year will list the Data Managers (e.g. guaranty agencies, loan servicers, etc...) from whom servicing records may be requested. The table will also show the number of borrowers and loans in default for that cohort year.

Loan Servicing Records

☒ Cohort Year 2015 Data Managers: 4 Defaulted Borrowers: 639 Defaulted Loans: 1802

Showing 10 records (1 - 4 of 4)

SELECTED	DM	YEAR	BORROWERS	LOANS	BORROWER SAMPLE SIZE	SAMPLED LOANS	SAMPLING METHOD	STATUS
<input checked="" type="checkbox"/>	555	2015	115	280				
<input checked="" type="checkbox"/>	583	2015	125	304				
<input checked="" type="checkbox"/>	777	2015	212	726				
<input checked="" type="checkbox"/>	785	2015	187	492				

Showing 10 records (1 - 4 of 4)

☒ Cohort Year 2014 Data Managers: 4 Defaulted Borrowers: 639 Defaulted Loans: 1802

Showing 10 records (1 - 4 of 4)

SELECTED	DM	YEAR	BORROWERS	LOANS	BORROWER SAMPLE SIZE	SAMPLED LOANS	SAMPLING METHOD	STATUS
<input checked="" type="checkbox"/>	555	2014	115	280				
<input checked="" type="checkbox"/>	583	2014	125	304				
<input checked="" type="checkbox"/>	777	2014	212	726				
<input checked="" type="checkbox"/>	785	2014	187	492				

Showing 10 records (1 - 4 of 4)

☒ Cohort Year 2013 Data Managers: 0 Defaulted Borrowers: 0 Defaulted Loans: 0

Showing 10 records (0 - 0 of 0)

No records found

Showing 10 records (0 - 0 of 0)

SAVE CANCEL

Eligible for LSA.

Eligible for LSA.

Not eligible for LSA. School might not have any defaulted loans or was not under sanction this cohort year

Figure 31 LSA by cohort years

## Case workflow actions

Case workflow actions typically change the status of the case and become available as appropriate for the case and workflow step. For example, while the LSA is being prepared, the Certify action is available. When the certify action is performed, the case status changes to "Certified" and the Submit action becomes available.

The possible workflow actions for a school user are listed below:

Request Servicing Records (see REQUEST SERVICING RECORDS)

Certify (see CERTIFYING THE LSA FOR )

Submit (see SUBMITTING THE LSA TO FSA)

Decertify (see DECERTIFYING THE LSA BEFORE SUBMITTING TO FSA)

Withdraw (see WITHDRAWING THE CASE)

## Case actions

There are no LSA case actions for school users.

## Comments

Comment input text field

Comments history

STATUS	COMMENT	TIME STAMP	USER
Servicing records being prepared	Servicing records being prepared	01/24/2018 1448:37	ecdra.testter
Awaiting LRDR	Due date to submit case to DM is updated to 02/08/2018	01/24/2018 1448:36	System User
Awaiting LRDR	Awaiting LRDR	01/24/2018 1438:14	System User
Case created	Due date to submit case to DM will be computed and set.	01/24/2018 1438:13	System User
Case created		01/24/2018 1438:13	88012000.user

*Figure 32 Case comments*

A Comments table displays the history of the case showing statuses, comments, and the time stamp and user when the statuses and comments were recorded. The history is arranged in reverse chronological order, with the most recent status change or comment at the top.

Comments may be generated by the system or entered by a user. When available, you may add comments to your case by typing in the comment text box and clicking **SAVE**. Anyone who has access to the case can see all the comments associated with that case. Once saved, comments cannot be removed. Adding a comment is optional for a user.

## Initiating a new LSA

You will only be able to submit an LSA if your school is under sanction in the current or any of the two previous cohort years. The system uses a sanctioned school list to determine if you are eligible to submit a case. This list needs to be uploaded to the system. You may initiate the LSA before the list or the LRDRs are loaded. The case will go into a waiting status until these files are loaded. Once the files are uploaded, the system will change the status of the case so you can work on it. The system will also automatically extend your deadline to submit the case by the number of days that it was in awaiting status. For example, if it took two days to load the files after you created the case, then your deadline to submit the case will be extended by two days.

### Current Cases



The screenshot shows a light blue information box with a circular icon containing the letter 'i' on the left. To the right of the icon are three bullet points, each preceded by a small green dot. Below the information box is a green rectangular button with the text 'NEW CASE' in white capital letters.

- 2015 3-year official cycle is open
- There are 14 days left to create and submit 3-YR UDA case
- There are 24 days to submit 3-YR LSA case

NEW CASE

*Figure 33 New case button*

From the Current Cases page, click the **NEW CASE** button. The Create Case page will open. Select the LSA case type from the drop-down list. Click **SAVE**.



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### Create Case

i

- The 3-YR UDA case cannot be created (possible reasons: not eligible, submission period past, already created, etc...)
- The 3-YR NDA case cannot be created any more (either submission period past or already created)
- There are 14 days left to create and submit 3-YR LSA case

880014:Geographic Center University

Workflow Actions

No available workflow actions

Case Information

Case Type: 2015 - 3-YR LSA ▾

Comment:

SAVE

CANCEL

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Figure 34 Create case page

A new case will be created. If all the required files, LRDRs and sanctioned list, have been previously loaded, the case will go into “Servicing Records being Prepared status”, otherwise it will go into an awaiting status (“Awaiting Prerequisite Files”, “Awaiting Required Files”, or “Awaiting LRDR”).



## Preparing the servicing records request for the LSA

**Loan Servicing Records**

☒ Cohort Year 2015 Data Managers: 4 Defaulted Borrowers: 639 Defaulted Loans: 1802

SELECTED	DM	YEAR	BORROWERS	LOANS	BORROWER SAMPLE SIZE
<input checked="" type="checkbox"/>	555	2015	115	280	
<input type="checkbox"/>	583	2015	125	304	
<input checked="" type="checkbox"/>	777	2015	212	726	
<input checked="" type="checkbox"/>	785	2015	187	492	

Showing 10 records (1 - 4 of 4)

Eligible for LSA. School looking at appealing this cohort year. Selected Data Managers to request servicing records from

☒ Cohort Year 2014 Data Managers: 4 Defaulted Borrower: 639

SELECTED	DM	YEAR	BORROWERS	LOANS	BORROWER SAMPLE SIZE
<input type="checkbox"/>	555	2014	115	280	
<input type="checkbox"/>	583	2014	125	304	
<input type="checkbox"/>	777	2014	212	726	
<input type="checkbox"/>	785	2014	187	492	

Showing 10 records (1 - 4 of 4)

Eligible for LSA. No Data Managers selected, school will not request servicing records for this cohort year

☒ Cohort Year 2013 Data Managers: 0 Defaulted Borrowers: 0 Defaulted Loans: 0

SELECTED	DM	YEAR	BORROWERS	LOANS	BORROWER SAMPLE SIZE	SA
No records found						

Showing 10 records (0 - 0 of 0)

Cannot request servicing records for this cohort year

SAVE CANCEL

Figure 35 Data Managers to request servicing records from, selected

The Data Managers (DMs) are selected by default in all the eligible years. If there are DMs you do not need servicing records from, click on the checkboxes to remove the checks to deselect them. You can reselect the checkboxes if you decide that you do want to get servicing records from them. Once you have made your selection, or deselection, click the Save button. The case page will reload, and the checkboxes will show your selection. You may change the selection as often as you need to until you request the servicing records.

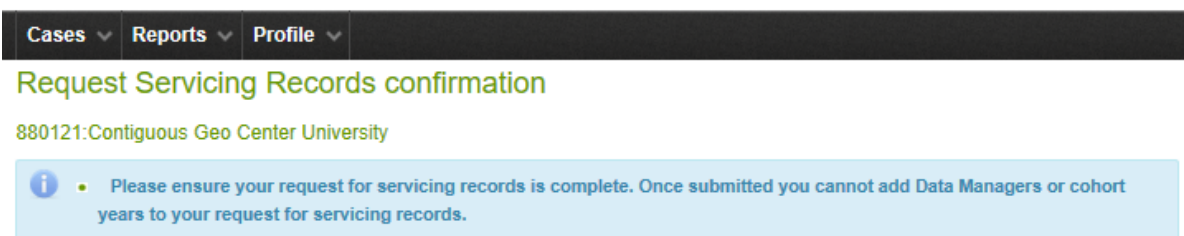
If you do not select any DMs in a cohort year, the check mark for that cohort year will be removed after you click **SAVE**. You can only select Data Managers from an eligible cohort year.

## Request servicing records



Figure 36 Request servicing records workflow action, school user

When you are ready to request the servicing records, click the **REQUEST SERVICING RECORDS** button in the case workflow actions section. A confirmation page will open with a reminder to make sure you have selected all the Data Managers you wish to request servicing records from.



Click OK to request servicing records from Data Managers, click Cancel to return to case details.



Figure 37 Request servicing records confirmation page

Click **OK** to continue with request of servicing records from Data Managers. Click **CANCEL** if you need to make changes to the case before sending records request to the Data Managers.


## Preparing the LSA for submission to FSA

<input checked="" type="checkbox"/> Cohort Year 2015      Data Managers: 3   Defaulted Borrowers: 452   Defaulted Loans: 1310							
Showing 10 records (1 - 3 of 3) 1							
DM	YEAR	BORROWERS	LOANS	BORROWER SAMPLE SIZE	SAMPLED LOANS	SAMPLING METHOD	STATUS
555	2015	125	304	95	233	Simple Random Sampling	Servicing Records Submitted
583	2015	115	280				Servicing Records Requested
785	2015	212	726	138	473	Systematic Sequential Sampling	Servicing Records Requested
Showing 10 records (1 - 3 of 3) 1							

Figure 38 DM responded, provided servicing records

When a Data Manager (DM) responds, you may review the servicing records provided by that DM. You may request clarification from the DM if necessary. When all the Data Managers (DMs) involved in the LSA case have responded to your request for Servicing Records, the Case Status changes to “Being Prepared”.

## Case Details

 • There are 13 days to submit 3-YR LSA case

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**Workflow Actions**

CERTIFYWITHDRAW

**Case Information**

Case ID: 303932  
Cohort Year: 2015  
Case Type: 3-YR LSA  
Status: Being prepared  
Status Date: 01/22/2018

Comment:

SAVECANCEL

Comments

**Case Actions**

No available case actions

*Figure 39 Case details page, being prepared status*

At that point, you have 30 days to submit the LSA to FSA, unless clarifications are still necessary. If you have requested servicing records for more than one cohort year, all the years that you requested records for will be selected, by default, for submission to FSA. If you don't intend to appeal a particular year(s), you may unselect that year(s) and they will not be included in the case when it gets submitted to FSA.

## eCDR Appeals UDA User Guide

☒ Cohort Year 2015
 Data Managers: 3 Defaulted Borrowers: 452 Defaulted Loans: 1310

DM	YEAR	BORROWERS	LOANS	BORROWER SAMPLE SIZE	SAMPLED LOANS	SAMPLING METHOD	STATUS
<a href="#">555</a>	2015	125	304	95	233	Simple Random Sampling	Servicing Records Submitted
<a href="#">583</a>	2015	115	280	89	218	Systematic Sequential Sampling	Servicing Records Submitted
<a href="#">785</a>	2015	212	726	138	473	Systematic Sequential Sampling	Servicing Records Submitted

Showing 10 records (1 - 3 of 3)

☐ Cohort Year 2014
 Data Managers: 3 Defaulted Borrowers: 452 Defaulted Loans: 1310

DM	YEAR	BORROWERS	LOANS	BORROWER SAMPLE SIZE	SAMPLED LOANS	SAMPLING METHOD	STATUS
<a href="#">555</a>	2014	125	304	95	230	Simple Random Sampling	Appeal Withdrawn
<a href="#">583</a>	2014	115	280	89	220	Systematic Sequential Sampling	Servicing Records Submitted
<a href="#">785</a>	2014	212	726	138	476	Systematic Sequential Sampling	Servicing Records Submitted

Showing 10 records (1 - 3 of 3)

Figure 40 One cohort year unselected, will not be appealed

Unselect a cohort year by clicking on the checkbox beside the year to make the check go away. You cannot select individual DMs in the cohort year. If you appeal a year, all the DMs that have provided servicing records will be included in the FSA review. When you have unselected all the years that you do not want to include in the appeal, click the **SAVE** button at the bottom of the Loan Servicing Records section.

You can filter the entries in the Loan Servicing Records section of the case details page so that only the years and the DMs that you wish to have FSA review will be listed (see **SHOW PERFECTED**). This is to make it easier for you, in case your school has records from several DMs, and/or for multiple years, to see which DMs will be included in the appeal. You need to provide a spreadsheet of the servicing records for the DMs for each cohort year you are appealing (see **SCHOOL SPREADSHEET**).

If your school received a representative sample of loan servicing records from any data manager involved in the case, you may choose to submit a perfected case even while you were not able to identify any “improperly serviced” borrowers. In such a situation, you must still upload a file as the system will expect a “School Spreadsheet” to be uploaded for every cohort year in the case. You can simply prepare a file that does not contain any borrower information.

You may add a statement like “No borrowers identified as improperly serviced in cohort year 2015” in the file to make it clear that you did not just forget to include borrower information in the file.

The screenshot shows the 'Attached Documents' section with two tabs: 'Decision Letter Enclosures' and 'Borrower Information Provided by School (School Spreadsheet)'. The 'Borrower Information Provided by School (School Spreadsheet)' tab is active, showing an 'ATTACH FILE' button and a table with columns for 'FILE NAME', 'FILE DESCRIPTION', and 'ACTION'. Below this is a spreadsheet titled 'LSAppeal\_880119\_2013 - Compatibility Mode - Excel'. The spreadsheet has columns A through O, with headers: A (Borrower's SSN), B (Borrower's Name), C (Type of Defaulted Loans), D (Number of Defaulted Loans), E (Payment Made?), F (Date Letter Sent), G (Date Call Attempted), H (Date Pre-Claims Assistance Requested), I (Date Final Demand Letter Sent), J (Address Known?), K (Date of Skip Tracing Activity), L (Illegible Record?), M (Missing Records?), N (Improperly Serviced?), and O (Data Manager Code). Row 1 contains the headers, and row 2 contains the text 'No borrowers identified as improperly serviced' in column A.

Figure 41 School spreadsheet with no borrowers identified

A case that is ready to be submitted to FSA is usually referred to as “Perfected”. This means that you have identified the loans that were improperly serviced and the DMs holding those loans and those DMs, and only those DMs, are selected for submission to FSA.

## Certifying the LSA for FSA

*NOTE: Certifying the LSA is a separate step from submitting the LSA. Both steps must be completed to send the case to the Data Managers for review.*

The screenshot shows the 'Workflow Actions' section with two buttons: 'CERTIFY' and 'WITHDRAW'. The 'CERTIFY' button is highlighted with an orange border. Below this is the 'Case Information' section.

Figure 42 Case certify workflow action, school user

Click **CERTIFY** in the Workflow Actions section. This will load the Case Certification Upload page where you can choose the file that contains the President/CEO’s certification. The certification must be a signed letter from the CEO, President, or owner of your school stating that all the data in the LSA is correct under penalty of perjury.

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## Case Certification Upload

[BACK TO CASE](#)

**i** If possible, please use one of the following file formats for your attached documents.

- Portable Document Format (PDF)
- MS Excel (XLS)
- MS Word (DOC)
- Rich Text Format (RTF)
- Plain text (TXT)
- Pictures (JPG/PNG/GIF)

This is to ensure that everyone reviewing your case can view the documents properly.

Select File:  [Browse...](#)

File Description:

[SAVE](#)

[CANCEL](#)

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*Figure 43 Case certification upload page*

Click the **CHOOSE FILE** (or **BROWSE**, depending on the browser) button to locate the file you wish to upload. Then click **SAVE**. The Current Cases page will load showing the case as Certified.

## Decertifying the LSA before submitting to FSA

**Workflow Actions**

[SUBMIT](#)

[DECERTIFY](#)

[WITHDRAW CASE](#)

**Case Information**

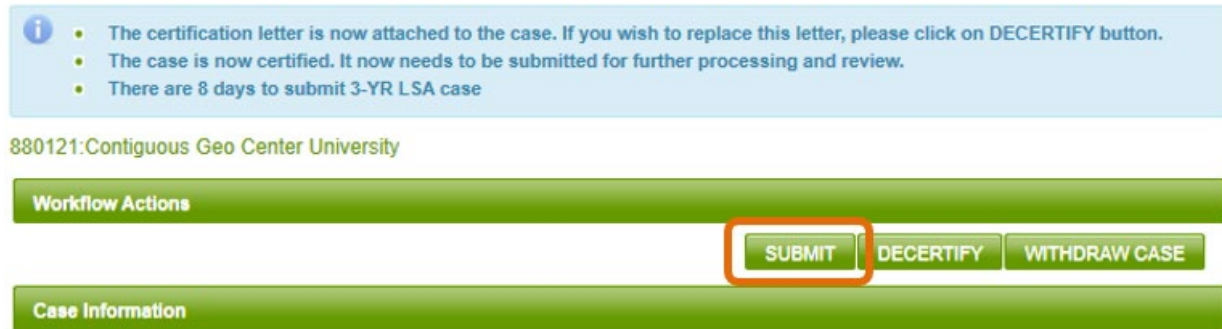
*Figure 44 Case decertify workflow action, school user*

When the case is certified, you cannot make any modifications to it. If you need to make any changes, for example, select another DM, deselect a DM, etc., you will need to decertify the LSA. Open the case and from the Case details page, click the **DECERTIFY** button. The Current Cases page will load and the LSA will be listed with “Being Prepared” status. The certification letter will also have been removed.



## Submitting the LSA to FSA

### Case Details



**i**

- The certification letter is now attached to the case. If you wish to replace this letter, please click on DECERTIFY button.
- The case is now certified. It now needs to be submitted for further processing and review.
- There are 8 days to submit 3-YR LSA case

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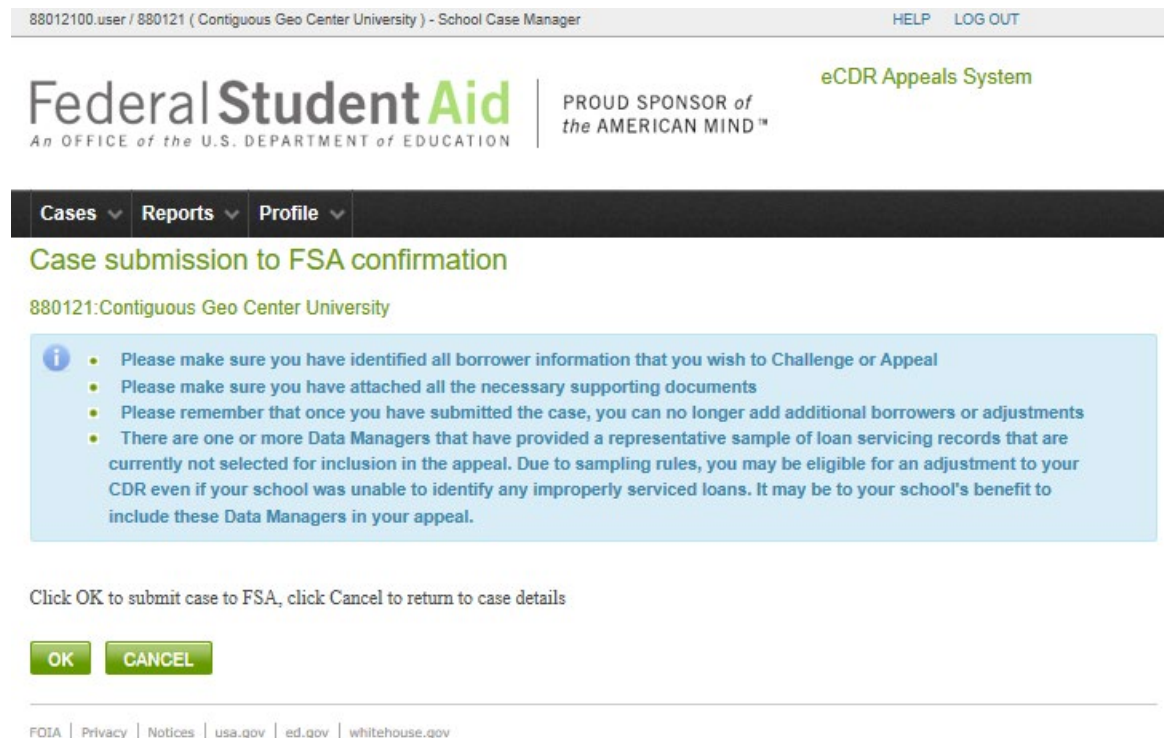
**Workflow Actions**

**SUBMIT** **DECERTIFY** **WITHDRAW CASE**

**Case Information**

Figure 45 Case submit workflow action, school user

From the Case Details page, click **SUBMIT**. A confirmation page will load.



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**Case submission to FSA confirmation**

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**i**

- Please make sure you have identified all borrower information that you wish to Challenge or Appeal
- Please make sure you have attached all the necessary supporting documents
- Please remember that once you have submitted the case, you can no longer add additional borrowers or adjustments
- There are one or more Data Managers that have provided a representative sample of loan servicing records that are currently not selected for inclusion in the appeal. Due to sampling rules, you may be eligible for an adjustment to your CDR even if your school was unable to identify any improperly serviced loans. It may be to your school's benefit to include these Data Managers in your appeal.

Click OK to submit case to FSA, click Cancel to return to case details

**OK** **CANCEL**

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Figure 46 Case submission confirmation page

This page will display reminders of what to check before submitting the case. If you wish to make any further changes before submission, select **CANCEL** to return to the Case Details page, where you can decertify the case and make changes. Otherwise, if no changes are needed, select **OK** to submit the case to FSA.

Once the case is submitted, you will be returned to the Current Cases list which will show the case status as “Perfected/Available for FSA”. You will no longer be able to modify the LSA case.

## Withdrawing the case



Figure 47 Withdraw case workflow action, school user

You may also withdraw your case instead of submitting it. Withdrawing your case is a final action. If you are uncertain about whether to file, do not withdraw your case prematurely as you cannot re-instate it, even if you are still within the filing deadline.

If you have determined that you will not file, OPD expects that you will log into eCDR Appeals and withdraw the case. You can withdraw your case at any time before submitting it. If you do not withdraw the case or submit it and the deadline for filing lapses, the case will eventually be considered abandoned. This is fine.

To withdraw your case, click the **WITHDRAW CASE** button located in the Case Workflows Actions section of the page. This opens a confirmation page reminding you that the action is final.

### Withdraw Case confirmation

880120:Contiguous Geo Center University



One or more Data Managers provided your school with a representative sample of loan servicing records. Due to sampling rules, you may be eligible for an adjustment to your CDR even if your school was unable to identify any improperly serviced loans. This means that you may submit your case without any improperly serviced loans identified.



Figure 48 Confirmation page for withdrawing LSA case

To confirm your case withdrawal action, click **OK**. Or click **CANCEL** to return to the Case Details page without withdrawing the case.

## Responding to Fee Request (in general)

When a DM requests a fee for the servicing records, the system will automatically send you an email that a fee is required. You can see a list of all the DMs that requested fees in the **LOAN SERVICING APPEAL (LSA) RECORDS REQUESTS THAT REQUIRE FEES** report in the Current Status page. The DMs will probably also contact you separately. In any case, you will need to contact the DMs directly to make the payment. The eCDRA system is not able to handle payment transactions.

If you do not wish to pay the requested fee, you have the option of withdrawing your request for servicing records. You may withdraw the request to the particular DM (see **WITHDRAW REQUEST**) or, if you want, you can withdraw the whole case (see **WITHDRAWING THE CASE**).



## Show perfected



Figure 49 Show Perfected button

Clicking the **SHOW PERFECTED** button puts the Loan Servicing Records section into the “Show Perfected” mode. In this mode:

- The Loan Servicing Records section shows only the year(s) you kept selected (multiyear case only), and
- Only the data managers that provided servicing records are listed in the cohort year table.

The screenshot shows the 'Loan Servicing Records' section in 'Show Perfected' mode. It features a 'Show All' button and two cohort year tables. Each table has a header bar with the cohort year, a checkbox, and summary statistics (Data Managers, Defaulted Borrowers, Defaulted Loans). Below each header is a table with 8 columns: DM, YEAR, BORROWERS, LOANS, BORROWER SAMPLE SIZE, SAMPLED LOANS, SAMPLING METHOD, and STATUS. The tables are paginated, showing records 1-3 of 3.

**Cohort Year 2015** Data Managers: 3 Defaulted Borrowers: 452 Defaulted Loans: 1310

DM	YEAR	BORROWERS	LOANS	BORROWER SAMPLE SIZE	SAMPLED LOANS	SAMPLING METHOD	STATUS
<a href="#">555</a>	2015	125	304	95	233	Simple Random Sampling	Servicing Records Submitted
<a href="#">583</a>	2015	115	280	89	218	Systematic Sequential Sampling	Servicing Records Submitted
<a href="#">785</a>	2015	212	726	138	473	Systematic Sequential Sampling	Servicing Records Submitted

**Cohort Year 2013** Data Managers: 3 Defaulted Borrowers: 513 Defaulted Loans: 1498

DM	YEAR	BORROWERS	LOANS	BORROWER SAMPLE SIZE	SAMPLED LOANS	SAMPLING METHOD	STATUS
<a href="#">555</a>	2013	212	728	139	466	Simple Random Sampling	Servicing Records Submitted
<a href="#">583</a>	2013	188	493	129	344	Systematic Sequential Sampling	Servicing Records Submitted
<a href="#">785</a>	2013	113	277	87	215	Systematic Sequential Sampling	Servicing Records Submitted

At the bottom of the form are 'SAVE' and 'CANCEL' buttons.

Figure 50 Show perfected cohort years to appeal

In “Show Perfected” mode, the **SHOW ALL** button is available.

## Show all



Figure 51 Show All button

Clicking the **SHOW ALL** button puts the Loan Servicing Records section into the “Show All” mode. In this mode:

- All years for which servicing records were initially requested are shown in the section, and
- All data managers from whom you requested servicing records are listed in the cohort year table.

Show Perfected

☒ Cohort Year 2015 Data Managers: 3 Defaulted Borrowers: 452 Defaulted Loans: 1310

Showing 10 records (1 - 3 of 3)							
DM	YEAR	BORROWERS	LOANS	BORROWER SAMPLE SIZE	SAMPLED LOANS	SAMPLING METHOD	STATUS
555	2015	125	304	95	233	Simple Random Sampling	Servicing Records Submitted
583	2015	115	280	89	218	Systematic Sequential Sampling	Servicing Records Submitted
785	2015	212	726	138	473	Systematic Sequential Sampling	Servicing Records Submitted

Showing 10 records (1 - 3 of 3)

☐ Cohort Year 2014 Data Managers: 3 Defaulted Borrowers: 452 Defaulted Loans: 1310

Showing 10 records (1 - 3 of 3)							
DM	YEAR	BORROWERS	LOANS	BORROWER SAMPLE SIZE	SAMPLED LOANS	SAMPLING METHOD	STATUS
555	2014	125	304	95	230	Simple Random Sampling	Appeal Withdrawn
583	2014	115	280	89	220	Systematic Sequential Sampling	Servicing Records Submitted
785	2014	212	726	138	476	Systematic Sequential Sampling	Servicing Records Submitted

Showing 10 records (1 - 3 of 3)

☒ Cohort Year 2013 Data Managers: 3 Defaulted Borrowers: 513 Defaulted Loans: 1498

Showing 10 records (1 - 3 of 3)							
DM	YEAR	BORROWERS	LOANS	BORROWER SAMPLE SIZE	SAMPLED LOANS	SAMPLING METHOD	STATUS
555	2013	212	728	139	466	Simple Random Sampling	Servicing Records Submitted
583	2013	188	493	129	344	Systematic Sequential Sampling	Servicing Records Submitted
785	2013	113	277	87	215	Systematic Sequential Sampling	Servicing Records Submitted

Showing 10 records (1 - 3 of 3)

Figure 52 Show all cohort years

In “Show All” mode, the **SHOW PERFECTED** button is available.

## LSAppeal

The LSAppeal record (may also be referred to as the Year Page) collects all the Data Managers (DMs) from whom servicing records may be requested and appealed for a given cohort year.

### LSAppeal information

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Loan Servicing Appeal Details

BACK TO CASE

[Loan Servicing Appeal Templates](#)

LSAppeal Processing Actions

No available workflow actions

LSAppeal Information

LSAppeal ID: 9866

Year: 2015

Comments

Cohort Year 2015Data Managers: 3 Defaulted Borrowers: 514 Defaulted Loans: 1498

Showing10 ▾records(1 - 3 of 3)

DM	YEAR	BORROWERS	LOANS	BORROWER SAMPLE SIZE	SAMPLED LOANS	SAMPLING METHOD	STATUS
<a href="#">555</a>	2015	115	280				Servicing Records Requested
<a href="#">777</a>	2015	212	726				Servicing Records Requested
<a href="#">785</a>	2015	187	492				Servicing Records Requested

Showing10 ▾records(1 - 3 of 3)

Figure 53 LSAppeal information

The basic information for the LSAppeal consists of the year and the Data Managers (DMs) that may be appealed.

**Attached Documents**

**Decision Letter Enclosures**

FILE NAME	FILE DESCRIPTION
No documents attached	

**Borrower Information Provided by School (School Spreadsheet)**

FILE NAME	FILE DESCRIPTION	ACTION
No documents attached		

**Servicing records and documents from Data Manager 555**

FILE NAME	FILE DESCRIPTION
No documents for Data Manager 555	

**Servicing records and documents from Data Manager 777**

FILE NAME	FILE DESCRIPTION
No documents for Data Manager 777	

**Servicing records and documents from Data Manager 785**

FILE NAME	FILE DESCRIPTION
No documents for Data Manager 785	

Figure 54 LSAppeal documents

The page has a section for the documents provided by the school, see [SCHOOL SPREADSHEET](#). The documents that the DMs provided in the LSAppealDM page will also be available in its own section on this page. The page also has a section for documents that will be provided by FSA in support of the decision letter.

## LSAppeal processing actions

There are no processing actions available for the LSAppeal.

## LSAppeal DM

The LSAppeal DM page (or simply the DM page) contains the list of borrowers with defaulted loans and the servicing information from the Data Manager (DM) for the borrowers.

## LSAppeal DM information

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Loan Servicing DM Appeal Details

BACK TO CASE

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LSAppeal DM Processing Actions

LSAppeal DM Information

LSAppeal DM ID: 5829

DM: 555

Year: 2015

Status: Servicing Records Requested

Comments

Servicing Records

FILE NAME	FILE DESCRIPTION
No documents attached	

LSAppeal DM Actions

No available LSAppeal DM actions

Borrower Servicing Records

BORROWER	NUMBER OF LOANS	DM
000-49-4014 XXXXXXXXXXXXXXXXXXXX	2	555

Figure 55 LSAppealDM details page

The LSAppeal DM page contains basic information, record ID, cohort year, status, and has sections for the servicing records documents and a table that lists all the borrowers that the DM needs to provide servicing records for.

## LSAppeal DM workflow actions



Figure 56 LSAppeal DM workflow actions, school user

The processing actions available to you will depend on the status, and related conditions, of the case and DM adjustment. The possible processing actions are:

Withdraw request (see [WITHDRAW REQUEST](#))

Request clarification (see [REQUEST CLARIFICATION](#))

## LSAppeal DM actions

There are no DM adjustment actions for a school user.

## Comments

The image shows a user interface for adding and viewing comments. At the top is a 'Comment:' label next to a large text input field. Below the input field are two green buttons: 'SAVE' and 'CANCEL'. To the right of the input field are two red callout boxes: 'Comment input text field' pointing to the input field, and 'Comments history table' pointing to the table below. The table is titled 'Comments' and has four columns: 'STATUS', 'COMMENT', 'TIMESTAMP', and 'USER'. The table contains three rows of data, all with the status 'Case worker review complete'. The first two rows have a timestamp of '02/02/2018 18:53:58' and user 'ecdra.testers'. The third row has a timestamp of '02/02/2018 18:48:28' and user 'fsa.casemanager'.

Figure 57 LSAppeal DM comments, school user

You can add comments to LSAppeal DM record by typing in the Comment field and clicking **SAVE** (Figure 54). After clicking **SAVE**, the comment will be added to the Comments history table below the Comment field. Comments will only be visible to those who have access to the record (e.g., Data Managers, school users, and Federal Student Aid OPD). Adding a comment is optional.

The comment history table shows all the comments for the record.



## Withdraw request



Figure 58 Withdraw request LSAppeal DM workflow action, school user

If you do not intend to pay the requested fee, you should withdraw your request for servicing records. If you do not withdraw your request, and simply let your deadline for paying the fee pass, the Data Manager will document that the fee was not paid within the stipulated deadline.

To withdraw your fee request, click the **WITHDRAW REQUEST** button located in the LSA DM Processing Actions section. This opens the “Withdraw Selected Loan Servicing Records Request” page.

### Withdraw Selected Loan Servicing Records Request

The screenshot shows the "Withdraw Selected Loan Servicing Records Request" page. At the top right is a green button labeled "BACK TO LSAPPEALDM". Below this is a green header bar labeled "Fee Information". Underneath is a section titled "Fee request documents" which contains a table with two columns: "FILE NAME" and "FILE DESCRIPTION". The table is currently empty, with the text "No documents attached" displayed. Below the table is a section for the year "2015" with the following data: Borrowers: 125, Loans: 304, Borrower Sample Size: 95, Sampled Loans: 233. The Fee Amount is \$0.00. Below this is a section for the year "2014" with the same data: Borrowers: 125, Loans: 304, Borrower Sample Size: 95, Sampled Loans: 230. The Fee Amount is \$100.00, and there is a "Withdraw record request for 2014" button with a "No" option. Below this is a section for the year "2013" with the same data: Borrowers: 212, Loans: 728, Borrower Sample Size: 139, Sampled Loans: 466. The Fee Amount is \$100.00, and there is a "Withdraw record request for 2013" button with a "No" option. At the bottom is a "Comment:" label and a text input field. At the very bottom are two green buttons: "SAVE" and "CANCEL".

Figure 59 Withdraw servicing records requests page

The withdraw requests page includes all the cohort years applicable to the DM. The school can only withdraw requests for cohort years that the DM requested fees for. It is assumed that the school will not withdraw requests for cohort years for which no fee is requested. For example, in Figure 56, the DM did not request any fee for year 2015 but did request fees for years 2014 and 2013. You have the option to withdraw requests for 2014 and 2013 records. Withdrawing a request for servicing records after a fee is requested is a final action. If you are uncertain about what you will do, do not withdraw your request prematurely as you cannot re- instate it.

To withdraw your request for servicing records, click the button labeled “Withdraw record request for <year>”. Clicking on this button will toggle it between **No** and **Yes**. If the button says Yes, then the request for the associated year will be withdrawn. You may enter a comment in the comment box.

Year: 2015				
Borrowers:	125	Loans:	304	Borrower Sample Size: 95
		Sampled Loans:	233	
Fee Amount *	\$0.00			

Year: 2014				
Borrowers:	125	Loans:	304	Borrower Sample Size: 95
		Sampled Loans:	230	
Fee Amount *	\$100.00	Withdraw record request for 2014	<input type="button" value="Yes"/>	

Year: 2013				
Borrowers:	212	Loans:	728	Borrower Sample Size: 139
		Sampled Loans:	466	
Fee Amount *	\$100.00	Withdraw record request for 2013	<input type="button" value="No"/>	

Comment:

Figure 60 Example showing cohort year 2014 selected for withdrawal

To cancel a withdrawal action, click **CANCEL** or **BACK TO CASE**. To proceed, once you are satisfied with your selections, click **SAVE**. The system will display a confirmation page.



## Withdraw Selected Loan Servicing Records Request



- Will cancel request for servicing records for year 2015
- Requesting \$ 100 fee for year 2014 servicing records
- Will cancel request for servicing records for year 2014
- You are about to cancel your request for servicing records for the DM(s)/year(s) selected.

This action is final. Please click OK to confirm action or cancel to return to previous page.

OK

CANCEL

Figure 61 Withdraw servicing records request confirmation

Select **OK** to confirm your action. Select **CANCEL** if you do not want to proceed.

## Request clarification

LSAppeal DM Processing Actions

REQUEST CLARIFICATION

LSAppeal DM Information

Figure 62 Request clarification LSAppeal DM workflow action, school user

Providing you are within the fifteen (15) days deadline for requesting clarification and you do not already have an open request, the LSA DM Processing Actions section of the page shows a **REQUEST CLARIFICATION** button. Click this button to bring up the Clarification Request for LSA correspondence page.

## Request clarification from DM

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- If you just want to modify the file description, you must remove the document and start attaching the file anew

Clarification Request Documents

ATTACH FILE

FILE NAME	FILE DESCRIPTION	ACTION
No documents attached		

Request clarification from Data Manager:

The dates seem to be off for borrower 000-00-0001|

REQUEST CLARIFICATION

CANCEL

Figure 63 Request clarification page

You can attach documents and enter text on this page. If you are adding both, make sure you attach the documents first. Attaching a file deletes any text in the comments box without saving them and you will have to re-enter it. When you have attached the documents and entered the comments you needed click on the **REQUEST CLARIFICATION** button to send the clarification request to the Data Manager.

If you decide not to send the clarification request, click the **CANCEL** button.

## Reports (for schools)

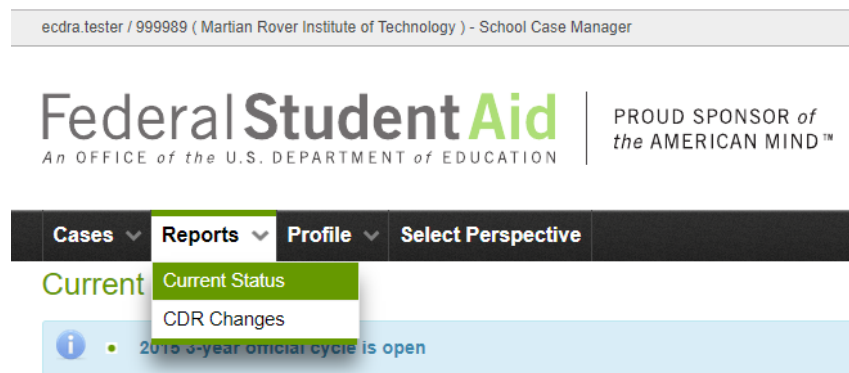


Figure 64 School reports menu options

## Current status

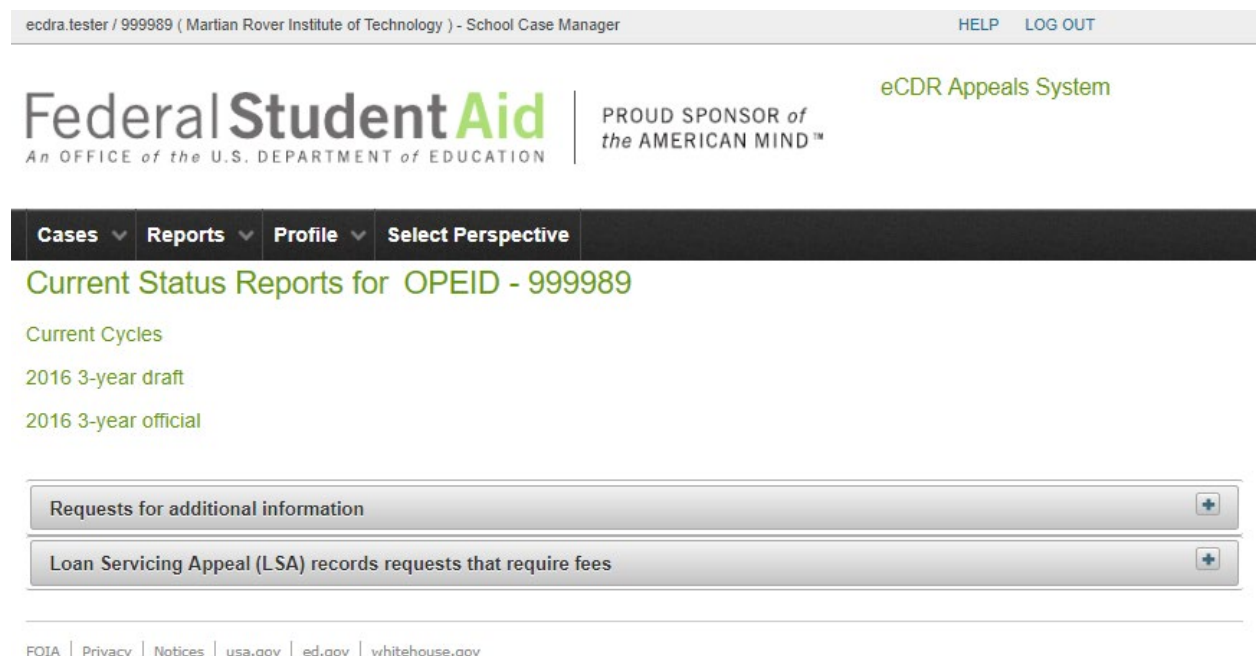


Figure 65 School current status reports, all collapsed

The current status reports provide a list of items that need your attention. This makes them easier to see, even if you do not get an email notification. The reports also provides a link to the items that need your attention (case, DM adjustment, etc...) so you can go to them directly instead of having to navigate through several levels of records, case, adjustment, dm adjustment, just to look at them.

If the report you want to look at is collapsed, click on the “+” icon on the right corner of the report header to expand it. To collapse the report, click on the “-” icon on the top right corner of the report header.

ecdra.testier / 999989 ( Martian Rover Institute of Technology ) - School Case Manager

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Select Perspective

Current Status Reports for OPEID - 999989

Current Cycles

2016 3-year draft

2016 3-year official

Requests for additional information

DM ADJUSTMENT ID	CASE ID ▾	DATA MANAGER ▾	PROVIDE ADDITIONAL INFORMATION BY
<a href="#">223342</a>	303634	785	05/16/2019

Loan Servicing Appeal (LSA) records requests that require fees

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Figure 66 School current status report, table expanded

#### Requests for additional information

This report lists all the DM adjustments for which DMs have requested additional information. The report will also display the deadline for providing the additional information.

#### Loan Servicing Appeal (LSA) records requests that require fees

Lists the LSA cases for which the DM has requested fees for providing the requested servicing records.

## CDR Changes

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Select Perspective

CDR (Cohort Default Rate) Changes Report Report for OPEID - 999989

Current Cycles

2016 3-year draft

2016 3-year official

This computation is based solely on the agreed-upon data changes included in the IDC. It is for informational purposes only. Your school's official cohort default rate will be based on information in NSLDS and may be different.

2016 3-year draft

BORROWER ↕	NUMERATOR	DENOMINATOR
000000194	1	1

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Figure 67 School CDR changes report

This report is automatically populated from the previous cycle IDC. It lists the borrowers that were included in the IDC and for which the DMs agreed to make changes. This is an easy way to check on which borrowers should have had their loan records updated in the official LRDR. Consequently, if the borrowers listed here did not have their loan records updated, those borrowers should be in the LSA.

## Data Managers

The application has multiple pages for different functions, but they all have similar elements. Please refer to the All Users **NAVIGATION** section for descriptions of these common elements.

### Navigation

#### *Data Manager roles*

Your account will be assigned one of two possible eCDR Appeals roles:

- **Response Preparer:** May update adjustment and case information.
- **Response Manager:** Has the same abilities as a Response Preparer, plus the ability to respond to the case to send it back to the school.

### Profiles

ecdra.tester / 785 ( RAVENLAW RELIEF ) - DM Response Manager

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Profile ▾

Select Perspective

Edit profile

785:RAVENLAW RELIEF

Please verify and update the following information.

Fields marked with (\*) are required

Organization Information

Organization Name: \*

RAVENLAW RELIEF

Address: \*

14 AERIE RD

City: \*

NASHUA

State:

NH - New Hampshire ▾

Zip:

03060

Country:

Organization Email: \*

fernando.felixberto+genericDM@gmail.com

Alternate Email:

Phone Number: \*

888-555-1212

Alternate Phone:

33222222222

User Contact Information

Last Name: \*

First Name: \*

Email\*: \*

Figure 68 Data Manager organization profile page

If you are the first user from your agency to log in to eCDR Appeals, you will need to complete your organizational and individual profiles, which consist of contact information. Figure 68 shows the organization contact information fields, already filled out, and the blank user contact information fields. This is where you enter your contact information. The email address will be added to the notification list so you will receive any email notifications sent by the system. Ensure that all the information is provided and is up to date, then click the **SAVE** button.

## Perspectives

If you process cases for more than one agency, you will have multiple perspectives. For example, if you process cases for DM code 777 and DM code 888, you will have separate perspectives for each one and may switch between them based on which cases you need to review.



Figure 69 DM user select perspective page

You may switch to another perspective at any time by clicking on the **PERSPECTIVE** option in the main menu and selecting a different Data Manager organization from the drop-down list.

## Menus

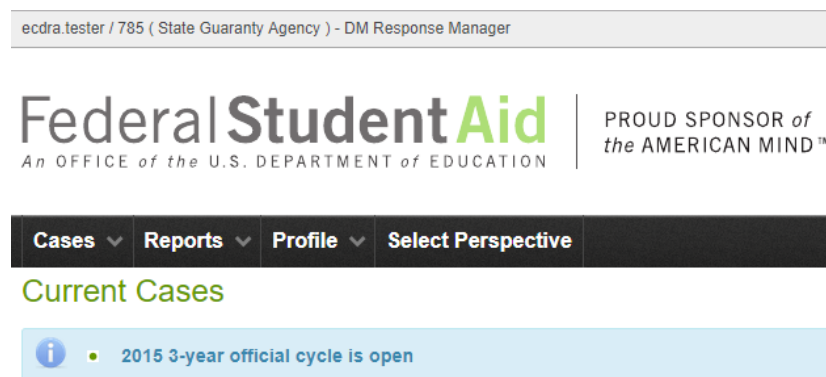


Figure 70 DM user menu bar

The menu options shown are those available for Data Manager users. The down arrow to the right of the option name indicates that there is an associated sub-menu. Selecting a menu, or sub-menu, option will open a page. The pages will be described in separate sections in this document.

Menu and sub-menu options for Data Manager users:

- Case (see CASE LISTS)
  - Current cases (see CURRENT CASES (DM VIEW))
  - Past cases (see PAST CASES (DM VIEW))
- Reports (see REPORTS (FOR DATA MANAGERS))
  - Current status (see CURRENT STATUS (FOR DM))
  - Draft cycle (see DRAFT CYCLE (FOR DM))
  - Official cycle (see OFFICIAL CYCLE (FOR DM))
- Profile (see PROFILES)
- Select Perspective (see PERSPECTIVES) – only available if user has multiple organizations

## Documents

The detailed servicing information for the LSA are provided by the Data Managers in documents that are created outside eCDR Appeals.

### Servicing records information

#### *Prepare servicing records information*

You must prepare and finalize these records outside eCDR Appeals and return to the system once the servicing records files are ready to be uploaded. You may upload material over a period of several sessions and save your work in progress each time before submitting your full response.

You may include servicing records in a ZIP/compressed file. We caution, however, that there may be browser compatibility issues that can affect access to the ZIP file after it is uploaded. Current browsers typically will not have any issues but older ones, for example Internet Explorer 8, may have problems.

#### *DM spreadsheet*

Although adding a “DM Spreadsheet” is not mandatory, it is encouraged. You may use this format to address as many or as few borrowers as you want. Like other servicing records, the “DM Spreadsheet” should focus on borrowers in a single cohort year.

The Data Manager should always include a “DM Spreadsheet” when the DM is aware of missing or illegible records for certain borrowers in a given cohort year. This will reduce unnecessary clarification requests by the School. When the Data Manager uses the “DM

Spreadsheet” to identify key servicing dates and actions that are otherwise documented in the servicing records provided, it generally facilitates the School’s work in reviewing those servicing records. The steps for uploading a “DM Spreadsheet” are the same as for uploading servicing records files.

How to start the DM Spreadsheet is entirely up to the Data Manager. There are at least three different methods available to you, two of which uses resources available from the eCDRA application.

### Use a template

As a first option, you can use the Loan Servicing Appeal (XLS) spreadsheet available from the IFAP website <https://ifap.ed.gov/DefaultManagement/guide/TemplatesSpreadshts.html>. It is under the school column (fourth from the bottom) but it will also serve as a template for the information you will provide.

### Loan Servicing Appeal Details



Figure 71 Link to Loan Servicing Appeal spreadsheet template

There is also a link to this site titled “Loan Servicing Appeal Templates” conveniently located on every LSAppeal Details page of LSA cases, just below the **BACK TO CASE** button, and above the Appeal Processing Actions section of the page. All data needs to be manually entered, including borrowers’ names and social security numbers, and the Data Manager’s code.

### Export borrower list



Figure 72 Button to export borrowers list

As a second option, you can export the list of borrowers for whom you are required to provide servicing records. You can do this by clicking on the button on the top right corner of the borrower table. The advantage of this approach is that the spreadsheet is populated for you with



all borrowers' name and social security number, number of defaulted loans and the Data Manager code.

#### Use internal system export if available

A third option might be available to you, if your internal systems enable you to extract/export key servicing information in a format consistent with the DM Spreadsheet template. It would be best if the exported information were delivered as a spreadsheet/workbook file (e.g. MS Excel, OpenOffice Calc, etc.). If you are responding to a multiyear case and intend to provide a DM Spreadsheet for more than one year in the case, you must provide a separate DM Spreadsheet for different cohort years.

#### Attaching document

The screenshot shows a web interface for attaching a document. At the top is a header bar labeled 'Servicing Records' with a minus icon on the right. Below the header is a green button labeled 'ATTACH FILE'. Underneath is a table with three columns: 'FILE NAME', 'FILE DESCRIPTION', and 'ACTION'. The table contains one row with the text 'No documents attached'.

FILE NAME	FILE DESCRIPTION	ACTION
No documents attached		

Figure 73 Attach file, DM user

To attach a document, click **ATTACH FILE** on the Data Manager Adjustment Details page.

#### Ecdra Document Upload

The screenshot shows the 'Ecdra Document Upload' page. At the top right is a green button labeled 'BACK TO DM APPEAL DETAILS'. Below it is a light blue information box with an 'i' icon and the text: 'If possible, please use one of the following file formats for your attached documents.' followed by a bullet point 'MS Excel (XLS)'. Below the information box is a green header bar labeled 'Attach LSAppeal DM Supporting Document'. Underneath is a 'Select File:' section with a 'Choose File' button and the filename 'borrowerlist...119\_2015.xls'. Below that is a 'File Description:' text box containing '2015 servicing records'. At the bottom are two green buttons: 'SAVE' and 'CANCEL'.

Figure 74 Document upload page, DM user

The Attachments page will load. Browse to the file you wish to attach to the adjustment, optionally enter a description, and select **SAVE**.

### Removing a document

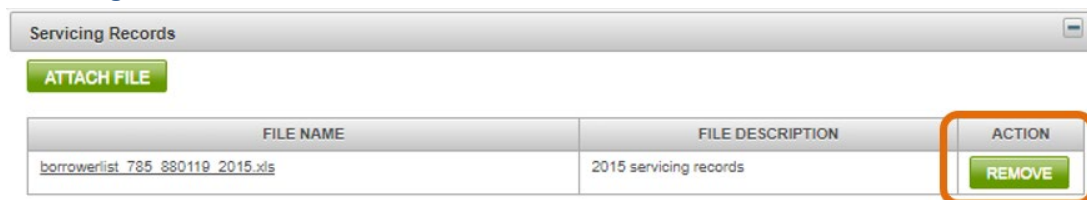


Figure 75 Remove document button, DM user

To remove a document from the DM adjustment, click the **REMOVE** button, for that document, under the Action column.

## Case lists

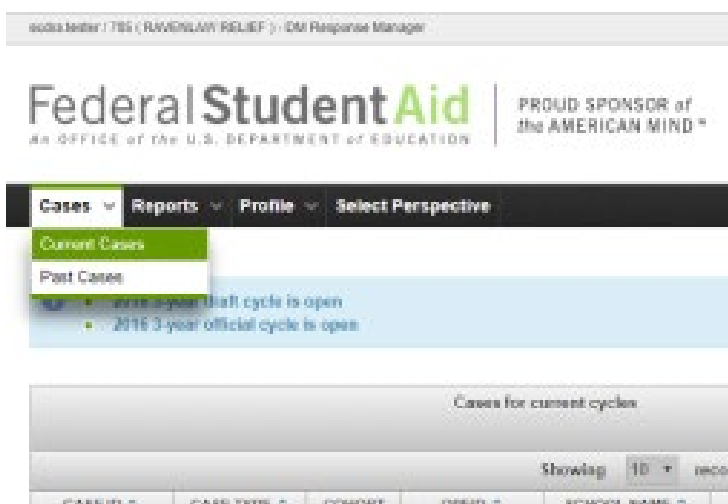


Figure 76 Cases menu options, DM user

## Current cases (DM view)

The Current Cases page lists all current cases that have been submitted to your organization for review. During the draft cycle, this would be IDCs. During the official cycle, these would be NDAs and LSAs. If a school submitted an LSA and the loans which were not corrected belong to your organization, the LSA will also show up on this page.

dm555.test555.fsa / 555 ( U.S. Department of Education, Default Prevention and Mgt ) - DM Response Manager [HELP](#) [LOG OUT](#)

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**Cases** ▾ **Reports** ▾ **Profile** ▾

Current Cases

• 2015 3-year official cycle is open

Cases for current cycles

Showing 10 ▾ records (1 - 5 of 5) [RESET FILTERS](#)

CASE ID ▾	CASE TYPE ▾	COHORT YEAR	OPEID ▾	SCHOOL NAME ▾	STATUS ▾	STATUS DATE	DM RESPONSE DUE DATE
<a href="#">303910</a>	3-YR IDC	2015	880012	Geographic Center University	Closed	02/01/2018	Responded on 02/01/2018
<a href="#">303915</a>	3-YR UDA	2015	880012	Geographic Center University	Closed	02/02/2018	
<a href="#">303920</a>	3-YR NDA	2015	880015	Geographic Center University	Submitted	02/04/2018	03/07/2018
<a href="#">303919</a>	3-YR NDA	2015	880014	Geographic Center University	Case manager decision review	02/02/2018	Responded on 02/02/2018
<a href="#">303916</a>	3-YR LSA	2015	880013	Geographic Center University	Caseworker review	02/01/2018	Responded on 02/01/2018

Showing 10 ▾ records (1 - 5 of 5) [1](#)

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Figure 77 Current cases list, DM user

If a case is “Submitted” or in “Data Manager Review”, the response due date will be displayed in the rightmost column. Once you have responded, the date you responded will be displayed in the rightmost column. To choose an LSA to review, select the case ID number of the desired case. This will load the Case Details page.

## Past cases (DM view)

ecdra.testter / 785 ( RAVENLAW RELIEF ) - DM Response Manager

HELP LOG OUT

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Cases ▾ Reports ▾ Profile ▾ Select Perspective

Past Cases

Cases for past cycles

Showing 10 records (1 - 10 of 38)

RESET FILTERS

CASE ID ▾	CASE TYPE ▾	COHORT YEAR ▾	OPEID ▾	SCHOOL NAME ▾	STATUS ▾	CLOSE DATE
<a href="#">303300</a>	3-YR IDC	2011	880031	Geographic Center University 32	Closed	
<a href="#">303301</a>	3-YR IDC	2011	880032	Geographic Center University 33	Caseworker review	
<a href="#">303302</a>	3-YR IDC	2011	880033	Geographic Center University 34	Caseworker re-review	
<a href="#">303303</a>	3-YR IDC	2011	880034	Geographic Center University 35	Available for case manager review	
<a href="#">303304</a>	3-YR IDC	2011	880035	Geographic Center University 36	Case manager review	
<a href="#">303450</a>	3-YR IDC	2011	880020	Geographic Center University 21	Caseworker review	

Figure 78 Past cases list, DM user

The Past Cases page lists all cases that have been submitted to your organization for review from previous cohort years.

## Case

### Case information

ecdra.test@ / 785 ( State Guaranty Agency ) - DM Response Manager

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Cases ▾

Reports ▾

Profile ▾

Select Perspective

### Case Details

880121:Contiguous Geo Center University

Workflow Actions

REQUEST FEES

PROVIDE SERVICING RECORDS

Case Information

Case ID:

303928

Cohort Year:

2015

Case Type:

3-YR LSA

Status:

Servicing records requested

Status Date:

01/23/2018

Comment:

SAVE

CANCEL

Comments

Case Actions

No available case actions

Figure 79 Case details page, DM user

The OPEID and name of the school that submitted the case is displayed below the common message area. Below that is the case Workflow Actions section, separated from the previously described elements by a green bar. This section is described in more below in CASE WORKFLOW ACTIONS (DM USER).

Below the workflow actions section is the Case Information section which includes the basic information about the case (ID, status, etc), and comments. Below that is the Case Actions section (see CASE ACTIONS (DM USER)) and below that is the Loan Servicing Records section. This section contains tables for every year for which the school requested servicing records.

**Loan Servicing Records**

Cohort Year 2015

Data Managers: 1 Defaulted Borrowers: 187 Defaulted Loans: 492

Showing 10 records (1 - 1 of 1)

DM	YEAR	BORROWERS	LOANS	BORROWER SAMPLE SIZE	SAMPLED LOANS	SAMPLING METHOD	STATUS
<a href="#">785</a>	2015	187	492	128	344	Systematic Sequential Sampling	Servicing Records Requested

Showing 10 records (1 - 1 of 1)

Cohort Year 2014

Data Managers: 0 Defaulted Borrowers: 0 Defaulted Loans: 0

Showing 10 records (0 - 0 of 0)

DM	YEAR	BORROWERS	LOANS	BORROWER SAMPLE SIZE	SAMPLED LOANS	SAMPLING METHOD	STATUS
No records found							

Showing 10 records (0 - 0 of 0)

Cohort Year 2013

Data Managers: 0 Defaulted Borrowers: 0 Defaulted Loans: 0

Showing 10 records (0 - 0 of 0)

DM	YEAR	BORROWERS	LOANS	BORROWER SAMPLE SIZE	SAMPLED LOANS	SAMPLING METHOD	STATUS
No records found							

Showing 10 records (0 - 0 of 0)

SAVE

CANCEL

Figure 80 Loan servicing records section of case page, DM user

## Case workflow actions (DM user)

**Workflow Actions**

REQUEST FEES

PROVIDE SERVICING RECORDS

**Case Information**

Figure 81 Case workflow actions section, DM user

The processing actions available to you will depend on the status, and related conditions, of the case and DM adjustment. The possible processing actions are:

Sample records (see [SAMPLE RECORDS](#))

Request fees (see [REQUEST FEES](#))

Provide servicing records (see [PROVIDE SERVICING RECORDS](#))

Resolve fee (see [UPDATE FEE REQUEST OUTCOME](#))

Update fee (see [AMENDING FEE DISPOSITION](#))

### Case actions (DM user)

There are no case actions available for DM users.

### Comments

The screenshot shows a user interface for adding and viewing comments. At the top, there is a 'Comment:' label followed by a text input field. Below the input field are two buttons: 'SAVE' and 'CANCEL'. To the right of the input field, a callout box points to it with the text 'Comment input text field'. Below the input field and buttons is a table titled 'Comments'. A callout box points to the table with the text 'Comments history'. The table has four columns: 'STATUS', 'COMMENT', 'TIMESTAMP', and 'USER'. The 'USER' column has a small input field next to it. The table contains five rows of data, showing the history of case status changes and comments.

STATUS	COMMENT	TIMESTAMP	USER
Servicing records being prepared	Servicing records being prepared	01/24/2018 1448:37	ecdra.testar
Awaiting LRDR	Due date to submit case to DM is updated to 02/08/2018	01/24/2018 1448:36	System User
Awaiting LRDR	Awaiting LRDR	01/24/2018 1438:14	System User
Case created	Due date to submit case to DM will be computed and set.	01/24/2018 1438:13	System User
Case created		01/24/2018 1438:13	88012000.user

*Figure 82 Case comment field and comments history table, DM user*

A Comments table displays the history of the case showing statuses, comments, and the time stamp and user when the statuses and comments were recorded. The history is arranged in reverse chronological order, with the most recent status change or comment at the top. Comments may be generated by the system or entered by a user. When available, you may add comments to your case by typing in the comment text box and clicking **SAVE**. Anyone who has access to the case can see all the comments associated with that case. Once saved, comments cannot be removed. Adding a comment is optional for a user.

## Sample records

Cohort Year 2015      Data Managers: 1   Defaulted Borrowers: 187   Defaulted Loans: 492							
Showing 10 records (1 - 1 of 1) 1							
DM	YEAR	BORROWERS	LOANS	BORROWER SAMPLE SIZE	SAMPLED LOANS	SAMPLING METHOD	STATUS
785	2015	187	492				Servicing Records Requested
Showing 10 records (1 - 1 of 1) 1							

Figure 83 More than 100 borrowers will require sampling

Whenever there are more than 100 defaulted borrowers in the LRDR, the Data Manager (DM) must generate a random sample of borrowers for whom servicing records will be provided.



Figure 84 Sample records case workflow action, DM user

Sampling is a prerequisite to completing any other DM function. The system has been designed to carry out sampling functions consistent with Federal Student Aid's guidance. The Sample Records workflow action only becomes available when there are more than 100 defaulted borrowers for the DM. To start sampling, click the Sample Records button. This opens the Sampling for Loan Servicing Appeal sampling method selection page

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Cases ▾ Reports ▾ Profile ▾ Select Perspective

Sampling for Loan Service Appeal

880121:Contiguous Geo Center University

Select sampling method to use for borrowers

OK CANCEL

Systematic Sequential Sampling ▾  
Systematic Sequential Sampling  
Simple Random Sampling

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Figure 85 Sampling methods drop-down list



In the drop-down combo box, the data manager can select between a *Systematic Sequential Sampling* or a *Simple Random Sampling* method. Click **OK** to complete the sampling selection. The same sampling method will be applied to all applicable years in a multiyear case. Once selected, your sampling method cannot be changed.

Cohort Year 2015      Data Managers: 1   Defaulted Borrowers: 187   Defaulted Loans: 492							
Showing 10 records (1 - 1 of 1) 1							
DM	YEAR	BORROWERS	LOANS	BORROWER SAMPLE SIZE	SAMPLED LOANS	SAMPLING METHOD	STATUS
<a href="#">785</a>	2015	187	492	128	344	Systematic Sequential Sampling	Servicing Records Requested
Showing 10 records (1 - 1 of 1) 1							

Figure 86 Resulting sample from 187 borrowers

The system now displays the sampling information on the Case Details page. For each year where sampling was applied, the cohort year summary table now displays the number of defaulted borrowers and defaulted loans in the sample, along with the sampling methodology applied

## Request fees

Data Managers may require a fee be paid before providing servicing records. If you plan to require a fee for any year in the case, proceed as described below.

Fee requests are prepared and submitted in one sitting. In other words, and unlike other LSA processes, you cannot save fee request material and return later to submit them. You should therefore prepare ahead of time any file you want to submit as an attachment that describes the details of your request, such as payment instructions, fee amount and the like.



Figure 87 Request fees case workflow action, DM user

Click the **REQUEST FEES** button to open the Request Fees for Loan Servicing Records Request data entry page.

dm888.test888.fsa / 888 ( GRIMM STUDENTS ASSISTANCE ) - DM Response Manager [HELP](#) [LOG OUT](#)

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Cases ▾ Reports ▾ Profile ▾

Request Fees for Loan Servicing Records Request

BACK TO CASE

Fee Information

Fee request documents

⚠ If possible, please use one of the following file formats for your attached documents.

- Portable Document Format (PDF)
- MS Excel (XLS)
- MS Word (DOC)
- Rich Text Format (RTF)
- Plain text (TXT)
- Pictures (JPG/PNG/GIF)

This is to ensure that everyone reviewing your case can view the documents properly.

ATTACH FILE

FILE NAME	FILE DESCRIPTION	ACTION
No documents attached		

Year: 2015

Borrowers: 1   Loans: 2   Borrower Sample Size:   Sampled Loans:

Fee Amount(Enter 0 if no fee will be requested) \*

Comment:

SAVE CANCEL

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Figure 88 Request fees page

Fill out the form completely (you cannot save this form part way and return later).

- You may attach a single document, such as a fee request letter that contains fee payment instructions. (Note: There is no need to include the listing of borrowers for which the fee applies as the system will display this listing to the school automatically.)

- You must enter the fee amount for each year in the case. If you do not require a fee for all years in the case, enter 0 (zero) in the Fee Amount field where no fee is required. Do not enter a \$ (dollar sign); the number entered is assumed to be in dollars.
- You may enter a comment.

When you are satisfied that your fee request is correct and complete, click the **SAVE** button at the bottom of the page. You will then be presented with a confirmation page.

The screenshot shows the top navigation bar with the user 'dm888.test888.fsa / 888 ( GRIMM STUDENTS ASSISTANCE ) - DM Response Manager' and links for 'HELP' and 'LOG OUT'. Below this is the 'Federal Student Aid' logo, identifying it as an office of the U.S. Department of Education and a proud sponsor of 'the AMERICAN MIND™'. The 'eCDR Appeals System' logo is also present. A dark navigation bar contains 'Cases', 'Reports', and 'Profile' with dropdown arrows. The main heading is 'Fee Disposition for Loan Servicing Records Request'. A light blue information box contains an 'i' icon and two bullet points: 'Requesting \$ 2 fee for year 2015 servicing records' and 'Please ensure your fee request is complete. Once submitted, you cannot modify your fee request.' Below this, a message states 'This action is final. Please click OK to confirm action or cancel to return to previous page.' and there are 'OK' and 'CANCEL' buttons. At the bottom, a footer contains links for 'FOIA', 'Privacy', 'Notices', 'usa.gov', 'ed.gov', and 'whitehouse.gov'.

Figure 89 Fee request confirmation page

Click **OK** to confirm your request, or **CANCEL** to go back and make changes. After clicking **OK**, the Loan Servicing DM Appeals Page(s) and the Case Details Page are updated to reflect a new status. The system will send email notification to the school about your request, and the School also has a report that shows any fee requests.

The fee is paid outside eCDR Appeals. It is the Data Manager's responsibility to document whether the school paid the fee or not.

## Update Fee Request Outcome

If the School withdrew its request for servicing records following a fee request, you do not need to take any action for the year(s) withdrawn. Otherwise, it is your responsibility to document the outcome of a fee request in eCDR Appeals.

The screenshot shows a green bar labeled 'Workflow Actions'. To the right of this bar, the 'RESOLVE FEE' button is highlighted with an orange border.

Figure 90 Resolve fee case workflow action, DM user

To document what occurred with the fee request, click the **RESOLVE FEE** button in the Case Workflow Actions section.

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eCDR Appeals System

Cases ▾ Reports ▾ Profile ▾ Select Perspective

Fee Disposition for Loan Servicing Records Request

BACK TO CASE

Fee Information

Fee request documents

⚠ If possible, please use one of the following file formats for your attached documents.

- Portable Document Format (PDF)
- MS Excel (XLS)
- MS Word (DOC)
- Rich Text Format (RTF)
- Plain text (TXT)
- Pictures (JPG/PNG/GIF)

This is to ensure that everyone reviewing your case can view the documents properly.

ATTACH FILE

FILE NAME	FILE DESCRIPTION	ACTION
No documents attached		

Year: 2015

Borrowers: 187   Loans: 492   Borrower Sample Size: 128   Sampled Loans: 344

Fee Amount \* \$1.00   Select new status for fee request

No update   **Fee paid**   Fee not paid

Comment:

SAVE   CANCEL

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Figure 91 Fee disposition page

This will open the Fee Disposition for Loan Servicing Records Request page, where you can document and submit the fee disposition information. If you wish, you may attach a file, such as evidence that the fee was paid, on this page. You may also add a comment. For the disposition, you may select from three radio buttons. There is **NO UPDATE**, **FEE PAID**, and **FEE NOT PAID**.

The **NO UPDATE** button is used if you have requested fees for multiple years and there is one request that you do not have an update for yet. In that case, you select **NO UPDATE** for that request and either **FEE PAID**, or **FEE NOT PAID** for the other requests.

The **FEE PAID** button is to indicate that the fee was paid. The **FEE NOT PAID** button is to indicate that the fee was not paid within the allotted time, fifteen (15) days, for the school to pay the fee.

After you have selected the proper fee disposition, click **SAVE**. This will bring up a confirmation page.

The screenshot shows the top navigation bar with the user 'eodra.testar / 785 (State Guaranty Agency) - DM Response Manager' and links for 'HELP' and 'LOG OUT'. Below this is the 'Federal Student Aid' logo and the text 'PROUD SPONSOR of the AMERICAN MIND™'. The main header area contains a dark bar with tabs: 'Cases', 'Reports', 'Profile', and 'Select Perspective'. Below the tabs, the title 'Request Fees for Loan Servicing Records Request' is displayed. A light blue information box contains three bullet points: 'Marking fee request for year 2015 as paid', 'Please ensure your fee resolution information is complete.', and 'Unpaid requests will be closed out as not needing servicing records.' Below the information box, a message states 'Please click OK to confirm action or cancel to return to previous page.' At the bottom of the form are two green buttons: 'OK' and 'CANCEL'. The footer contains links for 'FOIA', 'Privacy', 'Notices', 'usa.gov', 'ed.gov', and 'whitehouse.gov'.

Figure 92 Fee disposition confirmation page

Click Ok to confirm or Cancel to discard your fee disposition action. If you click **OK**, the LSAppeal DM record associated with the request will be updated accordingly.

## Amending fee disposition

The screenshot shows a green bar labeled 'Workflow Actions'. Below this bar are two buttons: 'PROVIDE SERVICING RECORDS' and 'UPDATE FEE'. The 'UPDATE FEE' button is highlighted with an orange rectangular box.

Figure 93 Update fee case workflow action, DM user

In the event you need to make a modification to your Fee Disposition information due to an error, you can update the data by clicking the **UPDATE FEE** button that appears in the Case Workflow Actions section of the Case Details Page once you have documented fee disposition. This opens the same fee disposition page that you used for resolving fee disposition. Please refer to **UPDATE FEE REQUEST OUTCOME**.

## Provide servicing records

You must attach at least one file, the DM spreadsheet, for each cohort year in the case. You may attach as many separate files as you need to support the loan servicing information.

Please refer to [SERVICING RECORDS INFORMATION](#) on how to prepare and attach the DM spreadsheet.



Figure 94 Provide servicing records case workflow action, DM user

Click the **PROVIDE SERVICING RECORDS** button in the Case Workflow Actions section. The system performs a check for files attached to each cohort year. If you have not provided servicing information for a cohort year, then you will get an error message.

### Case Details

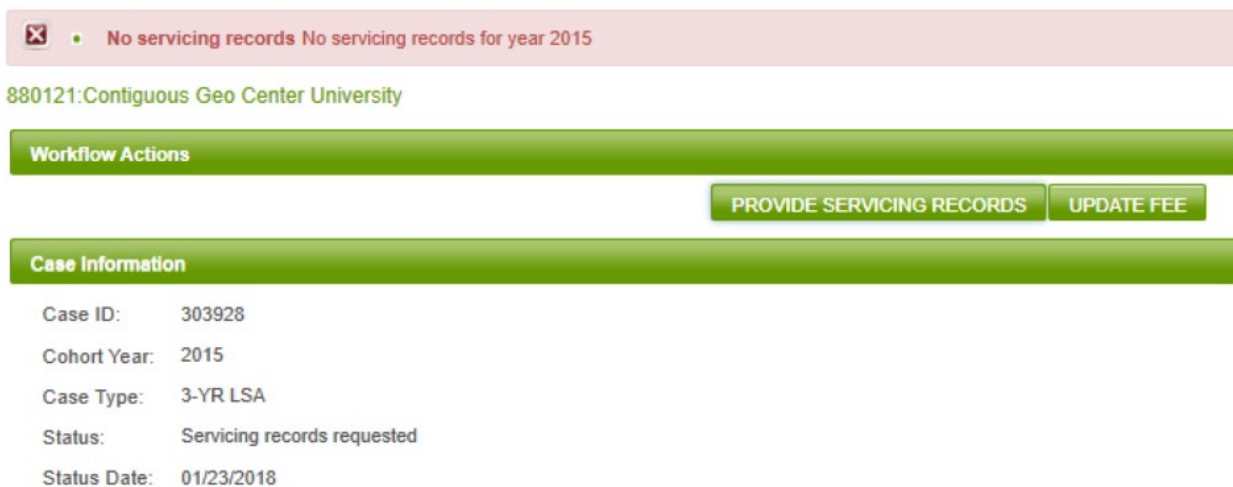
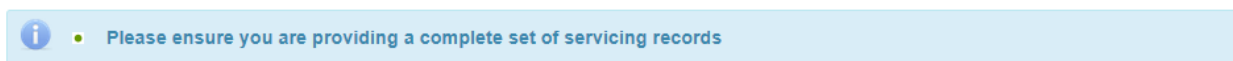


Figure 95 No servicing records error

If you have attached at least one file to each cohort year, you will get a confirmation page.

### Provide Servicing Records

880119:Contiguous Geo Center University



Click OK to provide servicing records requested by the school, click Cancel to return to case details.



Figure 96 Provide servicing records confirmation page

Click **OK** if you have attached all the servicing records you needed to provide. Click **CANCEL** if you need to go back and update anything on the case. After you confirm your submission, the system returns you to the Current Cases page where you can see in the Response Due Date column the date you responded to the school with servicing records.



## LSAppeal DM

### LSAppeal DM information

ecdra.testar / 785 ( State Guaranty Agency ) - DM Response Manager

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Cases ▾Reports ▾Profile ▾Select Perspective ▾

Loan Servicing DM Appeal Details

BACK TO CASE

880121:Contiguous Geo Center University

LSAppeal DM Processing Actions

LSAppeal DM Information

LSAppeal DM ID: 5832

DM: 785

Year: 2015

Status: Servicing Records Requested

Comment:

SAVECANCEL

Comments

Servicing Records

ATTACH FILE

FILE NAME	FILE DESCRIPTION	ACTION
No documents attached		

LSAppeal DM Actions

CHANGE DATA MANAGER

Figure 97 LSAppeal DM information

The LSAppeal DM page contains basic information (record ID, cohort year, status), a section for the servicing records documents, and a table that lists all the borrowers that you need to provide servicing records for. If there are 100 or more borrowers for the cohort year, the borrowers table will be unpopulated until the borrowers have been sampled. After sampling, the borrowers picked for the sample will be listed.

You can also view defaulted loans details for a given borrower by clicking on each Borrower ID in the table. When you click on a borrower SSN/Name, the system opens the Borrower Loan Servicing Information for LSA page.

### Borrower Loan Servicing Information for LSA

[BACK TO CASE](#)

**Borrower for cohort year 2015 LSA**

Borrower SSN: 000395271  
Borrower Name: Dxxxxx A. Rxxxxxx

**Servicing Records for Year 2015**

FILE NAME	FILE DESCRIPTION
<a href="#">borrowerlist_785_880119_2015.xls</a>	2015 servicing records

**Servicing Records for Borrower**

FILE NAME	FILE DESCRIPTION
No documents attached	

**Loan Information**

LOAN TYPE	DATA MANAGER	DATA MANAGER ROUTED TO	LOAN STATUS	REPAYMENT DATE	DEFAULT DATE	START DATE	END DATE	GUARANTY DATE	AMOUNT	CDR USAGE1
D2	785	785	DU	01/28/2012	03/09/2013	01/11/2010	07/28/2010	02/04/2010	\$5,000.00	E
D2	785	785	DU	01/28/2012	03/09/2013	08/16/2010	05/09/2011	09/09/2010	\$3,090.00	E
D2	785	785	DU	01/28/2012	03/09/2013	08/18/2008	05/12/2009	09/10/2008	\$4,120.00	E

Figure 98 Borrower loan servicing information page

### LSAppeal DM processing (workflow) actions

**LSAppeal DM Processing Actions**

[PROVIDE CLARIFICATION](#)

Figure 99 LSAppealDM processing actions section, DM user

The processing actions available to you will depend on the status, and related conditions, of the case and DM adjustment. The possible processing actions are:

Provide clarification (see [PROVIDE CLARIFICATION](#))

Provide additional data (see [PROVIDING ADDITIONAL INFORMATION TO FSA](#))



## LSAppeal DM actions



There is one action available for LSAppeal DM for the Data Manager user:

Change Data Manager (see [CHANGE DATA MANAGER](#))

## Comments

The image shows a "Comments" form and a "Comments" history table. The form has a "Comment:" label, a text input field, and "SAVE" and "CANCEL" buttons. The history table has columns for STATUS, COMMENT, TIMESTAMP, and USER. Two comments are listed in the table.

STATUS	COMMENT	TIMESTAMP	USER
Created	Loans were redirected from DM 785 to DM 888. Additional servicing records should be provided for these loans.	01/24/2018 13:59:41	eodra.testter
Created	More records requested	01/24/2018 13:59:41	eodra.testter

Figure 100 LSAppeal DM comments

The Loan Servicing DM Appeal Details page includes a Comment data entry field. To add a comment, enter text in the Comment field and click **SAVE**. The comment will be added to the Comments history table. Adding a comment is optional.

## Provide clarification



Figure 101 Provide clarification LSAppeal DM workflow action, DM user

Click the **PROVIDE CLARIFICATION** button in the LSAppeal DM Processing Actions section of the LSAppeal DM page. This opens the Provide Clarification page.

## Provide clarification to school

880119:Contiguous Geo Center University

 • If you just want to modify the file description, you must remove the document and start attaching the file anew

Clarification Request Documents

ATTACH FILE

FILE NAME	FILE DESCRIPTION	ACTION
<a href="#">Loans Stuff.xlsx</a>	Clarification Request Document: - Clarified better	REMOVE

Provide clarification to school:

Circumstances explained

RETURN CLARIFICATIONCANCEL

Figure 102 Provide clarification correspondence page

If you have files to send for the clarification, use the **ATTACH FILE** button to open the upload page for attaching files to the appeal. You may attach as many files as you need to. You may add additional comments in the text box. Be sure you have attached all the files you need to before typing in text. If you type text and then attach a file, the text you have typed will be discarded and you will need to retype them.

When you are ready to send the clarification information to the school, click the **RETURN CLARIFICATION** button at the bottom of the page.

## Providing additional information to FSA

LSAppeal DM Processing Actions

FWD TO FSA

Figure 103 Forward to FSA LSAppeal DM workflow action, DM user

Click the **FWD TO FSA** (forward to FSA) button. This opens the Additional Data Request for LSA page.

## Additional data Request for LSA

880013:Geographic Center University

 • Comment is required. Uploading attachment(s) is optional. Please upload attachment(s) first.

Request Additional Information from DM

ATTACH FILE

FILE NAME	FILE DESCRIPTION	ACTION
<a href="#">Still more loans stuff.xlsx</a>	Additional Data Request Document: - Need just a little more info on these loans	
<a href="#">Loans Stuff.xlsx</a>	Additional Data Request Document: - more information for loans	REMOVE

Respond additional information by DM:

Information requested

OKCANCEL

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Figure 104 Additional data request page

If you have files to provide additional data with, use the **ATTACH FILE** button to open the upload page for attaching files to the appeal. Note that if FSA attached a file when they requested additional data, that file will also be listed here but the **REMOVE** button will not be available for it. You can only remove files you attached. You may attach as many files as you need to. Be sure you have attached all the files you need to before typing in text. If you type text and then attach a file, the text you have typed will be discarded and you will need to retype them.

When you are ready to send the additional information to FSA, click the **OK** button at the bottom of the page.

## Change Data Manager

The Data Manager assignment is based on the holder of the loan at the time the rates are calculated and the LRDR files are produced by the National Student Loan Data System. There may be instances when you are no longer the holder of a loan, and you need to redirect the request for servicing records to another data manager. If you requested a fee, you must wait until after the fee is paid to change data manager.

### LSAppeal DM Actions

CHANGE DATA MANAGER

Figure 105 Change data manager LSAppeal DM action, DM user

Click the Change Data Manager button in the LSAppeal DM Actions section of the page. This opens the “Change Data Manager – Select Borrower” page showing a full listing of borrowers to choose from.

### Change Data Manager - Select Borrower

BACK TO LSAPPEALDM

:

**Borrowers**

BORROWER	DM
<u>000-83-9592</u> <u>Mxxxx A. Pxxxxxx</u>	785
<u>000-83-9838</u> <u>Lxxxxxxx E. Txxxxx</u>	785
<u>000-83-9991</u> <u>Sxxxxxx L. Yxxxx</u>	785
<u>000-84-1051</u> <u>Axxxxxx Oxxxx</u>	785

Figure 106 Select borrower page for data manager change

Select the borrower whose loans must be redirected, by clicking on the Borrower’s SSN or name. This will open the “Change Data Manager” page.

### Change Data Manager

BACK TO LSAPPEALDM

:

**Borrower Loans Information**

LSAppeal DM ID: 5883  
Borrower SSN: 000839838  
Borrower Name: Txxxxx, Lxxxxxxx E.  
Number of Loans: 2

Select DM Code: \* 555 - U.S. Department of Education, Default Prevention and Mgt ▼

**Loans**

SELECTED	LOAN ID	LOAN TYPE	DM	LOAN STATUS	REPAYMENT DATE	DEFAULT DATE	CDR USAGE1
<input checked="" type="checkbox"/>	<u>1739461</u>	D2	785	DD	05/20/2012	04/02/2014	E
<input checked="" type="checkbox"/>	<u>1739462</u>	D1	785	DD	05/20/2012	04/02/2014	E

SAVE CANCEL


Figure 107 Change data manager page

This page shows the borrower SSN and name and the loans for that borrower. Select the DM Code from the drop-down list and identify the loans to be redirected by checking the check box at left of each loan. Note that if you need to redirect the loans for the borrower to two different data managers, you must do it one data manager at a time. That is, select loans for one data manager and redirect those, then go through the same process for the next data manager, and so on. At any time, you can click **CANCEL** to leave the page and discard any choices you have made. After you have selected the loans and the data manager that the loans will be redirected to, click **SAVE** to redirect the loans. A confirmation page describing the changes you are about make will open.

### Confirm Data Manager Change

[BACK TO LSAPPEALDM](#)

:

 • The following loans will be forwarded to DM 555

**Borrower Loans Information**

LSAppeal DM ID: 5883  
Borrower SSN: 000839838  
Borrower Name: Txxxxxx, Lxxxxxxx E.  
Number of Loans: 2

Loans							
SELEC	LOAN ID	LOAN TYPE	DM	LOAN STATUS	REPAYMENT DATE	DEFAULT DATE	CDR USAGE1
<input checked="" type="checkbox"/>	<a href="#">1739461</a>	D2	785	DD	05/20/2012	04/02/2014	E
<input checked="" type="checkbox"/>	<a href="#">1739462</a>	D1	785	DD	05/20/2012	04/02/2014	E

[OK](#) [CANCEL](#)

Figure 108 Data manager change confirmation page

Make sure your transfer action is correct. This action is final. Select **OK** to confirm. The system will notify the “receiving” data manager(s) of your redirect actions. The new DM(s) will be asked to provide servicing records to the school. You do not need to take other steps for loans you redirected to other Data Managers.

## Reports (for Data Managers)

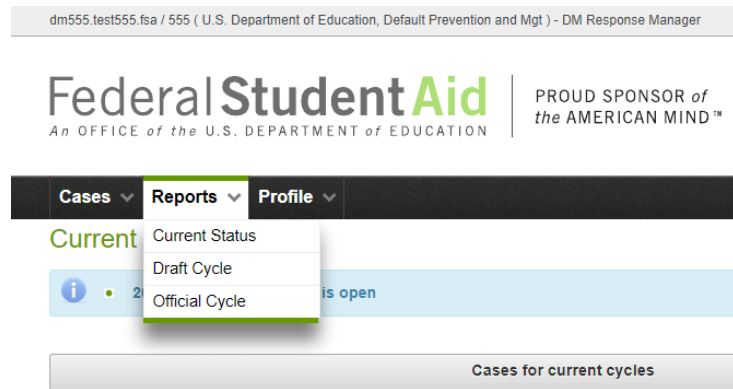


Figure 109 Reports menu options, DM user

## Current Status (for DM)

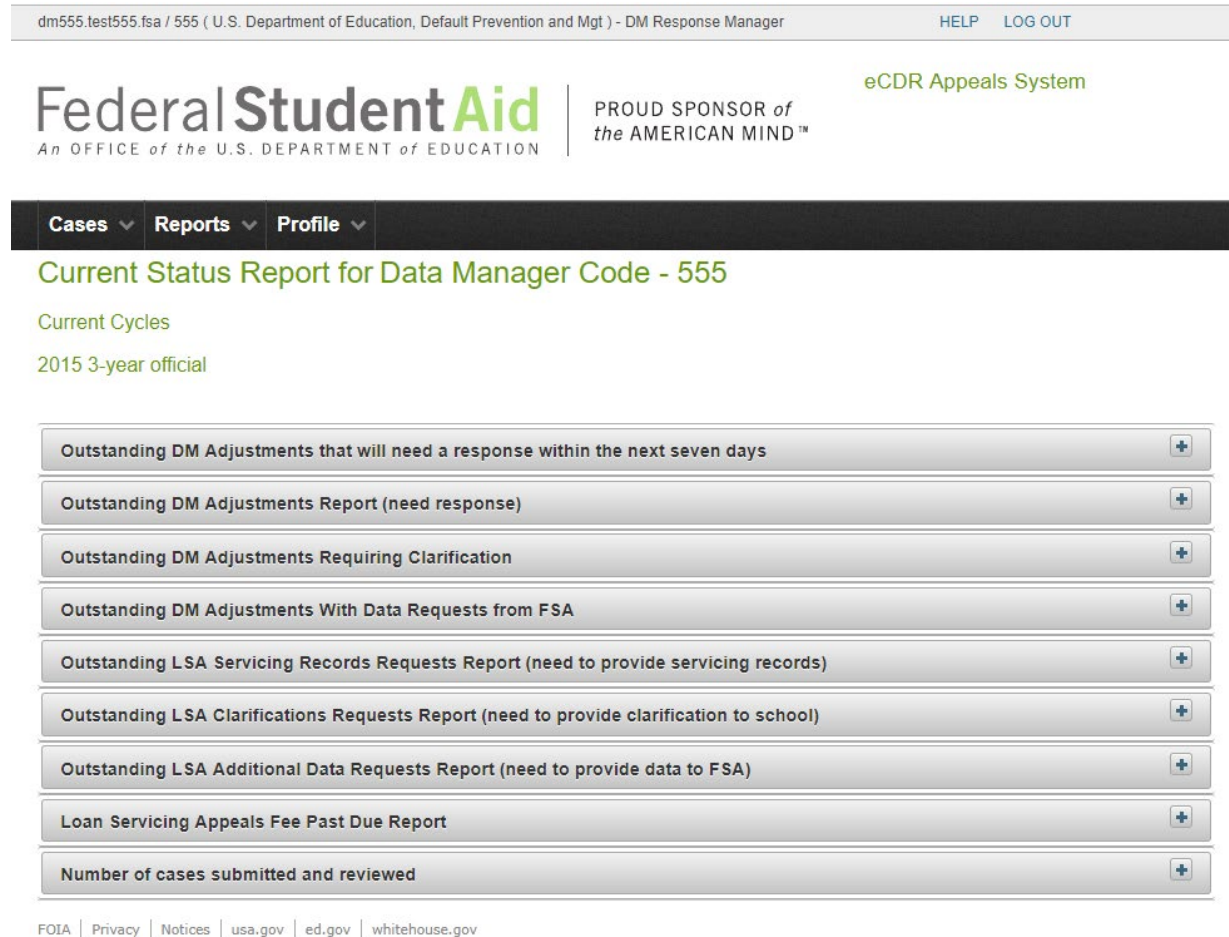


Figure 110 Current status reports page, DM user

This page contains reports for cases that are currently being processed. They are designed primarily to list items that have a deadline. You should check these reports regularly as they will help avoid missing deadlines and ending up with overdue responses. Because of the number of reports on this page, they are all initially collapsed. If you wish to view a specific report you can expand it by clicking the “+” icon on the right corner of the report header.

Cases ▾

Reports ▾

Profile ▾

Current Status Report for Data Manager Code - 555

Current Cycles

2015 3-year official

Outstanding DM Adjustments that will need a response within the next seven days

+

Outstanding DM Adjustments Report (need response)

-

DM ADJUSTMENT ID ▾

CASE ID ▾

OPEID ▾

No cases found

Outstanding DM Adjustments Requiring Clarification

+

Outstanding DM Adjustments With Data Requests from FSA

+

Outstanding LSA Servicing Records Requests Report (need to provide servicing records)

+

Outstanding LSA Clarifications Requests Report (need to provide clarification to school)

+

Outstanding LSA Additional Data Requests Report (need to provide data to FSA)

+

Loan Servicing Appeals Fee Past Due Report

+

Number of cases submitted and reviewed

-

CASE TYPE	NUMBER OF CASES SUBMITTED	NUMBER OF CASES BEING REVIEWED	NUMBER OF CASES RESPONDED TO
3-YR NDA	1	0	0

Figure 111 Current status reports page, tables expanded, DM user

*Outstanding DM Adjustments that will need a response within the next seven days*

Lists DM adjustments for cases that have been submitted, or in DM review and need a response, and the deadline to respond is 7 or fewer days.

*Outstanding DM Adjustments Report (need response)*

Lists DM adjustments for cases that have been submitted, or in DM review and need a response.



*Outstanding DM Adjustments Requiring Clarifications*

Lists DM adjustments for which schools requested clarification.

*Outstanding DM Adjustments With Data Requests from FSA*

Lists DM adjustments for which FSA has requested additional information.

*Outstanding LSA Servicing Records Requests Report (need to provide servicing records)*

List of LSA cases for servicing records that schools are waiting for.

*Outstanding LSA Clarifications Requests Report (need to provide clarification to school)*

List of clarification requests that schools are waiting for.

*Outstanding LSA Additional Data Requests Report (need to provide data to FSA)*

List of additional data requests that FSA is waiting for.

*Loan Servicing Appeals Fee Past Due Report*

List of fee requests for cases that DM sent and schools have not responded to within the allotted time. DMs has the option of responding to these cases as 'fees not paid' and not have to provide the requested servicing records.

*Number of cases submitted and reviewed*

Total of cases that you have received and processed for the currently open cycles.



## Draft Cycle (for DM)

dm555.test555.fsa / 555 ( U.S. Department of Education, Default Prevention and Mgt ) - DM Response Manager

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**Cases** ▾ **Reports** ▾ **Profile** ▾

**Draft Cycle Report for Data Manager Code - 555**

Current Cycles

2015 3-year official

Select cycle for the reports

Select One ▾

Select One

2015 3-year draft

**SUBMIT**

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Figure 112 Draft cycle report page, DM user

From this page, you can get reports for cases from any of the draft cycles. You may select the cycle from the drop-down list. You can only get a report for one cohort year at a time. Currently only IDCs are processed during the draft cycle so the data for the reports will only come from IDCs.

dm555.test555.fsa / 555 ( U.S. Department of Education, Default Prevention and Mgt ) - DM Response Manager [HELP](#) [LOG OUT](#)

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**eCDR Appeals System**

**Cases** ▾ **Reports** ▾ **Profile** ▾

**Draft Cycle Report for Data Manager Code - 555**

Current Cycles

2015 3-year official

Select cycle for the reports

2015 3-year draft ▾

**SUBMIT**

**Changes to Loan Records**

OPEID	SCHOOL NAME	BORROWER SSN	BORROWER NAME	LOAN TYPE	LOAN IDENTIFIER	LOAN GUARANTY DATE	AMOUNT	LAST DAY OF ATTENDANCE/LESS THAN HALF-TIME DATE (ADJUSTED)	DATE ENTERED REPAYMENT (ORIGINAL)	DATE ENTERED REPAYMENT (UPDATED)
880012	Geographic Center University	000000035	Jxxxxx P. Bxxxxxx	D1	00010000000350001	05/06/2009	\$3,500.00		02/15/2010	06/17/2014

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Figure 113 Draft cycle report, cohort year selected, DM user

### *Changes to Loan Records (draft cycle report)*

This report lists all the loans from the IDCs that you have agreed needed to be corrected in the LRDR and what the updated information should be.

## Official Cycle (for DM)

dm555.test555.fsa / 555 ( U.S. Department of Education, Default Prevention and Mgt ) - DM Response Manager

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**Cases** ▾ **Reports** ▾ **Profile** ▾

Official Cycle Report for Data Manager Code - 555

Current Cycles

2015 3-year official

Select cycle for the reports

Select One ▾  
Select One  
2015 3-year official

SUBMIT

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*Figure 114 Official cycle report page, DM user*

From this page, you can get reports for cases from any of the official cycles. You may select the cycle from the drop-down list. You can generate a report for only one cohort year at a time. The report data will come from the NDA and LSA cases from the selected official cycle.

[Cases](#) ▾ [Reports](#) ▾ [Profile](#) ▾

Official Cycle Report for Data Manager Code - 555


Current Cycles

2015 3-year official

Select cycle for the reports 

2015 3-year official ▾

SUBMIT

Changes to Loan Records 

OPEID	SCHOOL NAME	BORROWER SSN	BORROWER NAME	LOAN TYPE	LOAN GUARANTY DATE	AMOUNT	LAST DAY OF ATTENDANCE/LESS THAN HALF-TIME DATE (ADJUSTED)	DATE ENTERED REPAYMENT (UPDATED)	DEFAULT DATE (ADJUSTED)
880012	Geographic Center University	000000035	Jxxxxx P. Bxxxxxx	D1	05/06/2009	\$3,500.00		06/17/2014	
880014	Geographic Center University	000000026	Mxxxxxxx J. Kxxxxxx	SF	04/24/2009	\$1,750.00		05/18/2017	
880014	Geographic Center University	000000026	Mxxxxxxx J. Kxxxxxx	SU	04/24/2009	\$2,333.00		05/18/2017	
880014	Geographic Center University	000000026	Mxxxxxxx J. Kxxxxxx	SF	06/12/2008	\$3,500.00		05/18/2017	
880014	Geographic Center University	000000026	Mxxxxxxx J. Kxxxxxx	SU	06/12/2008	\$6,000.00		05/18/2017	

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Figure 115 Official cycle report page, cohort year selected, DM user

### Changes to Loan Records (official cycle report)

This report lists all the loans from the NDAs that you have agreed needed to be corrected in the LRDR and what the updated information should be.

## OPD/FSA

Operations Performance Division (OPD) personnel are Federal Student Aid (FSA) personnel and the terms OPD and FSA will be used interchangeably throughout the document.

The application has multiple pages for different functions, but they all have similar elements. Please refer to the All Users **NAVIGATION** section for descriptions of these common elements.

## Navigation

### *FSA roles*

Your account will be assigned one of three possible eCDR Appeals roles:

- **FSA Caseworker:** May update adjustment and case information.
- **FSA Case Manager:** Has the same abilities as the FSA Caseworker, plus the ability to assign other OPD personnel to a case and submit a final decision.
- .
- **FSA Admin:** Has the same abilities as the FSA Case Manager, plus the ability to manage (create, update, close) cycles

## Profiles

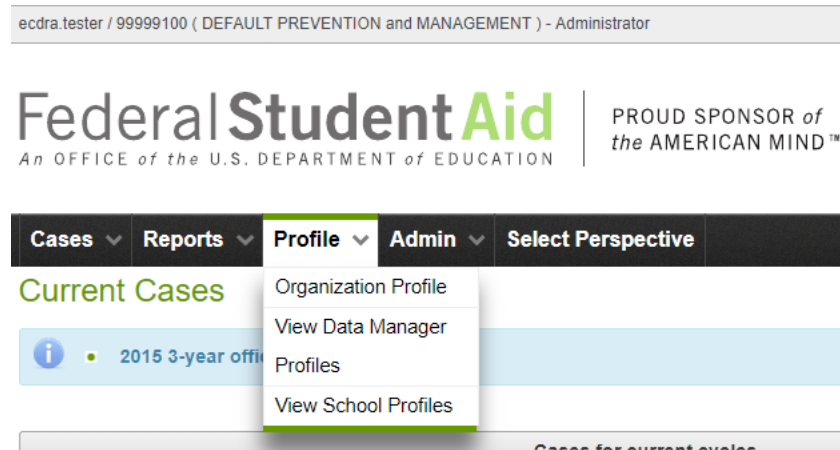


Figure 116 Profile menu options, FSA user

## Organization Profile

ecdra.test@99999100 ( DEFAULT PREVENTION and MANAGEMENT ) - Administrator [HELP](#) [LOG OUT](#)

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**Cases** ▾ **Reports** ▾ **Profile** ▾ **Admin** ▾ **Select Perspective**

Edit profile

99999100:DEFAULT PREVENTION and MANAGEMENT



- Please verify and update the following information.
- Fields marked with (\*) are required

**Organization Information**

Organization Name: \*

830 First Street, NE

Address: \*

WASHINGTON

City: \*

DC - District of Columbia

State:

20202

Zip:

USA

Country:

ecdra.admin@ed.gov

Organization Email: \*

ecdra.other.admin@ed.gov

Alternate Email:

202-555-1212

Phone Number: \*

Alternate Phone:

Figure 117 FSA organization contact information

The organization profile page allows you to edit the organization's contact information.

## eCDR Appeals UDA User Guide

**User Contact Information**

Last Name: \*

Me

First Name: \*

Just

Email\*: \*

just.me@ed.gov

Phone: \*

202-377-3196

SAVE

CANCEL

**Other User Contacts**

NAME	EMAIL	PHONE
<a href="#">Jasons.Timo</a>	jas@test.test	202-333-2222
<a href="#">casemanager.FSA</a>	fsa.casemanager@ed.test	202 377 4444
<a href="#">Caseworker.FSA</a>	fsa.caseworker@ed.est	202-377-5555

**NEW CONTACT**

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*Figure 118 FSA profile, user contact information*

It also allows you to edit your contact information. If you have a case manager or admin role, you can also add, edit, or delete, other contacts for FSA.

## View Data Manager Profiles

ecdra.test / 99999100 ( DEFAULT PREVENTION and MANAGEMENT ) - Administrator

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Cases ▾Reports ▾Profile ▾Admin ▾Select Perspective

### View Profile

99999100:DEFAULT PREVENTION and MANAGEMENT

Please select the profile you wish to view.

Valid Data Manager Profiles

RESET FILTERS

Showing 10 ▾ records (1 - 10 of 92) 1 2 3 4 5 6 7 8 9 10 >> >>1

ORGANIZATION NAME ▾	ORGANIZATION CODE - GA NUMBER ▾
<a href="#">U.S. Department of Education_Direct Loan Servicing Center</a>	100
<a href="#">U.S. Department of Education_Direct Loan Servicing Center</a>	101
<a href="#">Student Help In Education Loan Disbursement</a>	111
<a href="#">CASSIOPEIA ALPHA STUDENT ASSISTANCE</a>	222
<a href="#">SYLVESTER STUDENTS SERVICE</a>	321
<a href="#">BETELGEUSE LOAN AND AID FOR HIGHER-EDUCATION</a>	333
<a href="#">POLARIS ACCESS NETWORK</a>	444
<a href="#">Missouri Department of Higher Education</a>	500
<a href="#">Education Services of America, Inc.</a>	501
<a href="#">CornerStone Education Loan Services</a>	502

Showing 10 ▾ records (1 - 10 of 92) 1 2 3 4 5 6 7 8 9 10 >> >>1

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Figure 119 Data Manager list

If you have an admin role, you can look up the profiles, i.e. of Data Managers in the system. This includes the points-of-contact for the Data Manager.

**Cases** ▾ **Reports** ▾ **Profile** ▾ **Admin** ▾ **Select Perspective**

## Profile

99999100:DEFAULT PREVENTION and MANAGEMENT

### Organization Information

Organization Name: BETELGEUSE LOAN AND AID FOR HIGHER-EDUCATION  
Address: 333 WASHINGTON ST  
City: INDIANAPOLIS  
State: IN  
Zip: 46256  
Country:  
Email: fernando.felixberto+dm333@gmail.com  
Alternate Email:  
Phone Number: 800-806-1256  
Alternate Phone:

### User Contacts

LAST NAME	FIRST NAME	EMAIL	PHONE
No User Contacts Available			

Figure 120 Data Manager profile page



## View School Profiles

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Cases ▾ Reports ▾ Profile ▾ Admin ▾ Select Perspective ▾

### View Profile

99999100:DEFAULT PREVENTION and MANAGEMENT

Please select the profile you wish to view.

Valid School Profiles

RESET FILTERS

Showing 10 records (1 - 10 of 16787) 1 2 3 4 5 6 7 8 9 10 >> >1

ORGANIZATION NAME ↕	ORGANIZATION CODE - OPEID ↕
<a href="#">Air University</a>	001001
<a href="#">Alabama Agricultural &amp; Mechanical University</a>	001002
<a href="#">Faulkner University</a>	001003
<a href="#">University of Montevallo</a>	001004
<a href="#">Alabama State University</a>	001005
<a href="#">Alabama State University Mobile Center</a>	001006
<a href="#">Central Alabama Community College</a>	001007
<a href="#">Athens State University</a>	001008
<a href="#">Auburn University</a>	001009
<a href="#">Birmingham Baptist College</a>	001010

Showing 10 records (1 - 10 of 16787) 1 2 3 4 5 6 7 8 9 10 >> >1

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Figure 121 School list

If you have an admin role, you can look up the profiles for schools in the system. This includes points-of-contact for the school.

# eCDR Appeals UDA User Guide

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Cases ▾ Reports ▾ Profile ▾ Admin ▾ Select Perspective ▾

Profile

99999100:DEFAULT PREVENTION and MANAGEMENT

Organization Information

Organization Name:

Sturm Und Drang College of Diplomacy

Address:

4 UNDER THE SEA

City:

SAN DIEGO

State:

CA

Zip:

92128

Country:

Email:

fernando.felixberto+sch999987@gmail.com

Alternate Email:

mehedi.hasan@ed.gov

Phone Number:

585-555-1212

Alternate Phone:

User Contacts

LAST NAME	FIRST NAME	EMAIL	PHONE
No User Contacts Available			

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Figure 122 School profile page

## Perspectives

ecdra.test / 99999100 ( DEFAULT PREVENTION and MANAGEMENT ) - Administrator

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Cases ▾ Reports ▾ Profile ▾ Admin ▾ Select Perspective ▾

Select Perspective

Select One ▾

Select One

785 - DM Response Manager

583 - DM Response Manager

Administrator

Figure 123 Select perspective page, FSA user

Some FSA users may also be Data Managers. If so, they will have different roles available in the Select Perspective page.

## Menus

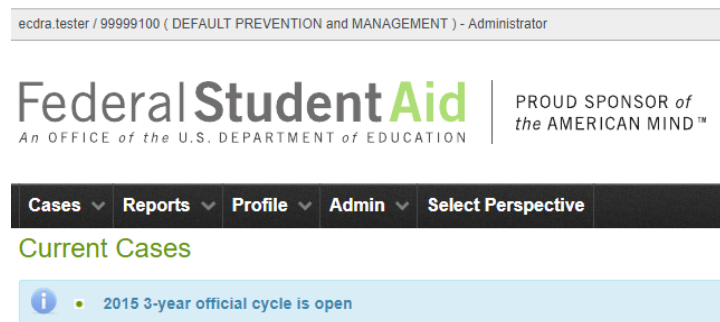


Figure 124 Menu bar, FSA user

The menu options shown are those available for FSA users. The down arrow to the right of the option name indicates that there is an associated sub-menu. Selecting a menu, or sub-menu, option will open a page. The pages will be described in separate sections in this document.

Menu and sub-menu options for school users:

- Cases (see CASE LISTS)
  - Current cases (see CURRENT CASES)
  - Past cases (see PAST CASES)
- Reports (see REPORTS FOR FSA)
  - Current Status (see CURRENT STATUS (FOR FSA))
  - Draft Cycle (see DRAFT CYCLE (FOR FSA))
  - Official Cycle (see OFFICIAL CYCLE (FOR FSA))
  - PEPS (see PEPS)
  - Administrative (see ADMINISTRATIVE)
- Profile (see PROFILES)
  - Organization Profile (see ORGANIZATION PROFILE)
  - View Data Manager Profiles (see VIEW DATA MANAGER PROFILES) – only available to Admin
  - View School Profiles (see VIEW SCHOOL PROFILES) – only available to Admin
- Admin
  - Manage LRDR Requests (see MANAGE LRDR REQUESTS)
  - Manage Due Dates (see MANAGE DUE DATES)
  - Upload CDR (see UPLOAD CDR)
  - Upload Sanctioned List (see UPLOAD SANCTIONED LIST)
  - Manage Cycles (see MANAGE CYCLES) – only available to Admin
  - Manage LRDR Scheduler (see MANAGE LRDR SCHEDULER) – only available to Admin
- Select Perspective (see PERSPECTIVES) – only available for FSA users who also act as Data Managers

## Loading requisite files

### Loan Records Detail Report (LRDR)

#### *Generating official cycle LRDR requests*

Before the official phase of the cohort year, Federal Student Aid OPD must ensure that the LRDRs for all the schools that have submitted an Incorrect Data Challenge (IDC) have been loaded in preparation for the official cycle. This is necessary for the system to be able to determine if a school will be eligible to submit a UDA.

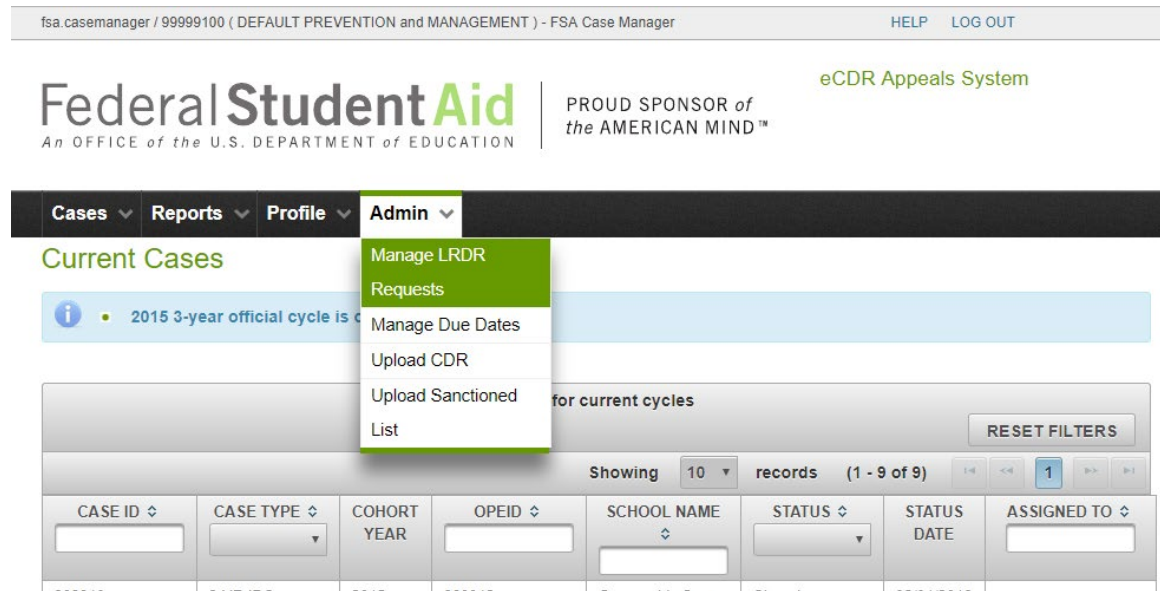


Figure 125 Manage LRDR requests menu option, FSA user

The eCDR Appeals system has a function to generate a list of necessary LRDR requests for the official cycle based on submitted draft cycle IDCs. OPD users may access this function by logging in to eCDR Appeals, then selecting Manage LRDR Extracts from the Admin menu. This will load the LRDR Request List page.

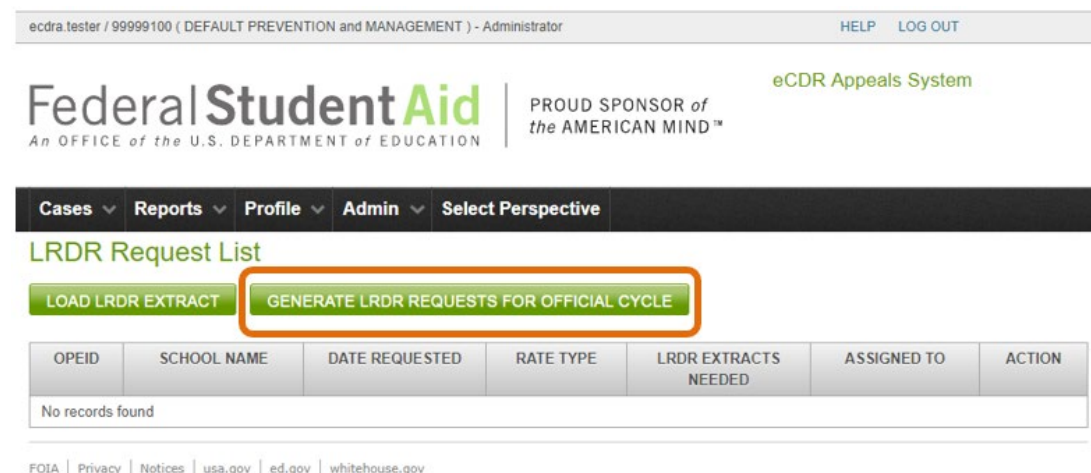


Figure 126 Generate LRDR requests button

On the LRDR Request List page, click the **GENERATE LRDR REQUESTS FOR OFFICIAL CYCLE** button. This will generate LRDR requests for all the schools that have submitted an IDC during the draft cycle.

### Managing LRDR extracts

Normally, the system will automatically order and load LRDRs for open LRDR requests and FSA users would not have to load the LRDR extracts manually. There may be circumstances when the automated system is not able to complete the LRDR request in which case the files will have to be loaded manually. The following sections will describe how to do that.

### Viewing the LRDR request list

fsa.casemanager / 99999100 ( DEFAULT PREVENTION MANAGEMENT ) - FSA Case Manager

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Cases ▾

Reports ▾

Profile ▾

Admin ▾

LRDR Request List

LOAD LRDR EXTRACT

GENERATE LRDR REQUESTS FOR OFFICIAL CYCLE

OPEID	SCHOOL NAME	DATE REQUESTED	RATE TYPE	LRDR EXTRACTS NEEDED	ASSIGNED TO	ACTION
<a href="#">880010</a>	Geographic Center University 11	02/05/2018	3-year	2015 Official	fsa.caseworker	<div>SELF-ASSIGN</div>
<a href="#">880013</a>	Geographic Center University 14		3-year	2015 Official		<div>SELF-ASSIGN</div>
<a href="#">880020</a>	Geographic Center University 21	12/14/2018	3-year	2015 Official		<div>SELF-ASSIGN</div>
<a href="#">999989</a>	Martian Rover Institute of Technology		3-year	2015 Official		<div>SELF-ASSIGN</div>

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Figure 127 Open LRDR requests

On the LRDR Request List page, a list of outstanding LRDR requests is displayed. The list of requests is sorted by OPEID. The LRDR extracts needed for each OPEID are identified by cohort year and cycle, i.e. draft or official.

### Assigning a LRDR request

Clicking on the **SELF-ASSIGN** button assigns the LRDR request to you and your name will appear in the “Assigned To” column for that request. Opening the LRDR request and loading a file will also automatically assign the request to you.

LRDR request assignment used to be necessary when there were hundreds of requests that needed to be completed. Assigning specific requests to different people ensured that they did not duplicate work by ordering and loading files for the same schools. With the implementation of the automated system, FSA users seldom need to load the files manually and assigning requests is almost never needed.

### *Uploading a LRDR extract*

To upload files for a school, click on the OPEID of the LRDR request. This opens the Upload LRDR Extract page.

fsa.casemanager / 99999100 ( DEFAULT PREVENTION and MANAGEMENT ) - FSA Case Manager [HELP](#) [LOG OUT](#)

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eCDR Appeals System

**Cases** ▾ **Reports** ▾ **Profile** ▾ **Admin** ▾

## Upload LRDR Extract

880014:Geographic Center University

**LRDR Request Processing Actions**

LRDR request needs to be completed

**LRDR Request Information and Upload**

Please upload one of the following LRDR extracts. If no LRDR extract exists for a particular cohort year, you may remove the year from the list by marking it as Not Available

880014 2015 Official 3 year	
880014 2015 Draft 3 year	
880014 2014 Official 3 year	<a href="#">MARK AS NOT AVAILABLE</a>
880014 2013 Official 3 year	<a href="#">MARK AS NOT AVAILABLE</a>

Select LRDR Extract File [Choose File](#) No file chosen

[SAVE](#) [CANCEL](#)

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*Figure 128 Select LRDR extract file to upload*

The files that need to be uploaded are identified by the OPEID, cohort year, and cycle type. To select the file to upload, click **CHOOSE FILE** or **BROWSE** (depending on which browser is being used, e.g. Chrome, IE, Edge, etc.) button.

## eCDR Appeals UDA User Guide

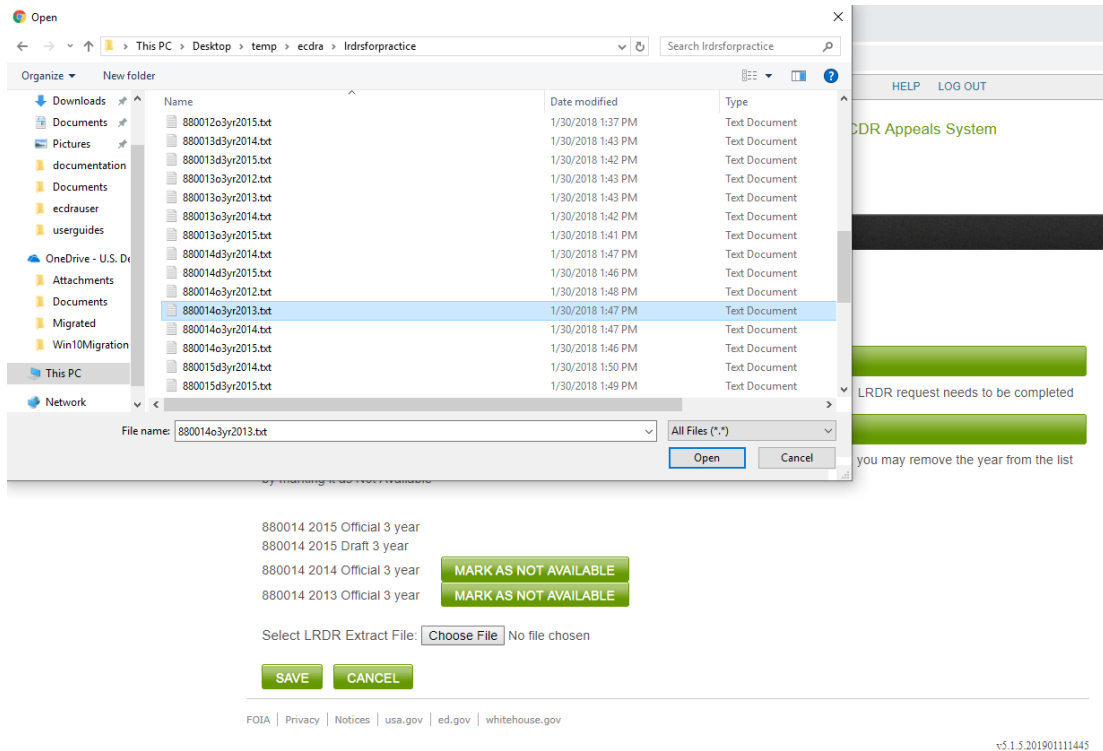


Figure 129 Browse for file to upload

This opens a system file browser window. Navigate to the file you want to upload and click **OPEN**.

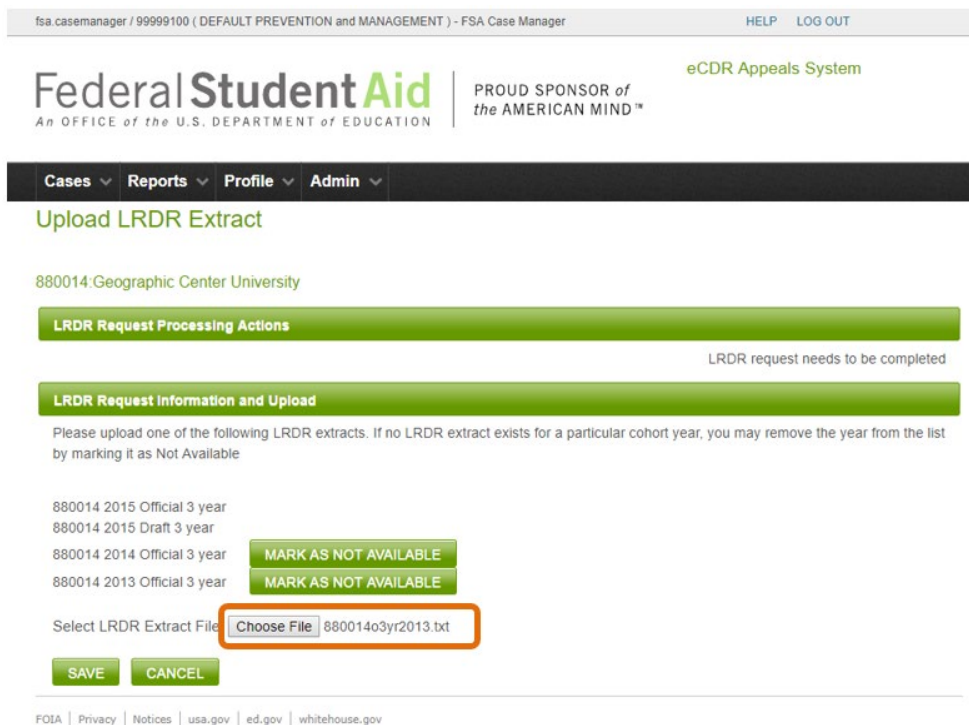


Figure 130 LRDR extract file selected



The selected file's name will be displayed to the right of the **CHOOSE FILE** button. Click **SAVE** to upload it. Upload normally should take no more than a few seconds but unusually large files, 40MB or larger, may take a few minutes. Upon a successful upload, a confirmation message will be displayed at the top of the page.

fsa.caseworker / 99999100 ( DEFAULT PREVENTION MANAGEMENT ) - FSA Case Worker

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eCDR Appeals System

Cases ▾Reports ▾Profile ▾Admin ▾

Upload LRDR Extract

✕

C:\Users\Fernando.Felixberto\Desktop\templecdra\lrdrsforpractice\880010d3yr2015bad.txt failed to load. May be incorrect file or corrupted.

880010:Geographic Center University 11

LRDR Request Processing Actions

LRDR request needs to be completed

LRDR Request Information and Upload

Please upload one of the following LRDR extracts. If no LRDR extract exists for a particular cohort year, you may remove the year from the list by marking it as Not Available

880010 2015 Official 3 year

Select LRDR Extract File:  Browse...

SAVECANCEL

Figure 131 LRDR file failed to load

If there was a problem with the LRDR file, an error message will be displayed at the top of the page.

#### *If a LRDR extract is not available*

It is possible for a school to not have LRDRs for earlier years. For example, if it is a new school and has not been in operation long enough to get more than one cohort year's LRDR. In such cases, click the **NOT AVAILABLE** button for the cohort year that is not available. This marks the LRDR as not needed for the request. Note that the LRDR(s) for the current cohort year cannot be marked as not available. A school without a LRDR for the current cohort year will not have a default rate and therefore will not have anything to challenge or appeal.



### Marking a request as complete

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**Upload LRDR Extract**

**i** • File 880014o3yr2015.txt was uploaded successfully

880014:Geographic Center University

**LRDR Request Processing Actions**

**MARK LRDR REQUEST COMPLETE**

**LRDR Request Information and Upload**

All the LRDR extracts are loaded (or are unavailable). Mark the request as complete to allow school to continue with the cases.

Select LRDR Extract File:  No file chosen

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Figure 132 Mark LRDR request as complete

Once all the LRDRs for a school have been loaded into a system, or identified as not available, then a **MARK LRDR REQUEST COMPLETE** button will become available in the LRDR Request Processing Actions section. Clicking this button will close the LRDR request and set the case to “LRDR Loaded” status. The LRDR request will be removed from the list and the school will be allowed to prepare their case. If the school’s countdown to the case submission deadline was suspended while awaiting the LRDR, the countdown will automatically resume. The school will receive an automatic email notification informing them that their LRDRs have been loaded.

### List of schools under sanction

From the main menu, select System Administration. This opens a sub-menu and from this, select Manage Sanctioned List to open the Sanctioned List Upload page.

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Cases ▾ Reports ▾ Profile ▾ Admin ▾ Select Perspective ▾

### Sanctioned List Upload

i

- There are no schools listed as under sanction for any of the current cohort years. It is possible that the current list has not been uploaded.

Sanctioned List Upload

NOT AVAILABLE

Select schools under sanction file:  No file chosen

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Figure 133 Sanctioned list upload page, sanctioned list not loaded

There is a **NOT AVAILABLE** button in the page that you will probably rarely, if ever, use. You can use it if there are no schools under sanction for the current cohort year. If you click on that button, it will be the same as uploading an empty sanctioned list file. It also means that no school will be able to submit an LSA for the cohort year.

In most cases, you will select the file to upload by clicking on the **CHOOSE FILE** (or **BROWSE**, depending on the browser) button to open a dialog box for selecting the file. Once the file is selected, click **SUBMIT**. This will upload the file. When it is done, the page will refresh and the message will indicate that the sanctioned list for the cohort year has been loaded.

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Cases ▾ Reports ▾ Profile ▾ Admin ▾ Select Perspective ▾

### Sanctioned List Upload

i

- The list of schools under sanction for the current cohort year (2015) is loaded in the database.

Sanctioned List Upload

Select schools under sanction file:  No file chosen

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Figure 134 Sanctioned list upload page, sanctioned list loaded

The status of LSA cases already initiated will be updated to reflect that this file is now available. If the necessary LRDR(s) are also present, then a school will be notified by email, and can prepare its request for servicing records.

## Cohort Default Rates (CDR)

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**CDR Upload**

**i** • The cohort default rate for 2016 3-year official is loaded in the database.

**Cohort Default Rate Upload**

Select Cohort Default Rate data file:  No file chosen

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v5.1.5.201901111445

*Figure 135 CDR upload page*

Select the CDR Upload option from the Admin menu. This opens the CDR Upload page. Click on the **CHOOSE FILE** or **BROWSE** button (depending on what Internet browser you are using) to open the system file browser. Navigate to the CDR file and click Open. The file name should now be selected. Click on the **SUBMIT** button to upload the file.

The default rates for the schools need to be uploaded before FSA reviewers can recompute the revised rates, if any for the appeals. The data comes from PEPS and must be formatted as an Excel file before uploading to eCDRA.

## Documents

Most of the information that needs to be reviewed for the LSA are contained in documents that are created outside eCDR Appeals. The documents that FSA will provide include the Decision Letter for the overall case and a single Enclosure for each cohort year in the case. These documents should be finalized in PDF format prior to uploading. Work papers that support the decision letter or its enclosures may be uploaded for each cohort year in the case. These are typically in their native format (such as a spreadsheet).

**Attached Documents**

**Confidential Work Papers (for FSA Use Only)**  
**ATTACH FILE**

FILE NAME	FILE DESCRIPTION	ACTION
<a href="#">JohnDoeLoanRecords.pdf</a>	Additional information about loans	<b>REMOVE</b>

**Decision Letter Enclosures**

FILE NAME	FILE DESCRIPTION	ACTION
<a href="#">DecisionLetterEnclosure.pdf</a>	2015 Enclosure	<b>REMOVE</b>

**Borrower Information Provided by School (School Spreadsheet)**

FILE NAME	FILE DESCRIPTION
<a href="#">badfile.txt</a>	i'm bad, i'm bad

**Servicing records and documents from Data Manager 555**

FILE NAME	FILE DESCRIPTION
<a href="#">badfile.txt</a>	we bad

**Servicing records and documents from Data Manager 777**

FILE NAME	FILE DESCRIPTION
<a href="#">test_data_lrdrs.xlsx</a>	who's bad?

Figure 136 Attached documents section of the LSAppeal page

The files from the school and the data managers will also be available from the LSAppeal page so that all the related documents can be reviewed from just one page.

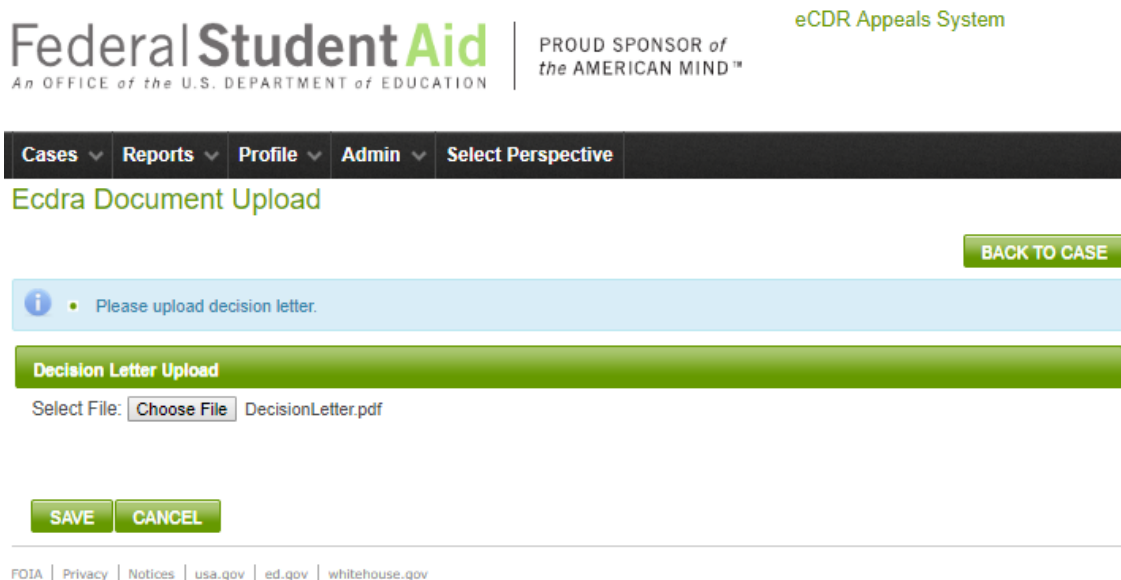
## Decision Letter

*Attach decision letter*



*Figure 137 Attach decision letter case action, FSA user*

The Decision Letter is uploaded from the Case Details Page. Click on the **ATTACH DECISION LETTER** button located in the Case Actions section of the page.



*Figure 138 Document upload page for decision letter*

Select the Decision Letter by browsing your computer. Click **SAVE** to upload the Decision Letter or **CANCEL** to return to the Case Details page without uploading any file.

Once you save the Decision Letter, it displays on the Case Details page, under Case Actions. Until the case is closed, there is a **REMOVE** button next to the saved letter, enabling you to remove the Decision Letter if necessary, in order to replace it (see Figure 140).

## Case Details

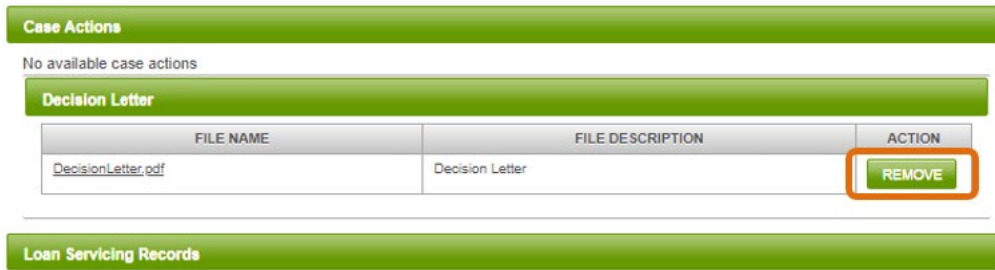
880013:Geographic Center University



*Figure 139 Decision letter link, case closed*

Once the case is closed, the Decision Letter will show at the top of the Case Details page, above the Case Processing Actions section of the page.

### Remove decision letter



**Case Actions**

No available case actions

**Decision Letter**

FILE NAME	FILE DESCRIPTION	ACTION
DecisionLetter.pdf	Decision Letter	<b>REMOVE</b>

**Loan Servicing Records**

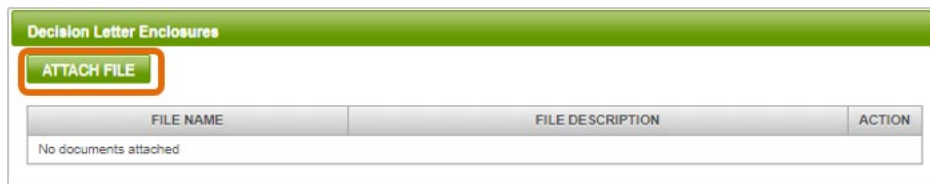
Figure 140 Remove button for decision letter

Click **REMOVE** button to delete the attached decision letter from the case page.

## Decision Letter Enclosures

### Upload decision letter enclosure

The Enclosure to the Decision Letter is uploaded from the applicable LSAppeal Details page. You will need one enclosure for each cohort year appealed in the case.



**Decision Letter Enclosures**

**ATTACH FILE**

FILE NAME	FILE DESCRIPTION	ACTION
No documents attached		

Figure 141 Attach file button for decision letter enclosure

Click the **ATTACH FILE** button in the Decision Letter Enclosures section.



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**Ecdra Document Upload**

**BACK TO LSAPPEAL**

**Please upload enclosure file for decision letter.**

**Attach Decision Letter Enclosure Supporting Document**

Select File: **Choose File** DecisionLett...nclosure.pdf

**SAVE** **CANCEL**

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Figure 142 Document upload page for decision letter enclosure

This opens the document upload page for the Decision Letter Enclosure. Select the correct enclosure document by browsing your computer. Click **SAVE** to upload the Enclosure document or **CANCEL** to return to the LSAppeal Details page without uploading any file.

Once you save the Enclosure to the decision letter, it displays on the LSAppeal Details page, under Attached Documents. Until the case is closed, there is a **REMOVE** button next to the saved enclosure, enabling you to remove the enclosure if necessary, in order to replace it.

## Case Details

880013:Geographic Center University



Figure 143 Decision letter enclosure link, case closed

Each enclosure uploaded also displays at the top of the Case Details page, above the Case Processing Actions section of the page, as shown below.

### Remove decision letter enclosure



Figure 144 Remove button for decision letter enclosure

Click the **REMOVE** button to delete the file from the LSAppeal page.

## Work papers

### Upload work paper

The FSA Caseworker follows OPD practices for the inclusion and format of work papers. Work papers apply to a single cohort year in the case. Repeat the steps separately for each cohort year in a multiyear case.

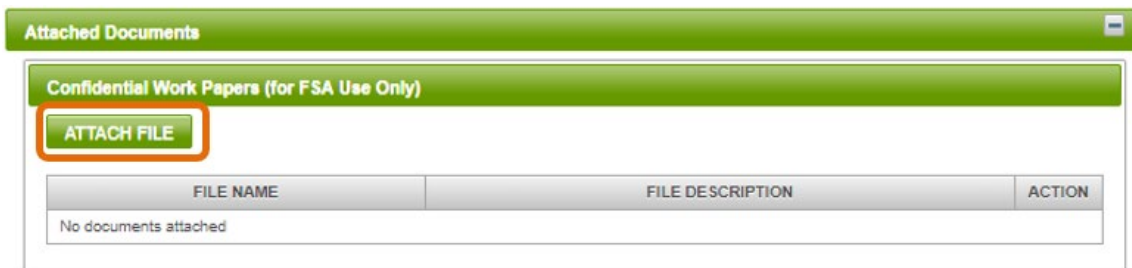


Figure 145 Attach file button for FSA work papers

Access the LSAppeal Details page for the cohort year. Click the **ATTACH FILE** button in the Confidential Work Papers section of the LSAppeal page.

The screenshot shows the 'FSA Confidential Work Papers Page' within the 'eCDR Appeals System'. At the top, there is a navigation bar with links: Cases, Reports, Profile, Admin, and Select Perspective. Below this is a green header with the 'Federal Student Aid' logo and the text 'An OFFICE of the U.S. DEPARTMENT of EDUCATION' and 'PROUD SPONSOR of the AMERICAN MIND™'. A green button labeled 'BACK TO LSAPPEAL' is in the top right. A light blue message box states: 'Please upload confidential work papers for appeal.' The main section has a green header 'FSA Confidential Work Papers Page'. Below it, 'Select File:' is followed by a 'Choose File' button and the filename 'JohnDoeLoanRecords.pdf'. 'File Description:' is followed by a text box containing 'Additional information about loans'. At the bottom are 'SAVE' and 'CANCEL' buttons. A footer contains links: FOIA, Privacy, Notices, usa.gov, ed.gov, and whitehouse.gov.

Figure 146 Document upload page for FSA work papers

This opens the FSA Confidential Work Papers Page. Select the correct work paper document by browsing your computer. Click **SAVE** to upload the work paper document or **CANCEL** to return to the LSAppeal Details page without uploading any file.

Once you save the work paper, it displays on the LSAppeal Details page, under Attached Documents. You may repeat the above steps to attach more work papers for a given cohort year. Until the case is closed, there is a **REMOVE** button next to each saved work paper, enabling you to remove it if necessary.

#### Delete work paper

The screenshot shows the 'Attached Documents' section. It has a green header 'Attached Documents' with a minus icon. Below is a green box labeled 'Confidential Work Papers (for FSA Use Only)' containing an 'ATTACH FILE' button. Below this is a table with three columns: FILE NAME, FILE DESCRIPTION, and ACTION. The first row contains the filename 'JohnDoeLoanRecords.pdf', the description 'Additional information about loans', and a 'REMOVE' button which is highlighted with an orange border.

FILE NAME	FILE DESCRIPTION	ACTION
JohnDoeLoanRecords.pdf	Additional information about loans	<b>REMOVE</b>

Figure 147 Remove button for FSA work paper

Click the **REMOVE** button to delete the attached file from the LSAppeal page.



## Case lists

### Current cases

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Current Cases

2015 3-year official cycle is open

Cases for current cycles

Showing 10 records (1 - 9 of 9) [RESET FILTERS](#)

CASE ID ▾	CASE TYPE ▾	COHORT YEAR	OPEID ▾	SCHOOL NAME ▾	STATUS ▾	STATUS DATE	ASSIGNED TO ▾
<a href="#">303910</a>	3-YR IDC	2015	880012	Geographic Center University	Closed	02/01/2018	
<a href="#">303909</a>	3-YR IDC	2015	880011	Geographic Center University	Closed	02/01/2018	
<a href="#">303915</a>	3-YR UDA	2015	880012	Geographic Center University	Closed	02/02/2018	
<a href="#">303913</a>	3-YR NDA	2015	880012	Geographic Center University	Closed	02/01/2018	
<a href="#">303919</a>	3-YR NDA	2015	880014	Geographic Center University	Awaiting LRDR	02/02/2018	
<a href="#">303911</a>	3-YR NDA	2015	880011	Geographic Center University	Closed	02/01/2018	
<a href="#">303916</a>	3-YR LSA	2015	880013	Geographic Center University	Caseworker review	02/01/2018	<div>ecdra.testar ▾ <a href="#">ASSIGN</a></div>
<a href="#">303912</a>	3-YR LSA	2015	880011	Geographic Center University	Being prepared	02/01/2018	

Figure 148 Current cases page, FSA user

The Current Cases page lists all current cases in the system in a table. Cases are considered current if they belong to an open cycle. To open an LSA to review, click the case ID number of the desired case. This will load the Case Details page. A case must first be assigned to you before you can review it. If a case is not assigned to anybody, you may view all the case details, but everything will be read-only.

Cases for current cycles					
RESET FILTERS					
Showing 10 records (1 - 10 of 15) 1 2					
T	OPEID	SCHOOL NAME	STATUS	STATUS DATE	ASSIGNED TO
	880012	Geographic Center University 13	Caseworker review	12/03/2018	fsa.caseworker
	111111	UNIVERSITY OF IO	Closed	11/15/2018	
	880024	Geographic Center University 25	Perfected/Available for FSA review	11/19/2018	SELF-ASSIGN
	880023	Geographic Center	Closed	11/05/2018	

Figure 149 Self-assign button for FSA case worker

If you have the FSA caseworker role, you will be able to self-assign a case that has not yet been assigned to anybody. If a case is already assigned to someone else, you will not be able to re-assign it to yourself.

Cases for current cycles					
RESET FILTERS					
Showing 25 records (1 - 15 of 15) 1					
OPEID	SCHOOL NAME	STATUS	STATUS DATE	ASSIGNED TO	
880012	Geographic Center University 13	Caseworker review	12/03/2018	fsa.caseworker	ASSIGN
111111	UNIVERSITY OF IO	Closed	11/15/2018		
880024	Geographic Center University 25	Perfected/Available for FSA review	11/19/2018	Not assigned	
880023	Geographic Center University 24	Closed	11/05/2018	fsa.caseworker fsa.casemanager	

Figure 150 FSA users drop-down and assign button for FSA case manager or admin

If you have the FSA case manager or FSA admin role, you will be able to assign a case to yourself or to somebody else. You will also be able to re-assign a previously assigned case.

## Past cases

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Past Cases

Cases for past cycles

RESET FILTERS

Showing 10 ▾ records (1 - 10 of 107)

12345678910

CASE ID ▾	CASE TYPE ▾	COHORT YEAR ▾	OPEID ▾	SCHOOL NAME ▾	STATUS ▾	CLOSE DATE
<a href="#">300350</a>	2-YR IDC	2011	880002	Geographic Center University 3	Caseworker re-review	
<a href="#">303542</a>	3-YR IDC	2012	001312	University of California, Berkeley	Perfected/Available for FSA review	
<a href="#">303483</a>	3-YR IDC	2011	880044	Geographic Center University 45	Closed	
<a href="#">303484</a>	3-YR IDC	2011	880042	Geographic Center University 43	Available for case manager review	
<a href="#">303485</a>	3-YR IDC	2011	880041	Geographic Center University 42	Case manager review	
<a href="#">303486</a>	3-YR IDC	2011	880040	Geographic Center University 41	Available for case manager review	

Figure 151 Past cases page, FSA user

The past cases page lists all the cases for cycles that have been closed.

## Case

### Case information

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Cases

Reports

Profile

Admin

Select Perspective

Case Details

880013:Geographic Center University

Workflow Actions

COMPLETE CASEWORKER REVIEW

Case Information

Case ID:

303916

Cohort Year:

2015

Case Type:

3-YR LSA

Status:

Caseworker review

Status Date:

02/01/2018

Certification

•

badfile.txt

it's all bad

Comment:

SAVE

CANCEL

Comments

Case Actions

Figure 152 Case details page, FSA user view

The OPEID and name of the school that submitted the case is displayed below the common message area. Below all these is the case Workflow Actions section, separated from the previously described elements by a green bar. This section is described in more detail in CASE WORKFLOW ACTIONS (FSA USER). Below the workflow actions section is the Case Information section which includes the basic information about the case (ID, status, etc), certification, and comments.

## eCDR Appeals UDA User Guide

Certification

• [badfile.txt](#) it's all bad

Comment:

SAVE

CANCEL

Comments

Case Actions

ATTACH DECISION LETTER

Loan Servicing Records

Show All

☒ Cohort Year 2015 Data Managers: 2 Defaulted Borrowers: 6 Defaulted Loans: 7

[badfile.txt](#)

Showing 10 records (1 - 2 of 2)

DM	YEAR	BORROWERS	LOANS	BORROWER SAMPLE SIZE	SAMPLED LOANS	SAMPLING METHOD	STATUS
<a href="#">555</a>	2015	4	4				In caseworker review
<a href="#">777</a>	2015	2	3				In caseworker review

Showing 10 records (1 - 2 of 2)

SAVE

CANCEL

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Figure 153 Case details page, FSA user view (continued)

Below that is the Case Actions section (see CASE ACTIONS (FSA USER)) and below that is the Adjustments section. This contains the table where the adjustments that the schools requested for the case are listed.

## Case workflow actions (FSA user)

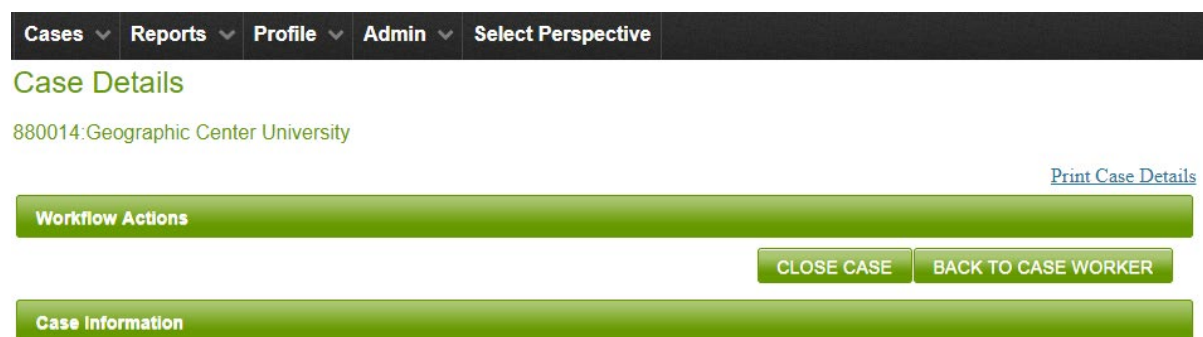


Figure 154 Case workflow actions section, FSA user

The possible workflow actions for an FSA user are listed below:

Complete caseworker review (see COMPLETE CASEWORKER REVIEW) – available during case worker review

Back to Case Worker (see RETURN TO CASEWORKER FOR RE-REVIEW) – available during case manager review

Close case (see CLOSE CASE) – available during case manager review

## Case actions (FSA user)



Figure 155 Case actions section, FSA user


The only case action in the LSA case for FSA user is:

Attach Decision Letter (see ATTACH DECISION LETTER)

## Perform caseworker review

After a school submits a perfected LSA, Federal Student Aid OPD will automatically be notified via email that the LSA is ready for review. The email will be sent to all the contacts in the FSA organization profile. The case will be listed in the current cases table with a status of “Perfected/Available for FSA Review”.

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Profile
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Current Cases

*i* • 2015 3-year official cycle is open

Cases for current cycles

Showing
10
records
(1 - 5 of 5)

CASE ID
CASE TYPE
COHORT YEAR
OPEID
SCHOOL NAME
STATUS
STATUS DATE
ASSIGNED TO

303928
3-YR LSA
2015
880121
Contiguous Geo Center University
Perfected/Available for FSA review
01/23/2018
SELF-ASSIGN

303929
3-YR LSA
2015
880014
Geographic Center University
Servicing records being prepared
01/23/2018

303914
3-YR LSA
2015
880012
Geographic Center University
Servicing records being prepared
02/01/2018

303916
3-YR LSA
2015
880013
Geographic Center University
Caseworker review
02/01/2018
eodra.testar

303912
3-YR LSA
2015
880011
Geographic Center University
Abandoned never submitted
06/25/2019

Showing
10
records
(1 - 5 of 5)

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Figure 156 Current cases with case ready for FSA review

To review an LSA the case must first be assigned to you, either self-assignment or a case manager or admin assigning the case to you. When the LSA is assigned for the first time, it automatically goes into 'Caseworker Review' status. Open the case by clicking on the case ID from the Current Cases page. Review the adjustments by clicking on the adjustment ID for each adjustment. See the Adjustment section for more details about the adjustment page. From the adjustment page, open the associated DM adjustments by clicking on their IDs. See the Data Manager (DM) adjustment section for details on how to review the DM adjustments.

During review you will be uploading a decision letter, enclosures, and other documents. There is one DECISION LETTER loaded for the case. You will also need to load DECISION LETTER ENCLOSURES for the decision letter, with one enclosure for each year, i.e. LSAppeal. You may also need to upload WORK PAPERS for each year.



## Complete caseworker review



Figure 157 Case workflow actions, caseworker review

Click the **COMPLETE CASEWORKER REVIEW** button. This updates the status of the case to “Available for Case Manager Review”.

## Perform case manager review

### Current Cases

• 2015 3-year official cycle is open

Cases for current cycles							
Showing 10 records (1 - 5 of 5)							
CASE ID	CASE TYPE	COHORT YEAR	OPEID	SCHOOL NAME	STATUS	STATUS DATE	ASSIGNED TO
<a href="#">303928</a>	3-YR LSA	2015	880121	Contiguous Geo Center University	Perfected/Available for FSA review	01/23/2018	Not assigned <a href="#">ASSIGN</a>
<a href="#">303929</a>	3-YR LSA	2015	880014	Geographic Center University	Servicing records being prepared	01/23/2018	
<a href="#">303914</a>	3-YR LSA	2015	880012	Geographic Center University	Servicing records being prepared	02/01/2018	
<a href="#">303916</a>	3-YR LSA	2015	880013	Geographic Center University	Available for case manager review	02/01/2018	Not assigned <a href="#">ASSIGN</a>
<a href="#">303912</a>	3-YR LSA	2015	880011	Geographic Center University	Abandoned never submitted	06/25/2019	

Showing 10 records (1 - 5 of 5)

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Figure 158 Current cases with case available for case manager review

The FSA Case Manager makes a determination regarding whether the information supports the decision and the case can be closed, or the case should be returned to the FSA Caseworker for additional work.

The FSA Case Manager can also, at this point, remove and/or replace the Decision Letter and the enclosure(s) for each year in the perfected case, as well as add to, or remove, the work papers for each year before closing the case or returning it to the caseworker.



## Return to caseworker for re-review



Figure 159 Back to case worker workflow action

To return the case to the FSA Caseworker for additional work, the FSA Case Manager clicks the **BACK TO CASE WORKER** button in the Workflow Actions section of the Case Details page. This will place the case back in “Caseworker review” status. The system automatically assigns the case to the FSA Caseworker who last worked on the case. The case can be re- assigned if desired.

## Close case



Figure 160 Close case workflow action

When the FSA Case Manager is satisfied that the case is complete and all pertinent material has been correctly uploaded, the FSA Case Manager clicks the **CLOSE CASE** button in the Workflow Actions section of the Case Details page. The action is final, and the system prompts the user to confirm the Close Case action.

### Case close confirmation

880013:Geographic Center University



- Please remember that once you have closed the case, you can no longer edit any information in it
- Please make sure that all the DM responses have been reviewed

Click OK to close the case, click Cancel to return to case details



Figure 161 Close case confirmation page

To confirm the case closure action, click **OK**. Or click **CANCEL** to return to the Case Details page without closing the case. Once you click **OK**, the case status changes to “Closed” and the system sends notifications to the School and to Data Managers who provided servicing records, indicating that the case is closed.

## Show perfected



Figure 162 Show Perfected button

Clicking the **SHOW PERFECTED** button puts the Loan Servicing Records section into the “Show Perfected” mode. In this mode:

- The Loan Servicing Records section shows only the year(s) selected by the schools for an appeal, and
- Only the data managers that provided servicing records are listed in the cohort year table.

The screenshot shows the "Loan Servicing Records" section in "Show Perfected" mode. It features a "Show All" button and two cohort year tables. Each table displays data for a specific year, including DM, YEAR, BORROWERS, LOANS, BORROWER SAMPLE SIZE, SAMPLED LOANS, SAMPLING METHOD, and STATUS.

**Cohort Year 2015** Data Managers: 3 Defaulted Borrowers: 452 Defaulted Loans: 1310

DM	YEAR	BORROWERS	LOANS	BORROWER SAMPLE SIZE	SAMPLED LOANS	SAMPLING METHOD	STATUS
<a href="#">555</a>	2015	125	304	95	233	Simple Random Sampling	Servicing Records Submitted
<a href="#">583</a>	2015	115	280	89	218	Systematic Sequential Sampling	Servicing Records Submitted
<a href="#">785</a>	2015	212	726	138	473	Systematic Sequential Sampling	Servicing Records Submitted

**Cohort Year 2013** Data Managers: 3 Defaulted Borrowers: 513 Defaulted Loans: 1498

DM	YEAR	BORROWERS	LOANS	BORROWER SAMPLE SIZE	SAMPLED LOANS	SAMPLING METHOD	STATUS
<a href="#">555</a>	2013	212	728	139	466	Simple Random Sampling	Servicing Records Submitted
<a href="#">583</a>	2013	188	493	129	344	Systematic Sequential Sampling	Servicing Records Submitted
<a href="#">785</a>	2013	113	277	87	215	Systematic Sequential Sampling	Servicing Records Submitted

At the bottom of the form, there are "SAVE" and "CANCEL" buttons.

Figure 163 Appealed years visible when showing perfected

In “Show Perfected” mode, the **SHOW ALL** button is available. The case is in “Show Perfected” mode by default when it becomes available for FSA review.

## Show all



Figure 164 Show All button

Clicking the **SHOW ALL** button puts the Loan Servicing Records section into the “Show All” mode. In this mode:

- All three cohort years, and
- All data managers from whom you requested servicing records are listed in the cohort year table.

Show Perfected

<input checked="" type="checkbox"/> Cohort Year 2015      Data Managers: 3   Defaulted Borrowers: 452   Defaulted Loans: 1310							
Showing 10 records (1 - 3 of 3)							
DM	YEAR	BORROWERS	LOANS	BORROWER SAMPLE SIZE	SAMPLED LOANS	SAMPLING METHOD	STATUS
555	2015	125	304	95	233	Simple Random Sampling	Servicing Records Submitted
583	2015	115	280	89	218	Systematic Sequential Sampling	Servicing Records Submitted
785	2015	212	726	138	473	Systematic Sequential Sampling	Servicing Records Submitted
Showing 10 records (1 - 3 of 3)							
<input type="checkbox"/> Cohort Year 2014      Data Managers: 3   Defaulted Borrowers: 452   Defaulted Loans: 1310							
Showing 10 records (1 - 3 of 3)							
DM	YEAR	BORROWERS	LOANS	BORROWER SAMPLE SIZE	SAMPLED LOANS	SAMPLING METHOD	STATUS
555	2014	125	304	95	230	Simple Random Sampling	Appeal Withdrawn
583	2014	115	280	89	220	Systematic Sequential Sampling	Servicing Records Submitted
785	2014	212	726	138	476	Systematic Sequential Sampling	Servicing Records Submitted
Showing 10 records (1 - 3 of 3)							
<input checked="" type="checkbox"/> Cohort Year 2013      Data Managers: 3   Defaulted Borrowers: 513   Defaulted Loans: 1498							
Showing 10 records (1 - 3 of 3)							
DM	YEAR	BORROWERS	LOANS	BORROWER SAMPLE SIZE	SAMPLED LOANS	SAMPLING METHOD	STATUS
555	2013	212	728	139	466	Simple Random Sampling	Servicing Records Submitted
583	2013	188	493	129	344	Systematic Sequential Sampling	Servicing Records Submitted
785	2013	113	277	87	215	Systematic Sequential Sampling	Servicing Records Submitted
Showing 10 records (1 - 3 of 3)							

Figure 165 All years visible when showing all

In “Show All” mode, the **SHOW PERFECTED** button is available.

## LSAppeal

### LSAppeal information

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Cases ▾Reports ▾Profile ▾Admin ▾Select Perspective

### Loan Servicing Appeal Details

BACK TO CASE

[Loan Servicing Appeal Templates](#)

LSAppeal Processing Actions

No available workflow actions

LSAppeal Information

LSAppeal ID: 9846

Year: 2015

Comment:

SAVECANCEL

Comments

Cohort Year 2015Data Managers: 2 Defaulted Borrowers: 6 Defaulted Loans: 7

Showing 10 records (1 - 2 of 2)

DM	YEAR	BORROWERS	LOANS	BORROWER SAMPLE SIZE	SAMPLED LOANS	SAMPLING METHOD	STATUS
<a href="#">555</a>	2015	4	4				In caseworker review
<a href="#">777</a>	2015	2	3				In caseworker review

Showing 10 records (1 - 2 of 2)

Figure 166 LSAppeal information

The basic information for the adjustment includes the ID, the case type, and the borrower name and SSN. The cohort year table lists the DMs who provided servicing records.

## eCDR Appeals UDA User Guide

Cohort Year 2015

Data Managers: 2 Defaulted Borrowers: 6 Defaulted Loans: 7

Showing 10 records (1 - 2 of 2)

DM	YEAR	BORROWERS	LOANS	BORROWER SAMPLE SIZE	SAMPLED LOANS	SAMPLING METHOD	STATUS
555	2015	4	4				In caseworker review
777	2015	2	3				In caseworker review

Showing 10 records (1 - 2 of 2)

Attached Documents

Confidential Work Papers (for FSA Use Only)

ATTACH FILE

FILE NAME	FILE DESCRIPTION	ACTION
No documents attached		

Decision Letter Enclosures

ATTACH FILE

FILE NAME	FILE DESCRIPTION	ACTION
No documents attached		

Borrower Information Provided by School (School Spreadsheet)

FILE NAME	FILE DESCRIPTION
<a href="#">badfile.txt</a>	i'm bad, i'm bad

Servicing records and documents from Data Manager 555

FILE NAME	FILE DESCRIPTION
<a href="#">badfile.txt</a>	we bad

Servicing records and documents from Data Manager 777

FILE NAME	FILE DESCRIPTION
<a href="#">test_data_lrdrs.xlsx</a>	who's bad?

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Figure 167 LSAppeal documents

The servicing information will be in spreadsheets (mostly) and they will be in the Attached Documents section. The school will have its own section and each DM included in the appeal will have their own sections. This is also where you can attach work papers and the decision letter enclosure appropriate for this cohort year.

### LSAppeal workflow actions

There are no LSAppeal workflow actions available to the FSA user.

## Adjustment actions

There are no LSAppeal actions available to the FSA user.

## LSAppeal DM

### LSAppeal DM information

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Loan Servicing DM Appeal Details

BACK TO CASE

880013:Geographic Center University

LSAppeal DM Processing Actions

REQUEST MORE DATA

LSAppeal DM Information

LSAppeal DM ID: 5809

DM: 555

Year: 2015

Status: In caseworker review

Comment:

SAVECANCEL

Comments

Servicing Records

FILE NAME	FILE DESCRIPTION
badfile.txt	we bad

LSAppeal DM Actions

No available LSAppeal DM actions

Figure 168 LSAppeal DM information

The basic LSAppeal DM consists of the record ID, DM code, cohort year, and status. There are also sub-sections for comments history and for the servicing records information from the DM.

LSAppeal DM Actions		
No available LSAppeal DM actions		
Borrower Servicing Records		
		
BORROWER	NUMBER OF LOANS	DM
<a href="#">000-00-0088</a> <a href="#">Cxxxxxxxx L. Txxxxxxxx</a>	1	555
<a href="#">000-00-0141</a> <a href="#">Rxxxxx C. Exxxxxxxx</a>	1	555
<a href="#">000-00-0153</a> <a href="#">Mxxxxxxxx K. Kxxxx</a>	1	555
<a href="#">000-00-0194</a> <a href="#">Sxxxxxxxx L. Axxxxxxxx</a>	1	555

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Figure 169 LSAppeal DM borrower servicing records section

At the bottom of the page is a table for all the borrowers that the DM has provided servicing records information for.

## LSAppeal DM processing (workflow) actions

LSAppeal DM Processing Actions
<a href="#">REQUEST MORE DATA</a>

Figure 170 LSAppeal DM workflow actions section

The possible workflow actions for an FSA user are listed below:

Request more data (see [REQUEST MORE DATA FROM DATA MANAGER](#)) – available during case worker review

## LSAppeal DM actions

LSAppeal DM Actions
No available LSAppeal DM actions

Figure 171 LSAppeal DM actions section

There are no LSAppeal DM actions available to the FSA user



## Comments

Comment:

Comment text field

Comments history table

SAVE CANCEL

STATUS	COMMENT	TIME STAMP	USER
In caseworker review	In caseworker review	02/01/2018 18:52:17	ecdra.test
Appeal Submitted	Appeal Submitted	02/01/2018 18:22:53	88001300.user
Appeal Certified	Appeal Certified	02/01/2018 18:22:40	88001300.user
Servicing Records Submitted	Servicing Records Submitted	02/01/2018 18:05:54	88001300.user
Servicing Records Submitted	Servicing Records Submitted	02/01/2018 17:55:52	dm555.test555.fsa
Servicing Records Requested	Servicing Records Requested	02/01/2018 17:51:12	88001300.user

Figure 172 LSAppeal DM comments section, FSA user

To add a comment to an LSAppeal DM, use the Comment field on the LSAppeal DM Details page. After clicking **SAVE**, the comment will be added to the Comments history table below the Comment field. Comments will only be visible to those who have access to the record (i.e., Data Managers that have provided servicing records, and Federal Student Aid OPD). Adding a comment is optional.

## Request more data from Data Manager

LSAppeal DM Processing Actions

REQUEST MORE DATA


Figure 173 LSAppeal DM processing action for FSA user, request more data from DM

After reviewing the information provided by the DM, you may find it necessary to request additional data. To request more information, click the **REQUEST MORE DATA** button in the LSAppeal DM Processing Actions section.



## Request additional data from DM

880013:Geographic Center University

 • Request additional information from DM

Request Additional Information from DM

ATTACH FILE

FILE NAME	FILE DESCRIPTION	ACTION
<a href="#">Still more loans stuff.xlsx</a>	Additional Data Request Document: - Need just a little more info on these loans	REMOVE

Request additional information from DM:  

Please provide data on identified loans

REQUEST MORE DATA FROM DM CANCEL

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*Figure 174 Request additional data from DM correspondence page*

You will be provided with a Correspondence page to specify what information you are requesting from the school. If necessary, for example you have a large list of borrowers you need additional data for, you may attach files to the request. Click the **REQUEST MORE DATA FROM DM** button to send the request to the Data Manager.

## Reports for FSA

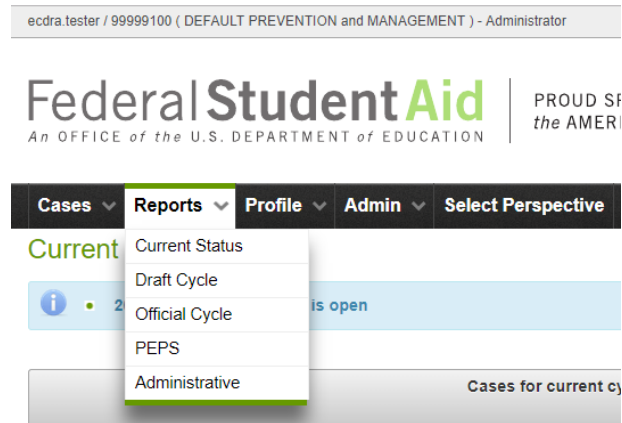


Figure 175 Reports menu options

The options for the Reports menu will open different pages which are described below. Each page may contain multiple tables for the report data. The tables will be collapsed by default because of the amount of data that may be included in them. You can expand the tables you are interested in by clicking the “+” icon on the top right corner of the table header. To collapse the table, click on the “-” icon on the top right corner of the table header.

When some tables are expanded, a spreadsheet icon may become visible above the column headings. You can click on the icon to export the report table as an Excel file.

### Current Status (for FSA)

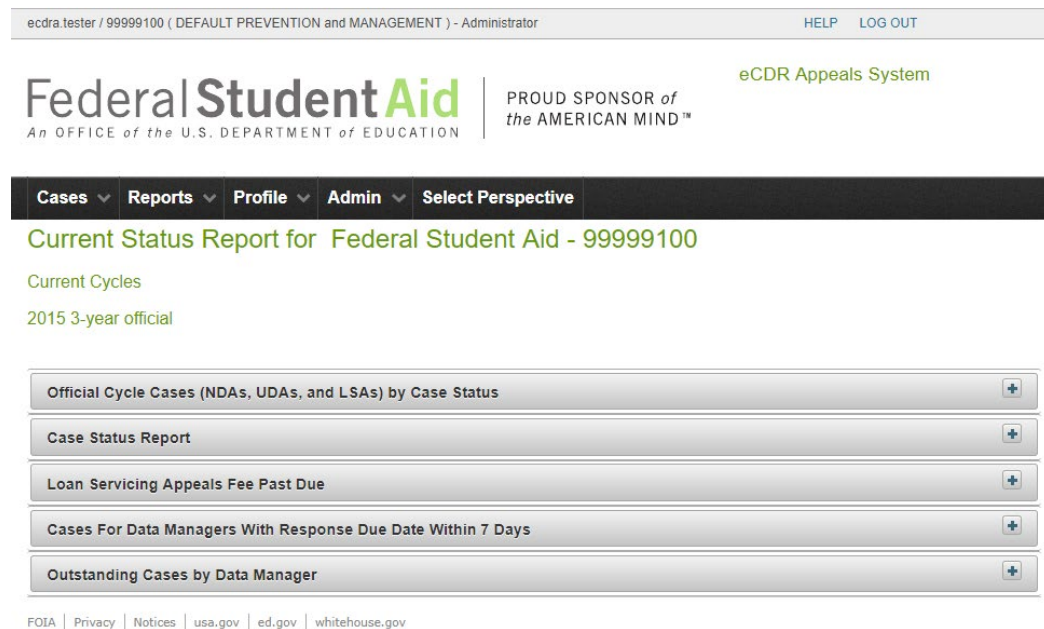


Figure 176 Current status reports page, reports collapsed

## eCDR Appeals UDA User Guide

Current status reports help you determine what is going on with the cases during the cycle. The data is generated when the page is loaded, and it is not automatically updated. To update the data, reload or refresh the page. The page contains the following reports:

### *Official Cycle Cases (NDAs, UDAs, and LSAs) by Case Status*

This report shows the statuses that cases are in and how many cases, for each type, e.g. NDA, UDA, or LSA, there are for each status.

### *Case Status Report*

This report lists all the cases for the cycle and their current status.

### *Loan Servicing Appeals Fee Past Due*

This report lists all the LSAs for which the DM requested a fee, before providing servicing records, and the fee has not yet been paid.

### *Cases for Data Managers with Response Due Date Within 7 Days*

This report lists all the cases for which the DM response will become overdue in 7 days or less.

### *Outstanding Cases by Data Manager*

This report lists all the cases for which the DM still needs to respond.

## Current Status Report for Federal Student Aid - 99999100

Current Cycles

2015 3-year official

**Official Cycle Cases (NDAs, UDAs, and LSAs) by Case Status**

CASE STATUS ▾	CASE TYPE ▾	NUMBER OF CASES ▾
Case in rework	3-YR NDA	1
Case manager review	3-YR NDA	1
Closed	3-YR NDA	3
Closed	3-YR UDA	1
Being prepared	3-YR LSA	1
Caseworker review	3-YR LSA	1
Servicing records being prepared	3-YR LSA	1

**Case Status Report**

**Loan Servicing Appeals Fee Past Due**

OPEID ▾	DATA MANAGER CODE ▾	CASE FILE ID ▾	CASE TYPE	DATE FEE REQUESTED	NUMBER OF DAYS PAST DUE TO PAY FEES
No cases found					

**Cases For Data Managers With Response Due Date Within 7 Days**

**Outstanding Cases by Data Manager**

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Figure 177 Current status reports page, some reports expanded

## Draft Cycle (for FSA)

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**Cases ▾ Reports ▾ Profile ▾ Admin ▾ Select Perspective**

### Draft Cycle Report for Federal Student Aid - 99999100

Select cycle for the reports

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Figure 178 Draft cycle reports page, cycle selection

You need to select the cohort year to generate draft cycle reports from. You can select the available years from a drop-down list and then click **SUBMIT** to generate the reports.

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**Cases** ▾ **Reports** ▾ **Profile** ▾ **Admin** ▾ **Select Perspective**

**Draft Cycle Report for Federal Student Aid - 99999100**

Select cycle for the reports: 2015 3-year draft ▾ **SUBMIT**

- Case Team Statistics +
- School Statistics +
- IDCs by School +
- IDCs by Data Manager +
- IDCs by State +
- Data Manager Statistics +

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*Figure 179 Draft cycle reports generated for selected cycle*

The page contains the following reports:

*Case Team Statistics*

Lists the number of cases per region.

*School Statistics*

Lists the number of cases per school

*IDCs by School*

Lists the schools who submitted IDCs and the Data Managers they submitted the IDCs too.

*IDCs by Data Manager*

Lists the Data Managers who have reviewed IDCs and the schools who have submitted IDCs to them.

### *IDCs by State*

Lists the Data Managers who have reviewed IDCs grouped by state.

### *Data Manager Statistics*

Lists the Data Managers who have reviewed IDCs and the number of agree and disagree responses they made.

#### Draft Cycle Report for Federal Student Aid - 99999100


Select cycle for the reports


2015 3-year draft ▼

SUBMIT


**Case Team Statistics** 


REGION	NUMBER OF IDCs
7	2


**School Statistics** 

**IDCs by School** 

SCHOOL	
DM CODE	DATA MANAGER
880012 Geographic Center University	
555	U.S. Department of Education, Default Prevention and Mgt
785	State Guaranty Agency
880011 Geographic Center University	
777	HURIN HELPMEET

**IDCs by Data Manager** 

**IDCs by State** 

**Data Manager Statistics** 

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*Figure 180 Draft cycle reports page, some reports expanded*

## Official Cycle (for FSA)

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**Cases ▼ Reports ▼ Profile ▼ Admin ▼ Select Perspective**

### Official Cycle Report for Federal Student Aid - 99999100

Select cycle for the reports Select One ▼ SUBMIT

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*Figure 181 Official cycle reports page, cycle selection*

You need to select the cohort year to generate official cycle reports from. You can select the available years from a drop-down list and then click **SUBMIT** to generate the reports.

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**Cases ▾ Reports ▾ Profile ▾ Admin ▾ Select Perspective**

**Official Cycle Report for Federal Student Aid - 99999100**

Select cycle for the reports  **SUBMIT**

Appeals by Data Managers

Appeals by Schools

Appeals by State

IDC to UDA Comparison by Data Manager

Cohort Default Rate Changes Analysis

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Figure 182 Official cycle reports generated for selected cycle

The page contains the following reports:

#### *Appeals by Data Managers*

Lists the Data Managers who received appeals and the schools who submitted appeals to them.

#### *Appeals by Schools*

Lists the schools who submitted appeals and the Data Managers they submitted appeals to.

#### *Appeals by State*

Lists the schools and the number of NDAs and UDAs they submitted grouped by state.

#### *IDC to UDA Comparison by Data Manager*

Lists the Data Managers and how many IDCs and UDAs they received from each school that submitted an IDC, UDA, or both. This provides a good indication of which Data Managers were able to correct issues identified in the IDC so the school did not have to submit a UDA.

### *Cohort Default Rate Changes Analysis*

This report provides detailed numbers on the changes to cohort default rates for each school that submitted an appeal.

#### Official Cycle Report for Federal Student Aid - 99999100

Select cycle for the reports

2015 3-year official ▼

SUBMIT

**Appeals by Data Managers**

DATA MANAGER		
OPEID	SCHOOL NAME	CASE TYPE
785 State Guaranty Agency		
880011	Geographic Center University	3-YR NDA
880012	Geographic Center University	3-YR NDA
555 U.S. Department of Education, Default Prevention and Mgt		
880012	Geographic Center University	3-YR UDA
880014	Geographic Center University	3-YR NDA

**Appeals by Schools**

**Appeals by State**

**IDC to UDA Comparison by Data Manager**

**Cohort Default Rate Changes Analysis**

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Figure 183 Official cycle reports, some reports expanded

## PEPS

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eCDR Appeals System

**Cases** ▼ **Reports** ▼ **Profile** ▼ **Admin** ▼ **Select Perspective**

### PEPS Report for Federal Student Aid - 99999100

Select cycle for the reports

Select One ▼

SUBMIT

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Figure 184 PEPS report page, cycle selection

You need to select the cohort year to generate the PEPS reports from. You can select the available years from a drop-down list and then click **SUBMIT** to generate the reports.



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eCDR Appeals System

Cases ▾ Reports ▾ Profile ▾ Admin ▾ Select Perspective

PEPS Report forFederal Student Aid - 99999100

Select cycle for the reports 2015 3-year official ▾ [SUBMIT](#)

Case Status Reports (Initiated, Perfected, Resolved) +

Adjusted Rates Report +

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Figure 185 PEPS reports generated for selected cycle

The page contains the following reports:

*Case Status Reports (Initiated, Perfected, Resolved)*

This report lists the cases and their milestone dates. The milestones are when the case was created, when it was submitted to FSA, and when it was closed.

*Adjusted Rates Report*

This report lists the schools and a summary of the change in their default rate in the official cycle.

PEPS Report forFederal Student Aid - 99999100

Select cycle for the reports 2015 3-year official ▾ [SUBMIT](#)

Case Status Reports (Initiated, Perfected, Resolved) +

Adjusted Rates Report -

OPEID ↕	SCHOOL NAME	ADJUSTED YEAR	ADJUSTED RATE	ADJUSTED NUMERATOR	ADJUSTED DENOMINATOR	ADJUSTED DATE	PROGRAM TYPE
880014	Geographic Center University	2015	5.3	193	3520	02/06/2018	B

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Figure 186 PEPS report page, report expanded

## Administrative

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**Administrative Reports for Federal Student Aid - 99999100**

Current Cycles

2015 3-year official

From date (inclusive) \*

1/26/18

To date (inclusive) \*

2/1/18

**SUBMIT**

Count of Two-year Cases That FSA Completed Between 01/26/2018 and 02/01/2018 Inclusive

Count of Three-year Cases That FSA Completed Between 01/26/2018 and 02/01/2018 Inclusive

Two-year Cases That Were Reviewed (Completed) Between 01/26/2018 and 02/01/2018 Inclusive

Three-year Cases That Were Reviewed (Completed) Between 01/26/2018 and 02/01/2018 Inclusive

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Figure 187 Administrative reports page

The reports are generated for a time period identified by a “from date” and a “to date” and is inclusive of those dates. When the page is opened, the system will automatically generate a report for the past week. The default “to date” is the current date and the default “from date” is the date 7 days prior to current date. You can change either of those dates to the values you need, although of course it won’t make sense to put a “to date” that is later than the current date and click **SUBMIT** to generate reports for a different time period.

The page contains the following reports:

*Count of Two-year Cases That FSA Completed Between <to date> and <from date>*

Lists the FSA users and the number of two-year cases that they closed out.

*Count of Three-year Cases That FSA Completed Between <to date> and <from date>*

Lists the FSA users and the number of three-year cases that they closed out.

*Two-year Cases That Were Reviewed (Completed) Between <to date> and <from date>*

Lists the FSA users, the two-year cases that they completed, the number of adjustments in each case, and the date that they completed the case.


*Three-year Cases That Were Reviewed (Completed) Between <to date> and <from date>*


Lists the FSA users, the three-year cases that they completed, the number of adjustments in each case, and the date that they completed the case.

Administrative Reports for Federal Student Aid - 99999100


Current Cycles


2015 3-year official

From date (inclusive) \*  


To date (inclusive) \*  


**SUBMIT**

**Count of Two-year Cases That FSA Completed Between 01/01/2018 and 02/28/2018 Inclusive** 

**Count of Three-year Cases That FSA Completed Between 01/01/2018 and 02/28/2018 Inclusive** 

FSA ASSIGNEE	NUMBER OF CASES
fsa.casemanager	3
fsa.caseworker	2

**Two-year Cases That Were Reviewed (Completed) Between 01/01/2018 and 02/28/2018 Inclusive** 

**Three-year Cases That Were Reviewed (Completed) Between 01/01/2018 and 02/28/2018 Inclusive** 

FSA ASSIGNEE	OPEID	CASEFILE ID	NUMBER OF ADJUSTMENTS	REVIEW COMPLETED DATE
fsa.casemanager	880011	303911	1	02/01/2018
fsa.casemanager	880012	303913	1	02/01/2018
fsa.casemanager	880012	303915	1	02/02/2018
fsa.caseworker	880010	303921	2	01/29/2018
fsa.caseworker	880014	303919	1	02/02/2018

Figure 188 Administrative reports page, some reports expanded

## Admin

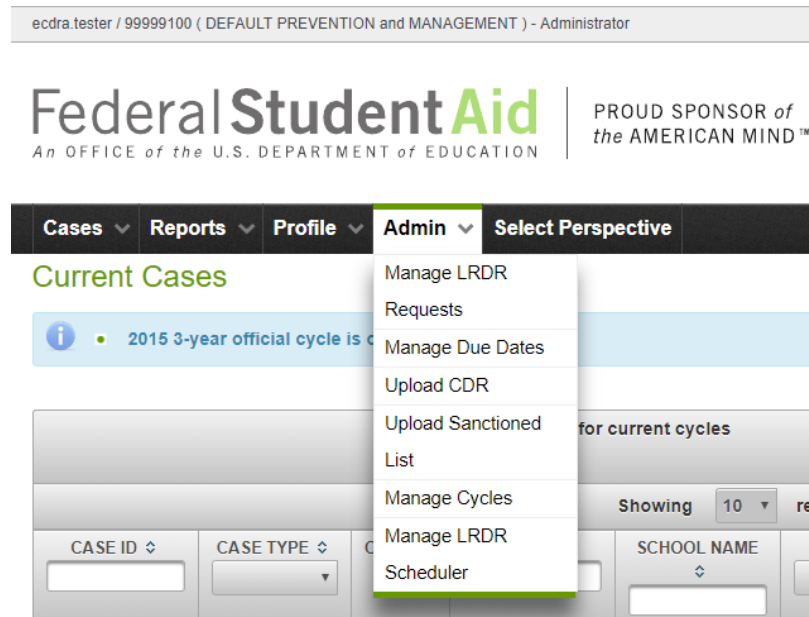


Figure 189 Admin menu, FSA user

### Manage LRDR Requests

This loads the LRDR Request List page. See [LOAN RECORDS DETAIL REPORT \(LRDR\)](#) section on the functions available from this page.

### Manage Due Dates

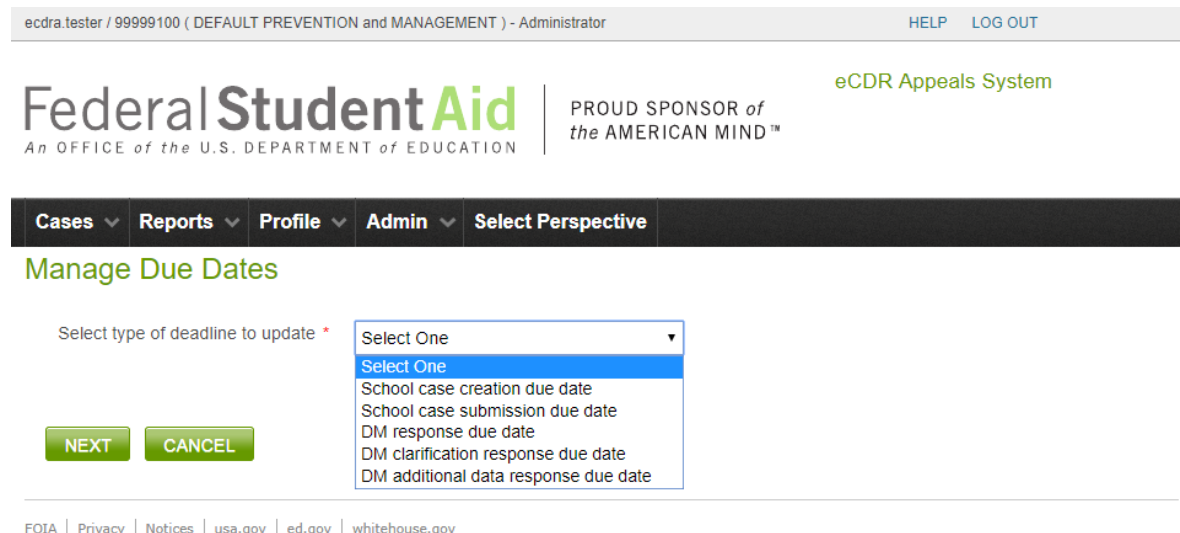


Figure 190 Manage due dates, deadline types

The types of deadlines that can be extended are:

School case creation due date (see [EXTENDING CASE CREATION DUE DATE](#))

School case submission due date (see [EXTENDING CASE SUBMISSION DUE DATE](#))

DM response due date (see [EXTENDING DM RESPONSE DUE DATE](#))

DM clarification response due date (see [EXTENDING DM CLARIFICATION RESPONSE DUE DATE](#))

DM additional data response due date (see [EXTENDING DM ADDITIONAL DATA RESPONSE DUE DATE](#))

You select the deadline type from the drop-down list and click **NEXT** to open the page for extending the selected deadline.

### *Extending case creation due date*

The screenshot shows the eCDR Appeals System interface. At the top, there is a header bar with the user 'ecdra.testar / 99999100 ( DEFAULT PREVENTION and MANAGEMENT ) - Administrator' and links for 'HELP' and 'LOG OUT'. Below the header is the 'Federal Student Aid' logo, with the text 'An OFFICE of the U.S. DEPARTMENT of EDUCATION' and 'PROUD SPONSOR of the AMERICAN MIND™'. To the right of the logo is the text 'eCDR Appeals System'. Below the header is a navigation bar with tabs: 'Cases', 'Reports', 'Profile', 'Admin', and 'Select Perspective'. The 'Cases' tab is selected. Below the navigation bar is the title 'School case creation due date'. A light blue information box contains the following text: 'Following are the Due Date(s) for the available Case Type(s)' followed by a bulleted list: '3-YR UDA : 02/21/2018', '3-YR NDA : 02/06/2018', and '3-YR LSA : 02/06/2018'. Below the information box is a green bar with the title 'School case creation due date'. The form contains the following fields: 'School OPEID \*' with the value '880072', 'Case Type \*' with the value '3-YR LSA', 'New Due Date \*' with the value '2/15/2018' and a calendar icon, 'Select authorized justification for extending deadline \*' with the value 'Other', and 'Justification comment' with the text 'School had problems with user accounts'. At the bottom of the form are two buttons: 'SAVE' and 'CANCEL'.

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**eCDR Appeals System**

**Cases** ▾ **Reports** ▾ **Profile** ▾ **Admin** ▾ **Select Perspective**

**School case creation due date**

**i** • Following are the Due Date(s) for the available Case Type(s)  
• 3-YR UDA : 02/21/2018  
• 3-YR NDA : 02/06/2018  
• 3-YR LSA : 02/06/2018

**School case creation due date**

School OPEID \* 880072

Case Type \* 3-YR LSA ▾

New Due Date \* 2/15/2018

Select authorized justification for extending deadline \* Other ▾

Justification comment School had problems with user accounts

**SAVE** **CANCEL**

*Figure 191 Extending deadline for creating LSA*

The case creation due date can be extended for one school at a time. In the “School case creation due date” page, enter the OPEID of the school, select the type of case from the drop-

down list, enter the new deadline for the school to create the selected case type, and selected the justification for extending the deadline from the drop-down list.

If the justification is “Other”, you should enter more detail in the “Justification comment” text field.

Click **SAVE**. The school will see additional days for creating and submitting the case displayed in the current cases page the next time they log in.

### *Extending case submission due date*

#### School case submission due date

**School case submission due date**

Number of Days to extend deadline \*

7

Select authorized justification for extending deadline \*

Other ▼

Justification comment

These things happen

Showing 10 ▼ records (1 - 2 of 2) 1				
SELECTED	CASE ID	CASE TYPE	OPEID	DEADLINE
<input type="checkbox"/>	303922	3-YR NDA	880021	Fri Feb 09 23:59:59 EST 2018
<input checked="" type="checkbox"/>	303912	3-YR LSA	880011	Tue Feb 06 23:59:59 EST 2018

Showing 10 ▼ records (1 - 2 of 2) 1

SAVE

CANCEL

*Figure 192 Extending deadline for submitting case*

You can extend the case submission due date for several cases at the same time, even if they are different types of cases. Fill out the required fields, select the cases, and click the **SAVE** button. The deadlines for the selected cases will be extended by adding the number of days you specified to their old deadlines.

### Extending DM response due date

#### DM response due date extension

**DM response due date information**

Number of Days to extend deadline \*

5

Select authorized justification for extending deadline \*

System error ▼

Justification comment

Showing 10 records (1 - 9 of 9) 1				
SELECTED	CASE ID	CASE TYPE	DM	DEADLINE
<input type="checkbox"/>	303923	3-YR NDA	555	Sat Feb 24 09:26:18 EST 2018
<input checked="" type="checkbox"/>	303923	3-YR NDA	785	Sat Feb 24 09:26:18 EST 2018
<input type="checkbox"/>	303924	3-YR NDA	555	Sat Mar 03 10:10:10 EST 2018
<input checked="" type="checkbox"/>	303924	3-YR NDA	777	Sat Mar 03 10:10:10 EST 2018
<input type="checkbox"/>	303925	3-YR NDA	555	Fri Mar 02 10:03:58 EST 2018
<input checked="" type="checkbox"/>	303925	3-YR NDA	777	Fri Mar 02 10:03:58 EST 2018
<input checked="" type="checkbox"/>	303925	3-YR NDA	785	Fri Mar 02 10:03:58 EST 2018
<input type="checkbox"/>	303926	3-YR NDA	555	Thu Mar 01 10:00:25 EST 2018
<input checked="" type="checkbox"/>	303926	3-YR NDA	785	Thu Mar 01 10:00:25 EST 2018

Showing 10 records (1 - 9 of 9) 1

SAVE

CANCEL

Figure 193 Extending deadline for DM response

You can extend the DM response due date for multiple cases at the same time if you are extending their deadline by the same number of days. Fill out the required fields and click the **SAVE** button. The number of days you specify will be added to the deadline of all the cases you selected.

### Extending DM clarification response due date

#### DM clarification due date extension

**DM clarification due date information**

Number of Days to extend deadline \*

Select authorized justification for extending deadline \*

Justification comment

Showing 10 records (0 - 0 of 0)

SELECTED	CASE ID	CASE TYPE	DM	DEADLINE
No cases found				

Showing 10 records (0 - 0 of 0)

SAVE

CANCEL

Figure 194 Extending deadline for DM clarification response

You can extend the DM clarification due date for multiple cases at the same time if you are extending their deadline by the same number of days. Fill out the required fields and click the **SAVE** button. The number of days you specify will be added to the deadline of all the cases you selected.

### Extending DM additional data response due date

#### DM additional data due date extension

**DM additional data due date information**

Number of Days to extend deadline \*

Select authorized justification for extending deadline \*

Justification comment

Showing 10 records (0 - 0 of 0)

SELECTED	CASE ID	CASE TYPE	DM	DEADLINE
No cases found				

Showing 10 records (0 - 0 of 0)

SAVE

CANCEL

Figure 195 Extending deadline for DM additional data response



You can extend the DM additional data due date for multiple cases at the same time if you are extending their deadline by the same number of days. Fill out the required fields and click the **SAVE** button. The number of days you specify will be added to the deadline of all the cases you selected.

## Upload CDR

This loads the CDR Upload page. See **COHORT DEFAULT RATES (CDR)** section on the functions available from this page.

## Upload Sanctioned List

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eCDR Appeals System

Cases ▾Reports ▾Profile ▾Admin ▾Select Perspective

Sanctioned List Upload

i

- The list of schools under sanction for the current cohort year (2015) is loaded in the database.

Sanctioned List Upload

Select schools under sanction file: 

Choose File

 No file chosen

SUBMIT

CANCEL

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Figure 196 Sanctioned list upload page

## Manage Cycles

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eCDR Appeals System

Cases ▾ Reports ▾ Profile ▾ Admin ▾ Select Perspective ▾

Manage Cycles

CREATE CYCLE

Current Cycles				
COHORT YEAR ▾	CYCLE TYPE ▾	LRDR RELEASE DATE	START DATE	PLANNED END DATE
2015	3-year official	01/15/2018	01/22/2018	02/28/2019

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Figure 197 Manage cycles page, current cycles table

You will have access to this page only if you have the FSA admin role. From the page, you can click on the year of the cycle type to open it to update or close the cycle. You can also click the Create Cycle button to create a new cycle.

### Update or close cycle Cycle

Cycle Information

Cycle Type

3-year official

Cohort Year

2015

LRDR Release Date \*

Start Date \*

Planned End Date \*

Actual End Date

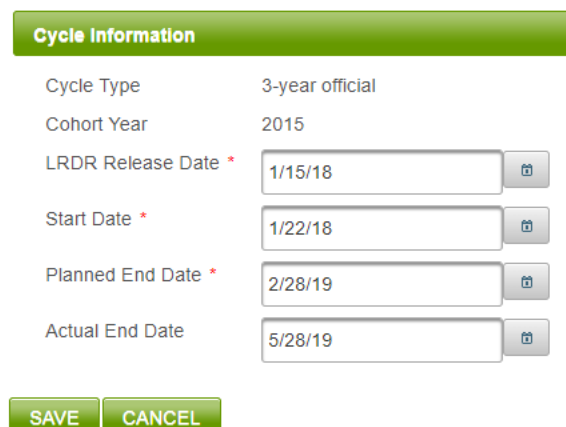
SAVE

CANCEL

Figure 198 Cycle details page

The same page is used to update or close the cycle. If you are only updating, you should only edit the LRDR Release Date, Start Date, or Planned End Date of the cycle. Note that these are all required fields so they cannot be left blank.

## Cycle



Cycle Information	
Cycle Type	3-year official
Cohort Year	2015
LRDR Release Date *	<input type="text" value="1/15/18"/>
Start Date *	<input type="text" value="1/22/18"/>
Planned End Date *	<input type="text" value="2/28/19"/>
Actual End Date	<input type="text" value="5/28/19"/>

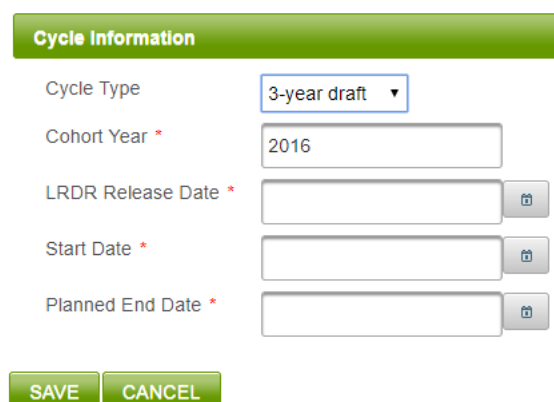
Figure 199 Cycle will be closed with actual end date

The Actual End Date field is not a required field and should be left blank unless you want to close the cycle.

Once you have made the edits you wanted to do, click the **SAVE** button. If you wish to discard the changes you made, click the **CANCEL** button. After clicking either button, you will be brought back to the Manage Cycles page. If you entered a value in the Actual End Date field, the cycle will be closed and will no longer be listed in the Cycles table.

### Create cycle

## New Cycle



Cycle Information	
Cycle Type	<input type="text" value="3-year draft"/>
Cohort Year *	<input type="text" value="2016"/>
LRDR Release Date *	<input type="text"/>
Start Date *	<input type="text"/>
Planned End Date *	<input type="text"/>

Figure 200 New cycle page

To create a new cycle, fill in all the required fields and click **SAVE**. The Cycle Type and Cohort Year fields will be automatically filled in with the information for the cycle that will follow the latest open cycle. Normally that will be the current cycle. So, for example, if the current cycle is 3-year official 2015, the Cycle Type field will automatically be set to 3-year draft and the Cohort Year field will automatically be set to 2016.

You may change either Cycle Type or Cohort Year, or both, to whatever value you choose, but note that you cannot create a duplicate cycle. That is, if you already have a 3-year official 2015 cycle, you cannot create another 3-year official 2015 cycle.

After clicking **SAVE**, you will be brought back to the Manage Cycles page and the new cycle will be added to the Cycles table.

### **Manage LRDR Scheduler**

This page will allow the admin to suspend and restart the scheduler for automated LRDR ordering and loading. This ability is provided in case there is an issue with uploading of the LRDR and some time is needed to implement a fix. In the past, loading issues have caused hung threads that severely degraded performance of the application. To avoid this, the scheduler should be suspended until the issue is fixed.