Electronic Cohort Default Rate Appeals (eCDR Appeals)

New Data Adjustment (NDA) User Guide

Version 5.0.0

4/24/2019

DOCUMENT VERSION HISTORY

Version	Release Date	Summary of Changes	Name
2.0	9/7/2008	Initial release of User Guide.	Federal Student Aid CIO Application Support Team
2.01	9/16/2008	Minor updates to wording throughout	Federal Student Aid CIO Application Support Team
2.20	9/10/2009	Updated throughout to reflect eCDRA 2.2.0	Federal Student Aid CIO Application Support Team
3.1.0	9/1/2016	Updated throughout to reflect eCDRA 3.1.0	Federal Student Aid CIO Application Support Team
3.1.2	10/24/2010	Rename Portfolio Performance Division (PPD) to Operations Performance Division (OPD)	Federal Student Aid CIO Application Support Team
3.4.0	9/29/2012	Updated to reflect eCDRA Release 3.4.0 - Highlighted that case submission is separate step from case certification (Table 1-1 and Sections 7.5, 14.3) - Edited Section 1.2 to explain status codes - Modified Section 2.1 to address two factor authentication at login - Added Section 23.1 – OPD Reports - Minor edits to Section 4.3 – OPD managing LRDR Extracts - Replaced some screenshots throughout	Federal Student Aid TO-ADG Business Analysis Team
5.0.0	4/24/2019	Complete rewrite based on eCDRA Release 5 and current FSA look and feel guidance.	Federal Student Aid CIO Application Support Team

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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: the 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 NDA 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/
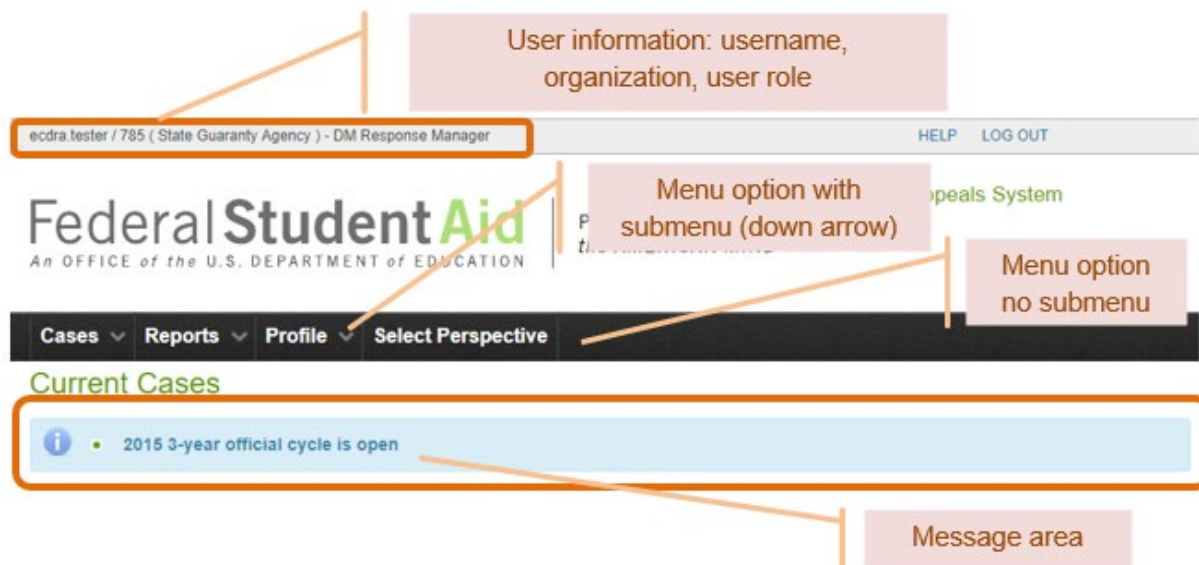
Navigation

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…).

Figure 2 Page section - adjustment 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.

DM Adjustment Information

Request Adjustment Id:	1715588
Case Type:	3-YR NDA
SSN:	000000026
Name:	Kxxxxxx, Mxxxxxxx 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.

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

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.

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.

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 IDC case types listed in the table, only IDC 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.

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.

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.

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

Figure 11 Current 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.

Cases for current cycles							**RESET FILTERS**

Showing 10 ▼ records (1 - 10 of 10) |◄ ◄◄ 1 ►► ►|

CASE ID ⇕	CASE TYPE ⇕	COHORT YEAR	OPEID ⇕	SCHOOL NAME ⇕	STATUS ▲	STATUS DATE	ASSIGNED TO ⇕
30356	▼				▼		
303567	3-YR NDA	2015	111111	UNIVERSITY OF IO	Caseworker decision review	11/23/2018	fsa.caseworker ▼ ASSIGN
303564	3-YR IDC	2015	880013	Geographic Center University 14	Caseworker review	12/14/2018	fsa.caseworker ▼ ASSIGN
303565	3-YR IDC	2015	880012	Geographic Center University 13	Caseworker review	12/03/2018	fsa.caseworker ▼ ASSIGN
303561	3-YR IDC	2015	111111	UNIVERSITY OF IO	Closed	11/15/2018	
303566	3-YR UDA	2015	111111	UNIVERSITY OF IO	Closed	11/23/2018	
303560	3-YR IDC	2015	999989	Martian Rover Institute of Technology	Closed	11/02/2018	
303563	3-YR IDC	2015	880015	Geographic Center University 16	Closed	11/15/2018	
303569	3-YR NDA	2015	880015	Geographic Center University 16	Closed	12/07/2018	
303568	3-YR NDA	2015	880012	Geographic Center University 13	Data Manager review	11/28/2018	
303562	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 Current 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.

				Cases for current cycles			
							RESET FILTERS

Showing [25 ▼] records (1 - 15 of 15) |◄ ◄◄ [1] ►► ►|

CASE ID ⇕	CASE TYPE ⇕	COHORT YEAR	OPEID ⇕	SCHOOL NAME ⇕	STATUS ⇕	STATUS DATE	ASSIGNED TO ⇕
303565	3-YR IDC	2015	880012	Geographic Center University 13	Caseworker review	12/03/2018	fsa.caseworker ▼ ASSIGN
303561	3-YR IDC	2015	111111	UNIVERSITY OF IO	Closed	11/15/2018	
303573	3-YR IDC	2015	880024	Geographic Center University 25	Perfected/Available for FSA review	11/19/2018	Not assigned ▼ ASSIGN
303572	3-YR IDC	2015	880023	Geographic Center University 24	Closed	11/05/2018	
303560	3-YR IDC	2015	999989	Martian Rover Institute of Technology	Closed	11/02/2018	
303563	3-YR IDC	2015	880015	Geographic Center University 16	Closed	11/15/2018	
303562	3-YR IDC	2015	880010	Geographic Center University 11	Data Manager review	12/18/2018	
303571	3-YR IDC	2015	880020	Geographic Center University 21	Closed	01/03/2019	
303564	3-YR IDC	2015	880013	Geographic Center University 14	Caseworker review	12/14/2018	fsa.caseworker ▼ ASSIGN
303566	3-YR UDA	2015	111111	UNIVERSITY OF IO	Closed	11/23/2018	
303567	3-YR NDA	2015	111111	UNIVERSITY OF IO	Caseworker decision review	11/23/2018	fsa.caseworker ▼ ASSIGN
303569	3-YR NDA	2015	880015	Geographic Center	Closed	12/07/2018	

Figure 13 Current cases with 25 records per page selected

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 Collapsed comments history table

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.

Figure 15 Expanded comments table

General information

Email notifications

The eCDR Appeals application is designed to send out automatic email notifications to affected parties whenever updates to NDA 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 NDA 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)

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 initial submission of the NDA 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 for the school to respond to additional data request is the same deadline for submitting the case. The deadline to respond to other 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 sub-menu

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

Figure 17 Organization contact information

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 should already be filled out. 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

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.
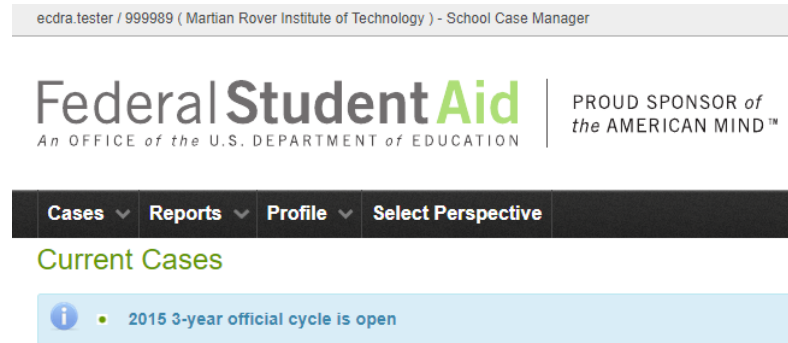
Menus

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

Cases for schools
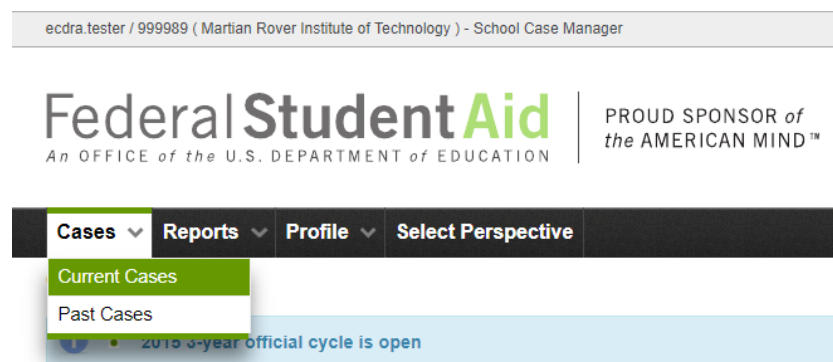
Figure 21 School user cases menu options

Current cases (school view)
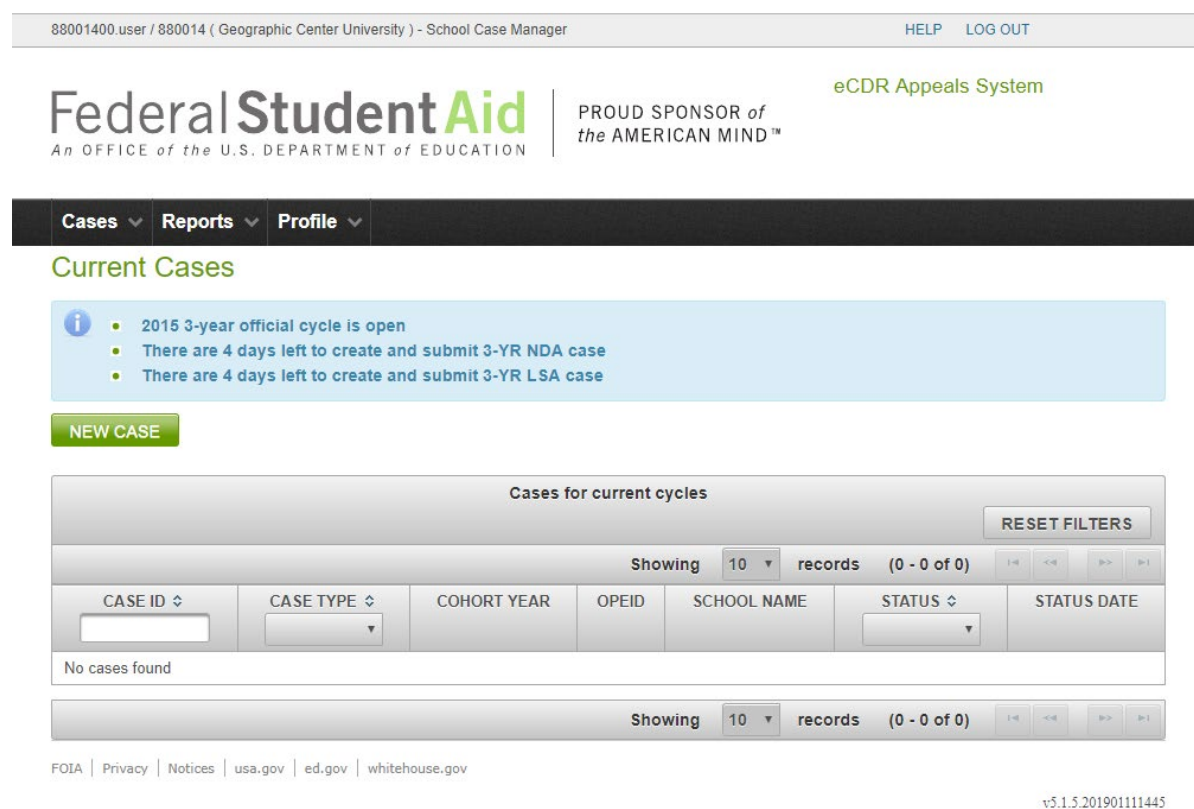
Figure 22 School user current cases page

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)

Figure 23 School user past cases page

All the cases created by the school from previous cohort years.

Case (school view)

Figure 24 Case details page

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).

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 NDA 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 case workflow actions section is shown in Figure 24.

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

Certify (see Certifying the NDA for Data Manager)

Submit (see Submitting the NDA to Data Manager)

Certify for FSA (see Certifying the NDA for FSA)

Submit to FSA (see Submitting the NDA to FSA)

Withdraw (see Withdrawing NDA)

Case actions

Figure 25 Case actions, school user

Case actions do not affect the workflow and will not change the status of the case. The system makes the appropriate actions available based on the status of the case. The list of all case actions available for a school user is listed below:

New Adjustment (see ADDING A NEW ADJUSTMENT)

Comments

Figure 26 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 selecting "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 NDA

Figure 27 New case button

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

Figure 28 Create case page

A new case will be created, and the Case Details page will now display basic information about the case.

If Federal Student Aid has not yet loaded the prerequisite Loan Record Detail Report (LRDR) extracts for your institution, your case will begin in "Awaiting LRDR" status. The time your NDA remains in "Awaiting LRDR" status does not count against the 15-day deadline to submit the NDA to data managers, or the 30-day deadline to submit the perfected NDA to Federal Student Aid. Once Federal Student Aid has loaded the LRDRs, the countdown to the deadline will resume.

If applicable, after Federal Student Aid completes loading the LRDR extracts for your institution, an automatic email notification will be sent to the organization and individual email addresses you specified in your profile. Once the LRDRs have been loaded into the system, you may proceed with preparing the case.

If the necessary LRDR extracts have already been loaded at the time you created the new case, then the case's status will read "Being Prepared". In this situation, you may immediately continue working on your case since you do not have to wait for a LRDR extract to be loaded.

Preparing the NDA

Once the LRDRs are loaded, the case will go to "Being Prepared" status. At this point, you can begin adding adjustments and comments, and then eventually submit your NDA.

Adding a new adjustment

Figure 29 New adjustment button

To add an adjustment to your NDA, select the NEW ADJUSTMENT button in the Case Actions section of the Case Details page. This opens the Borrower Selection page.

Selecting a borrower

88001400.user / 880014 (Geographic Center University) - School Case Manager   HELP   LOG OUT

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eCDR Appeals System

Cases ⌄   Reports ⌄   Profile ⌄

Borrower Selection

ⓘ • Fields marked with (*) are required
   • Please enter the Borrower's SSN in 123456789 format

880014:Geographic Center University

Borrower Information

SSN: * | 000000026 |

CREATE ADJUSTMENT   CANCEL

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

v5.1.5.201901111445

Figure 30 Borrower selection page

Enter the borrower's social security number. Do not use dashes or spaces when entering the SSN. After you enter the SSN, select the CREATE ADJUSTMENT button.

The eCDR Appeals system will search for the specified borrower in your institution's LRDR. If the system was able to find the borrower's information, you will be taken directly to the Adjustment Details screen with the borrower's SSN and name already filled in.

If the eCDR Appeals system could not find the borrower's SSN in your institution's LRDR, you will be given the option to either re-enter the SSN or manually add the borrower details

Figure 31 Borrower not found in LRDR

If you entered the SSN incorrectly, you should re-enter the correct SSN and select the first **CREATE ADJUSTMENT** button. If, however, you intended to add a borrower that is not in the LRDR but should be included for the purpose of calculating your cohort default rate, enter the borrower's SSN and name and click the second **CREATE ADJUSTMENT** button.

Entering adjustment details

Figure 32 New adjustment details page

After selecting a borrower, the Adjustment Details page will be displayed. The borrower's information will be filled in for you. The Adjustment Details form allows you to specify what should be the correct information for the borrower's loans.

Figure 33 Adjustment details page

When you are done entering the information, select the **SAVE** button. The Adjustment Details page will refresh and will display additional options for editing (see EDITING AN ADJUSTMENT) or removing (see REMOVING AN ADJUSTMENT) the adjustment.

Removing an adjustment

Figure 34 Delete adjustment button

To remove an adjustment from your case, click the **DELETE ADJUSTMENT** button in the Adjustment Actions section of the Adjustment Details page. A confirmation page will load, prompting you to verify the removal of the adjustment. Click **OK** to complete the deletion of the adjustment; you will be returned to the Case Details page. Click **CANCEL** to return to the Adjustment Details page without deleting the adjustment.

Editing an adjustment
See ADJUSTMENT

Certifying the NDA for Data Manager

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

Figure 35 Case certify button

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 NDA is correct under penalty of perjury.

Figure 36 Case certification upload page

Click the **CHOOSE FILE** 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 NDA before submitting to Data Manager

Figure 37 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 add another borrower, attach another document, etc., you will need to decertify the NDA. Open the case and from the Case details page, click the **DECERTIFY** button. The Current Cases page will load, and the NDA will be listed with "Being Prepared" status. The certification letter will also have been removed.

Submitting the NDA to Data Manager

Figure 38 Case submit workflow action, school user

From the Case Details page, click **SUBMIT**. A confirmation page will load.
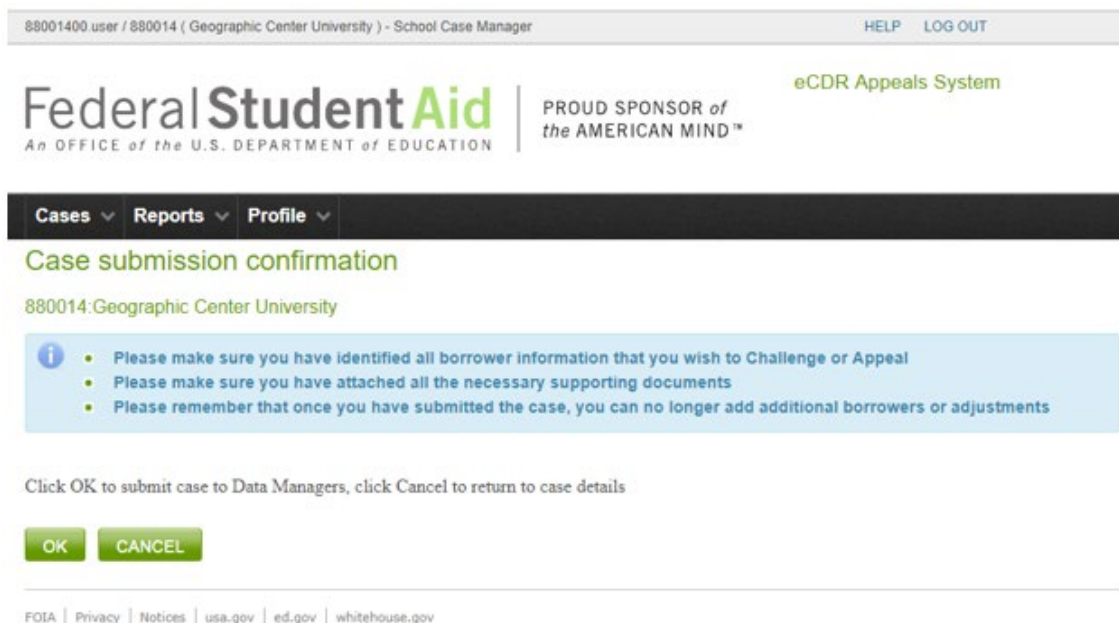
Figure 39 Case submission confirmation page

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 the Data Managers.

Once the case is submitted, you will be returned to the Current Cases list which will show the case status as "Submitted". You will no longer be able to modify the NDA case. The appropriate Data Managers will automatically be notified of the submitted NDA.

When the Data Managers complete their review of your NDA and submit their responses, you will be notified via email. The email will be sent to the email address you specified in your profile contact information.

Endling clarification request period

Figure 40 Case, no clarification workflow action, school user

When a Data Manager (DMs) responds, you have 15 days to request clarification from the DM regarding the response. When all DMs have responded, the system waits at least 15 days from when the last DM responded, to allow schools to request clarification, before making the buttons to submit the case to FSA available. If you do not need to request clarification, or if you have already requested and received clarifications and do not need to request any more, you can cut the wait time short and end the clarification request period immediately.

Click on button NO CLARIFICATION NEEDED. A confirmation page will load to verify if you are certain that no further clarification from data managers will be required for this case.

Once you confirm that no further clarification will be needed in the future by clicking the NO CLARIFICATION NEEDED button, the Current Cases page loads and the NDA will be listed with status "Case in rework".

Removing disagrees from case
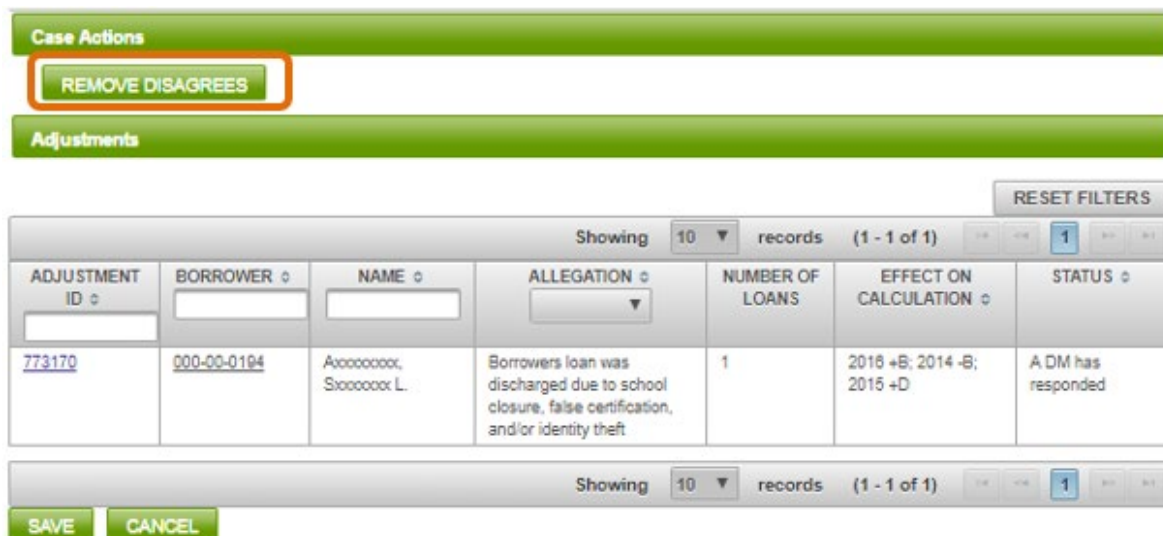
Figure 41 Case remove disagrees

If any DM adjustments have a response of disagree, they must be removed from the NDA before it is submitted to FSA. In such a situation, a REMOVE DISAGREES button will become available in the Case Actions section. Click on the button. All the DM adjustments with a response of disagree will no longer be listed in the case.

Certifying the NDA for FSA

Figure 42 Case certify for FSA workflow action, school user

Once you have verified that all comments and documentation are ready and you are prepared to upload the certification, select the **CERTIFY** button at the top right of the Case Details page. This will load an Attachments page where you can choose the file that contains the President/CEO's certification.
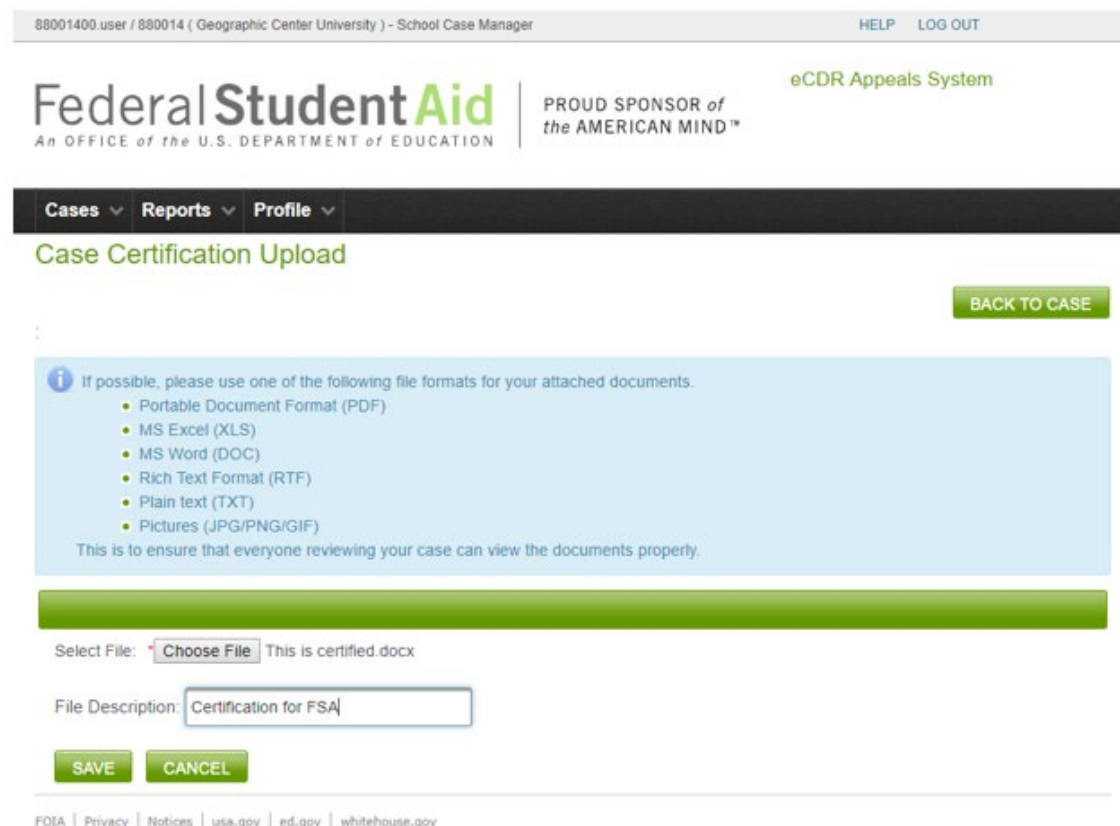
Figure 43 Case certification, for FSA, upload page

Enter a short description in the File Description field, "Certification" or "Certification for FSA" is typical. When you are done, select **SAVE**. While the case is certified, you cannot make any modifications to it.

Decertifying the NDA before submitting to FSA

Figure 44 Case decertify, for FSA, workflow action; school user

If you wish to make modifications to the case or replace the certification letter before you submit the case, click **DECERTIFY**. The case will revert to "Case in rework" status, allowing you to make changes. The certification letter will also be removed from the case.

Submitting the NDA to FSA

Figure 45 Case submit to FSA workflow action, school user

Once you are prepared to submit the case to Federal Student Aid, click **SUBMIT** in the Workflow Actions section of the Case Details page. This will display a confirmation page.
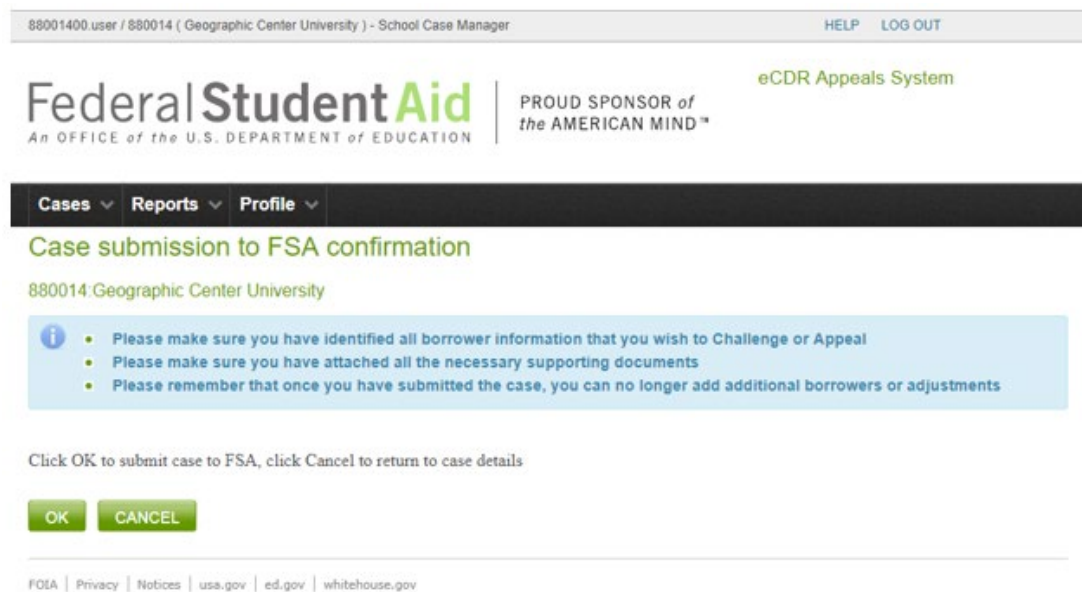
Figure 46 Case submit to FSA confirmation page

This page offers a reminder to make sure all necessary documentation is attached when 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 Federal Student Aid.

Once the case is submitted, you will be returned to the Current Cases list. You will no longer be able to modify the NDA case. OPD and the appropriate Data Managers will automatically be notified of the submitted NDA. Additionally, the status of the case in your Current Cases list will indicate that it is "Perfected/Available for FSA Review", signifying that the case is now available for OPD to review.

When OPD completes their review of your NDA and submits their response, you will be notified via email. The email will be sent to the email address you specified in your profile.

Withdrawing NDA

Figure 47 Case withdraw button, in rework

You may withdraw the NDA while in rework or after it has been certified.

Figure 48 Case withdraw button, certified for FSA

If you wish to withdraw the case, click the **WITHDRAW** button. You will be presented with a confirmation page. If you wish to withdraw the case, click the **OK** button.
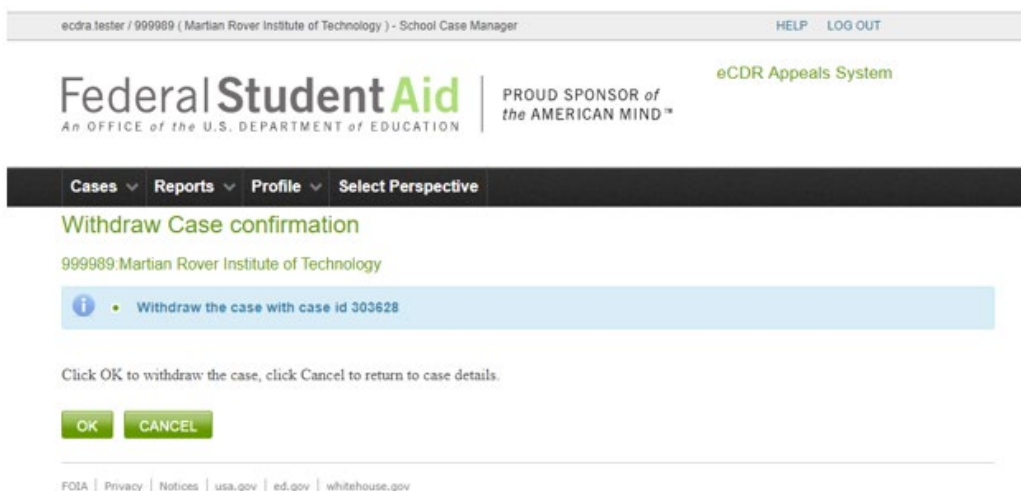
Figure 49 Case withdraw confirmation page

To return to the Case Details page without withdrawing your case, select the CANCEL button. Once you withdraw your case, you will be unable to submit it.

Adjustment

Figure 50 Adjustment detail page, school

Adjustment information

The basic adjustment information includes its ID, the type of case it is for, the borrower information, and the number of loans affected. The specifics of the adjustment are in a sub-section labeled as School Input. This is where you enter what you deem as the correct information for the loans instead of what was shown in the LRDR and what adjustments should be done to the calculation. For example, if the borrower is being counted in the denominator of

your default rate and you think the borrower should not be, you would select a "-D", that is, the borrower should be subtracted from the denominator.

Adjustment processing actions

There are no adjustment processing actions available for an adjustment. This section has been kept to maintain consistency with the Case Detail and the DM Adjustment page.

Adjustment actions

Figure 51 Adjustment actions for school

New adjustment (see ADDING A NEW ADJUSTMENT)

Select/Deselect loans (see SELECTING/DESELECTING)

Change data manager (see CHANGING THE DATA MANAGER)

Delete adjustment (see REMOVING AN ADJUSTMENT)

Comments

Figure 52 Adjustment comments

To add a comment to an adjustment, use the Comment field on the Adjustment Details page (Figure 52). 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 adjustment (i.e., Data Managers that are associated with a loan in the adjustment, and Federal Student Aid OPD). Adding a comment is optional.

Supporting documents

Attaching documents

Figure 53 Adjustment attach file

To attach documentation for the adjustment, click the ATTACH FILE button in the Supporting Documents section of the Adjustment Details page. The Attachments page will load, prompting you to choose a file and enter a description.

Figure 54 Adjustment document upload page

Once you have chosen the correct document, enter a basic description of the document in the "File Description" field, then select the SAVE button to add it to the adjustment. This will return you to the Adjustment Details page, where your newly attached file and its description will be displayed under the "Supporting Documents" table. Alternatively, if you decide not to attach a file at that time, select the CANCEL button to return to the Adjustment Details page without attaching a file.

You may attach as many pieces of documentation as you need but they must be uploaded one-at-a-time.

Removing documents

Figure 55 Adjustment remove document button

To remove a supporting document, select the REMOVE button in the Action column of the Supporting Documents table. The file in the same row as the REMOVE button will be deleted from the adjustment.

Loans

Selecting/Deselecting

Figure 56 Adjustment action, select/deselect loans

When a borrower is selected in an adjustment, all the loans for that borrower are automatically included in the adjustment. If there are some loans that should not be included, you can specify which loans should or should not be included in the adjustment. To identify the loans to include/not include, click the SELECT/DESELECT LOANS button in the Adjustment Actions section of the Adjustment Details form. This will bring up the Select/Deselect Loans page.

Loan Select/Deselect

BACK TO ADJUSTMENT

880015:Geographic Center University

Borrower Loans Information

Adjustment ID: 703864
Borrower SSN: 000000026
Borrower Name: Kxxxxxx, Mxxxxxxx J.
Case Type: 3-YR NDA
Number of Loans: 4
Basis of Alleged Error: Federal SLS loan and Federal Stafford Loan not linked

ADD LOAN MANUALLY

Unselected Loans (from LRDR)

SELECTED	LOAN ID	LOAN TYPE	DM	LOAN STATUS	REPAYMENT DATE	DEFAULT DATE	START DATE	END DATE	GUARANTY DATE	AMOUNT	CDR USAGE1
No records found											

Selected Loans

SELECTED	LOAN ID	LOAN TYPE	DM	LOAN STATUS	REPAYMENT DATE	DEFAULT DATE	START DATE	END DATE	GUARANTY DATE	AMOUNT	CDR USAGE1
☑	1715666	SF	555	RP	11/23/2009		07/14/2008	03/14/2009	06/12/2008	$3,500.00	D
☑	1715667	SU	555	RP	11/23/2009		07/14/2008	03/14/2009	06/12/2008	$6,000.00	E
☑	1715668	SU	555	RP	11/23/2009		03/16/2009	05/23/2009	04/24/2009	$2,333.00	E
☑	1715669	SF	555	RP	11/23/2009		03/16/2009	05/23/2009	04/24/2009	$1,750.00	E

SAVE   CANCEL

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

Figure 57 Loans selected

On this page, the loans that are included in the adjustment are listed in the Selected Loans table and have their associated checkboxes in the Selected column checked. To remove the loans from the adjustment, click on the checkbox to remove the check.

Unselected Loans (from LRDR)

SELECTED	LOAN ID	LOAN TYPE	DM	LOAN STATUS	REPAYMENT DATE	DEFAULT DATE	START DATE	END DATE	GUARANTY DATE	AMOUNT	CDR USAGE1
No records found											

Selected Loans

SELECTED	LOAN ID	LOAN TYPE	DM	LOAN STATUS	REPAYMENT DATE	DEFAULT DATE	START DATE	END DATE	GUARANTY DATE	AMOUNT	CDR USAGE1
☑	1715666	SF	555	RP	11/23/2009		07/14/2008	03/14/2009	06/12/2008	$3,500.00	D
☑	1715667	SU	555	RP	11/23/2009		07/14/2008	03/14/2009	06/12/2008	$6,000.00	E
☐	1715668	SU	555	RP	11/23/2009		03/16/2009	05/23/2009	04/24/2009	$2,333.00	E
☐	1715669	SF	555	RP	11/23/2009		03/16/2009	05/23/2009	04/24/2009	$1,750.00	E

SAVE   CANCEL

Figure 58 Loans unchecked, ready to be unselected

When you have identified all the loans that need to be removed, click the **SAVE** button. You will be returned to the Adjustment Detail page. If you look at the DM adjustments table, you will note that the number of loans will have changed.

You can reselect the unselected loans if you wish.

Figure 59 Unselected and selected loans

Go back to the Loan Select/Deselect page. In the Unselected Loans table, put a check in the checkboxes of the loans you wish to include in the adjustment. When you have selected all the loans you wish to include, click the **SAVE** button.

Manually adding
NOTE: You must attach relevant supporting documentation on the Adjustment Details page before the eCDR Appeals system will allow you to manually add a loan. This ensures that there is information to support the loan.
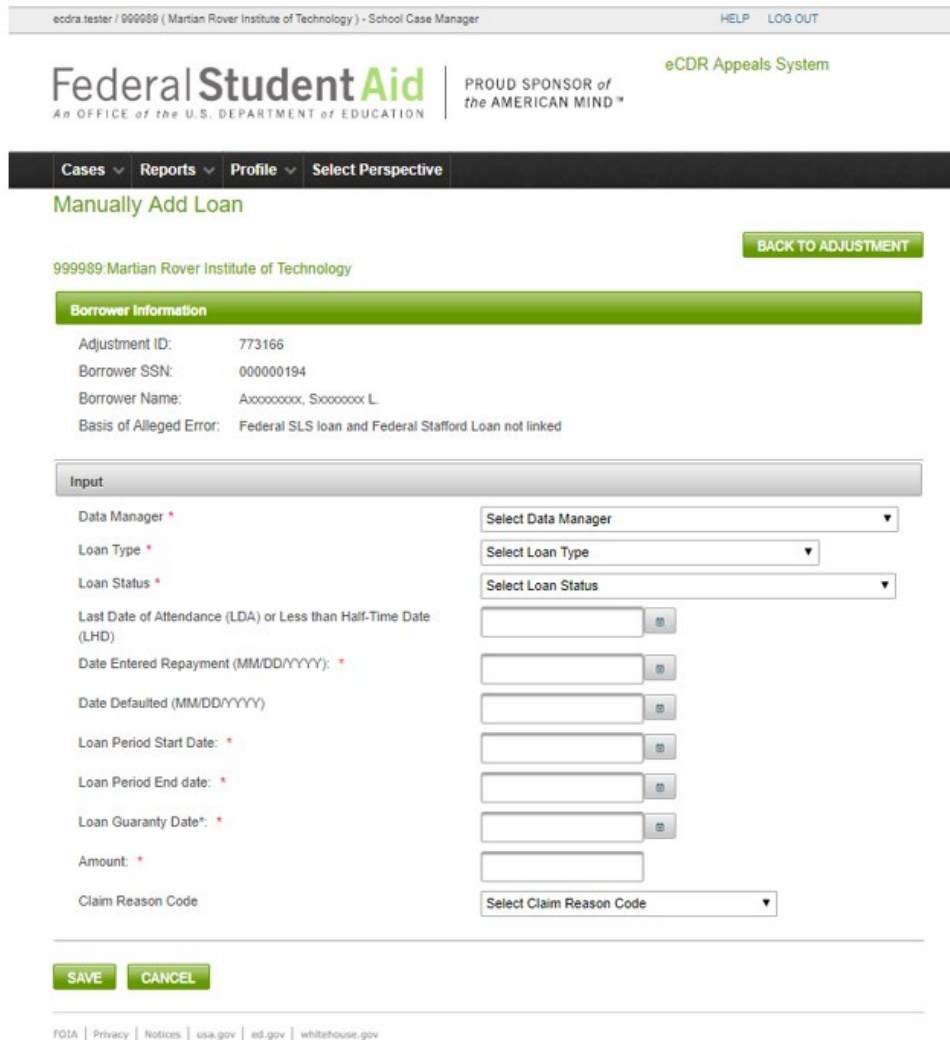
Figure 60 Add loan manually button

If the borrower has a loan that is not listed in the "Loans from LRDR" table, then you can manually add the loan details.

To manually enter a loan that is not in the LRDR, select the **ADD LOAN MANUALLY** button on the Select/Deselect Loans page. This will bring up the Manual Loan page, allowing you to enter the loan details.

Figure 61 Manual loan page

NOTE: When manually entering a loan, the information entered should come from NSLDS. Do not enter the adjustment information that was entered on the Adjustment Details page. The Manual Loan information should include the loan details as currently reflected in NSLDS to make it easy to identify which loans are the subject of the adjustment.

Once you have entered the loan information, select the **SAVE** button. You will be returned to the Select/Deselect Loans page, and the manually added loan will appear in the "Selected Loans" list.

Figure 62 Loan manually added

The easiest way to identify if a loan was manually is to check the CDR Usage1 code. If it is blank, then the loan was manually added. A manually added loan will always be in the Selected Loans table. If you unselect it, the loan will be simply deleted. It will not be moved to the Unselected Loans table.

Removing an adjustment
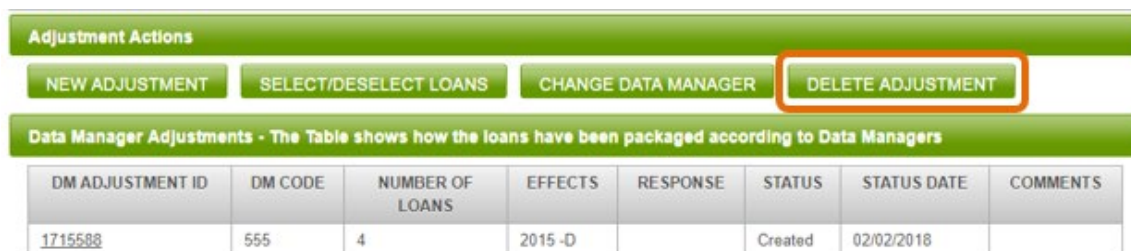
Figure 63 Delete adjustment button

To remove an adjustment from your case, select the DELETE ADJUSTMENT button on the Adjustment Details page of the adjustment you wish to remove.
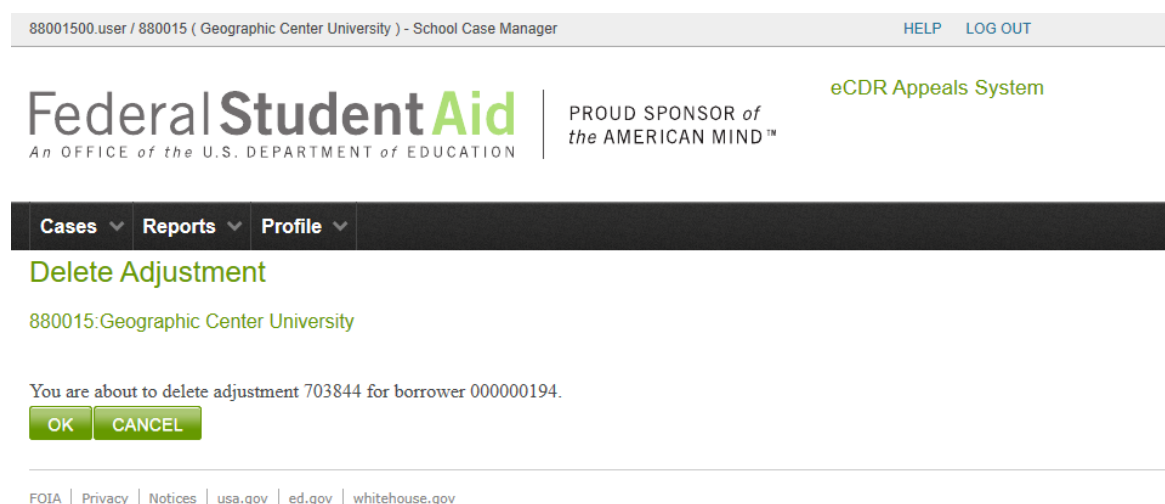
Figure 64 Delete adjustment confirmation

You will be presented with a confirmation page. Click OK to delete the adjustment. Click CANCEL to return to the case without deleting the adjustment.

Changing the Data Manager
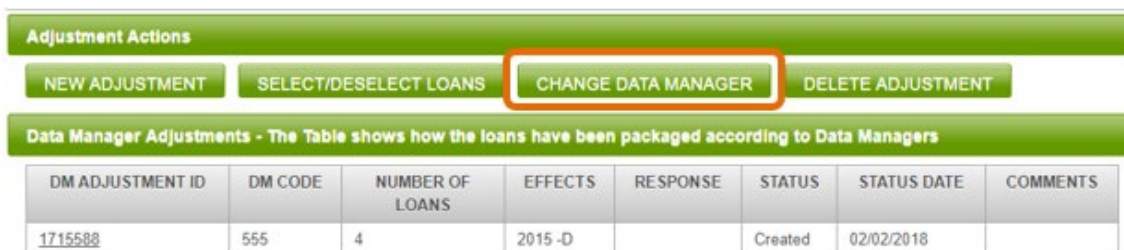
Figure 65 Adjustment Change Data Manager button

If you find that a loan is associated with an incorrect data manager, you have the option to change the data manager for specific loans. To change a data manager, click the CHANGE DATA MANAGER button in the Adjustment Actions section of the Adjustment Details page.

Change Data Manager

BACK TO ADJUSTMENT

880015:Geographic Center University

Borrower Loans Information

Adjustment ID: 703864
Borrower SSN: 000000026
Borrower Name: Kxxxxxx, Mxxxxxxx J.
Case Type: 3-YR NDA
Number of Loans: 4
Basis of Alleged Error: Federal SLS loan and Federal Stafford Loan not linked

Select DM Code: *   Select One

Loans

SELECTED	LOAN ID	LOAN TYPE	DM	LOAN STATUS	REPAYMENT DATE	DEFAULT DATE	START DATE	END DATE	GUARANTY DATE	AMOUNT	CDR USAGE1
☐	1715645	SU	555	RP	11/23/2009		03/16/2009	05/23/2009	04/24/2009	$2,333.00	E
☐	1715646	SF	555	RP	11/23/2009		03/16/2009	05/23/2009	04/24/2009	$1,750.00	E
☐	1715666	SF	555	RP	11/23/2009		07/14/2008	03/14/2009	06/12/2008	$3,500.00	D
☐	1715667	SU	555	RP	11/23/2009		07/14/2008	03/14/2009	06/12/2008	$6,000.00	E

SAVE   CANCEL

Figure 66 Change Data Manager page

The Change Data Manager page will be displayed. All the loans associated with the adjustment will be listed in the Loans table.

Change Data Manager

BACK TO ADJUSTMENT

880015:Geographic Center University

Borrower Loans Information

Adjustment ID: 703864
Borrower SSN: 000000026
Borrower Name: Kxxxxxx, Mxxxxxxx J.
Case Type: 3-YR NDA
Number of Loans: 4
Basis of Alleged Error: Federal SLS loan and Federal Stafford Loan not linked

Select DM Code: * [785 - State Guaranty Agency ▾]

Loans

SELECTED	LOAN ID	LOAN TYPE	DM	LOAN STATUS	REPAYMENT DATE	DEFAULT DATE	START DATE	END DATE	GUARANTY DATE	AMOUNT	CDR USAGE1
☑	1715645	SU	555	RP	11/23/2009		03/16/2009	05/23/2009	04/24/2009	$2,333.00	E
☑	1715646	SF	555	RP	11/23/2009		03/16/2009	05/23/2009	04/24/2009	$1,750.00	E
☐	1715666	SF	555	RP	11/23/2009		07/14/2008	03/14/2009	06/12/2008	$3,500.00	D
☐	1715667	SU	555	RP	11/23/2009		07/14/2008	03/14/2009	06/12/2008	$6,000.00	E

SAVE   CANCEL

Figure 67 Change Data Manager page, DM and loans selected

Select the checkboxes for the loans that have the incorrect data manager. Select the correct data manager from the dropdown menu above the Loans table. Select the **SAVE** button to apply the data manager changes. The Change Data Manager page will reload with the updated data manager information in the Loans table.

Adjustment Actions

NEW ADJUSTMENT   SELECT/DESELECT LOANS   CHANGE DATA MANAGER   DELETE ADJUSTMENT

Data Manager Adjustments - The Table shows how the loans have been   Loans forwarded to another DM

DM ADJUSTMENT ID	DM CODE	NUMBER OF LOANS	EFFECTS	RESPONSE	STATUS	STATUS DATE	COMMENTS
1715647	785	2	2015 -B; 2014 +D		Created	02/03/2018	
1715670	555	2	2015 -B; 2014 +D		Created	02/03/2018	

Figure 68 Loans assigned to another DM (785)

Once you have verified that the changes are correct, you may return to the Adjustment Details screen by selecting the **BACK TO ADJUSTMENT** button.

Data Manager (DM) adjustment

While the case is being prepared, you will not be able to open the DM adjustment page. This is because this page is for the Data Manager to provide their information about the borrower and loans. Once the Data Manager has responded, then you can open the page and view the information provided.

DM adjustment information

Figure 69 DM Adjustment basic information

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

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

Comment:

Figure 70 DM adjustment detail page

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

Comment:

```



```

SAVE   CANCEL

Comments   [+]

School Supporting Documents   [−]

ATTACH FILE

FILE NAME	FILE DESCRIPTION	ACTION
No documents attached		

Data Manager Supporting Documents   [−]

FILE NAME	FILE DESCRIPTION
No documents attached	

Figure 71 DM adjustment detail page continued...

The DM adjustment information consists of the borrower information, loans, the school input on how the loans should be corrected, and the DM input on what the correct loan information is. This page is initially unavailable to the school user. The information from the adjustment will be automatically entered into the record as the school input so there is no reason for the school user to work with the page.

A DM may request additional information from you. When they do, the page for the specified DM adjustment becomes accessible to you. You can at that time update comments and/or attach documents to provide the additional information. Once the DM has responded to the case, you will be able to access the page for all the DM adjustments belonging to that DM. You can then review it. If necessary, you can request clarification about the response from the DM.

DM adjustment workflow actions

Figure 72 DM adjustment processing actions, school user

Providing additional information to Data Manager (see PROVIDING MORE INFORMATION TO DATA MANAGER)

Request clarification from Data Manager (see REQUESTING CLARIFICATION FROM DATA MANAGER)

DM adjustment actions

Figure 73 DM adjustment actions, school user

There are no DM adjustment actions for a school user.

Comments

Figure 74 DM adjustment comments

To add a comment to a DM adjustment, use the Comment field on the DM Adjustment Details page (Figure 74). 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 adjustment (i.e., Data Managers that are associated with a loan in the adjustment, and Federal Student Aid OPD). Adding a comment is optional.

The comment history table in the DM adjustment page lists not just comments added from the DM adjustment page but also from the adjustment page. Comments in the adjustment page will normally also apply to the DM adjustment which is why it is merged into the table; this allows users to view all the comments in one place and not have to switch between adjustment and DM adjustment.

Providing more information to Data Manager

If a data manager determines that more information is necessary before they can produce a response to one or more of your requested adjustments, they may opt to request more information through the eCDR Appeals system if there is still time remaining on the school's 15-day timeframe. If they elect to take this step, you will receive an email notification indicating that a data manager has requested information on an adjustment.

NOTE: The time period in which the data manager may request additional supporting documentation counts against the 15-day timeframe for your NDA submission to the data manager. As an example, if you submit your NDA to the data manager with 10 days left before the 15-day deadline expires, and the data manager reviews your case for 5 days then requests more information, that means you have 5 days left in which to respond to the information request. At the end of the 15-day timeframe, any data manager adjustments with unanswered information requests will automatically be routed back to the data manager to be processed as-is.

Please ensure that you submit your NDA to the data manager as early as possible to avoid complications in providing more information at the last minute.

Figure 75 DM adjustment table with request for additional data

You should receive email notification if a DM requests additional data from you. In addition, any requests for additional information will be listed in your Current status report. Because of the short period in which to respond, it is a good idea to check this report regularly. The report is also the easiest way to get to the DM adjustment that needs a response. Click on the DM adjustment ID in the report and the page will open to the DM adjustment you need.

Figure 76 DM adjustment provide additional data button

At this point you may update the DM adjustment information, add comments, or upload files, to provide the information requested by the DM. When you are ready to send the DM adjustment back, click on the PROVIDE ADDITIONAL DATA button. This opens the provide additional data correspondence page.

Figure 77 DM adjustment provide additional data to DM correspondence page

On this page, you may enter additional text that will be added to the comments history table. When you have entered text, or choose not to, click the **FORWARD TO DATA MANAGER** button. This will send the DM adjustment back to the DM so they can continue with their review.

Requesting clarification from Data Manager

Figure 78 DM adjustment request clarification button

If a data manager has disagreed with one of your adjustments and you require clarification from the data manager regarding their response, click the **REQUEST CLARIFICATION** button at the top right of the page. A Correspondence page will load.

Figure 79 Request clarification correspondence page

Enter details of what you require clarification about in the field and click **REQUEST CLARIFICATION**.

Your clarification request will be forwarded to the data manager, and they will receive an email notification informing them of your request. When they respond, you will also receive a notification via email that the response is ready for viewing in eCDR Appeals.

Reports (for schools)

Figure 80 School reports menu options

Current status

Figure 81 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 provide links 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.

Figure 82 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.

eCDR Appeals
NDA User Guide

CDR Changes

Figure 83 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 their loan records updated in the official LRDR.

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

Figure 84 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 84 shows the organization contact information fields, already be 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

Figure 85 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.
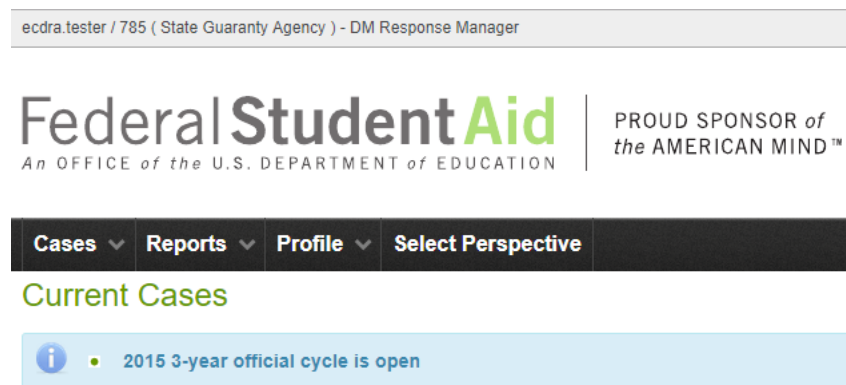
Menus

Figure 86 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 school 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

Case lists
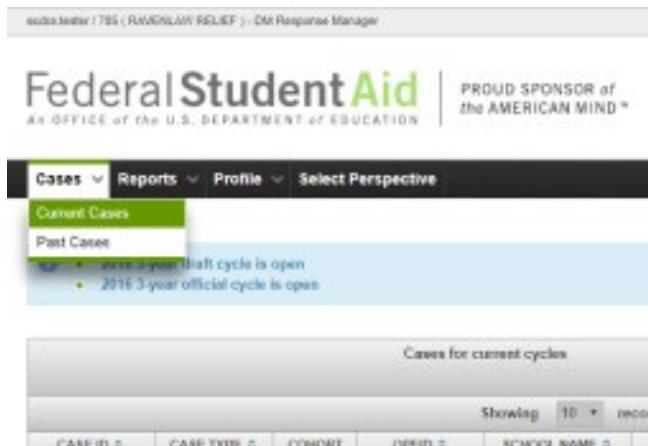
Figure 87 Cases menu options, DM user

Current cases (DM view)

The Current Cases page lists all current cases that have been submitted to your organization for review. When a school submits an NDA for your review, it will appear on this page.

Figure 88 DM user current cases list

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 NDA to review, select the case ID number of the desired case. This will load the Case Details page.

Past cases (DM view)

Figure 89 DM user past cases list

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

Case

Figure 90 Case details page, DM user

The OPEID and name of the school that submitted the case is displayed below the common message area. 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 (DM USER).

Case information

Figure 91 Case information, DM 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.

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

Case workflow actions (DM user)

Case workflow actions typically change the status of the case and become available as appropriate for the case and workflow step. For example, when the NDA is submitted, the "Put

in DM Review" is available. When the case is being reviewed, the "Respond to Case" action is available.
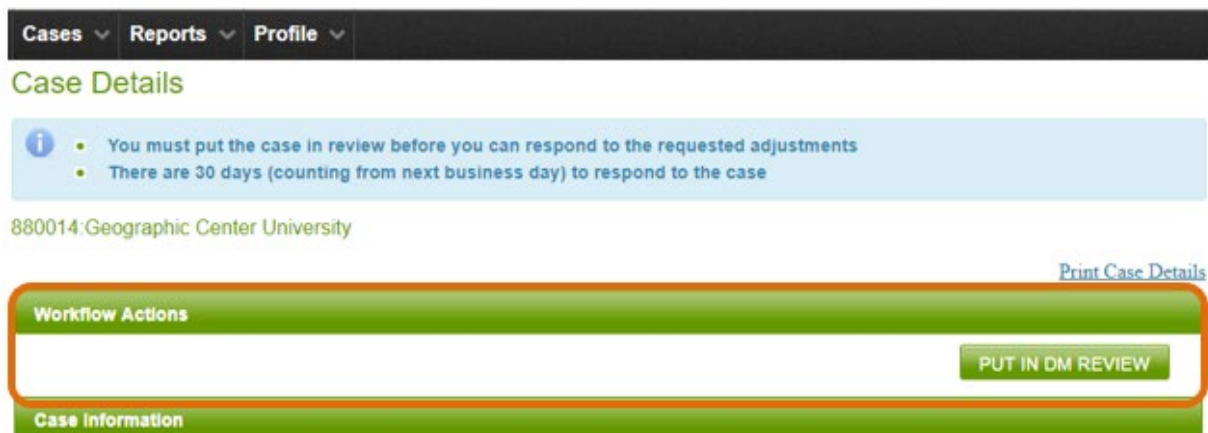
Figure 92 Case workflow actions, DM user

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

Put in DM Review (see REVIEWING A CASE)

Respond to Case (see RESPONDING TO A CASE)

Case actions (DM user)

Figure 93 Case actions, DM user

There are no case actions available for DM users.

Reviewing a case

Figure 94 Workflow action to put case in DM review

When a school submits an NDA containing adjustments that affect you as a data manager, then you will automatically be notified via email about the new NDA. The email will be sent to the email address specified in your eCDR Appeals profile.

To review the NDA, first open it from the Current Cases page. On the Case Details page, the Requested Data Manager Adjustments table will list the adjustments requested by the institution. Review each adjustment, refer to DATA MANAGER (DM) ADJUSTMENT

Responding to a case

Figure 95 Case workflow action, respond to case, DM user

Once all reviews and modifications to an adjustment are complete, a Data Manager Response Manager may send a response to the school. For each Data Manager Adjustment, fill in any necessary input under the "DM Input" section. Indicate whether you agree or disagree to the adjustment by selecting the appropriate option from the "DM Response" dropdown menu. Use the Save button to save your changes.

Once all reviews and modifications to all Adjustments in a case are complete, press the RESPOND TO CASE button to return all your responses to the school.

Data Manager (DM) adjustment

DM adjustment information

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 ⌄

Data Manager Adjustment Detail

BACK TO CASE

880014:Geographic Center University

DM Adjustment Processing Actions

REQUEST ADDITIONAL DATA

DM Adjustment Information

Request Adjustment Id: 1715588

Case Type: 3-YR NDA

SSN: 000000026

Name: Kxxxxxx, Mxxxxxxx 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	ADJI
Yes	Yes	SF	07/14/2008	03/14/2009	06/12/2008	$3,500.00	009420	880014	555	555	7038
Yes	Yes	SU	07/14/2008	03/14/2009	06/12/2008	$6,000.00	009420	880014	555	555	7038
Yes	Yes	SU	03/16/2009	05/23/2009	04/24/2009	$2,333.00	009420	880014	555	555	7038
Yes	Yes	SF	03/16/2009	05/23/2009	04/24/2009	$1,750.00	009420	880014	555	555	7038

Figure 96 DM adjustment details page, DM user

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

DM Input ⊟

DM Response : *   [Select One ▾]

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 Subtract from denominator ▾]

    [Select One ▾] [Select One ▾]

    [Select One ▾] [Select One ▾]

Comment:

[   ]

[SAVE] [CANCEL]

Comments ⊞

School Supporting Documents ⊟

Figure 97 DM adjustment details page, DM user, continued...

The DM adjustment details page contains information about the borrower, the school's input on what corrections should be made, and fields for you, as Data Manager (DM) to enter a response based on the information available to you.

DM adjustment processing (workflow) actions

Figure 98 DM adjustment processing actions, 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:

Requesting additional data from the school (see REQUESTING ADDITIONAL INFORMATION)

Providing clarification to a school (see PROVIDING CLARIFICATION TO SCHOOL)

Providing additional data to FSA (see PROVIDING ADDITIONAL INFORMATION TO FSA)

DM adjustment actions

DM adjustment actions do not affect the status of the DM adjustment. This is the difference between it and the DM adjustment workflow (DM adjustment processing) actions.

Figure 99 DM adjustment actions, DM user

The only action available is for changing the data manager associated with the loans (see CHANGING THE DATA MANAGER)

Comments

Figure 100 DM adjustment comments, DM view

To add a comment to a DM adjustment, use the Comment field on the DM Adjustment 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 adjustment (i.e., Data Managers that are associated with a loan in the adjustment, and Federal Student Aid OPD). Adding a comment is optional.

The comment history table in the DM adjustment page lists not just comments added from the DM adjustment page but also from the adjustment page. Comments in the adjustment page will normally also apply to the DM adjustment which is why it is merged into the table; this allows users to view all the comments in one place and not have to switch between adjustment and DM adjustment.

Supporting documents

Figure 101 Supporting documents, DM user

The DM adjustment page has a section for school supporting documents and Data Manager supporting documents. The school supporting documents are, as the name implies, from the school. You can view them, but you will not be able to attach or remove files from this section.

The section for DM supporting documents is where you can attach documents if you choose to.

Attaching document

Figure 102 Attach DM support document

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

Figure 103 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 document

Figure 104 Remove document button, DM user

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

Changing the Data Manager

Figure 105 Change Data Manager from DM Adjustment Actions

If the loans in the DM adjustment "belong" to another Data Manager, the DM adjustment should be reviewed and responded to by that Data Manager. To send the DM adjustment to that DM, you need to change the Data Manager for the loans. To do that, click the CHANGE DATA MANAGER button in the DM Adjustment Actions section.

Figure 106 Changing DM Code for selected loan

Select the DM code you want to send the loans to from the drop-down box. Put a check in the checkboxes for the loans you want to send to the DM. When you have selected all the loans you want to change, click **SAVE**.

Once the system updates the loans, you will be taken to the Current Cases page. If you forwarded all the loans for all the DM adjustments to the new DM, you will not need to review the case and it will not show up in your current cases list anymore.

Requesting additional information

Figure 107 Requesting additional data button, DM user
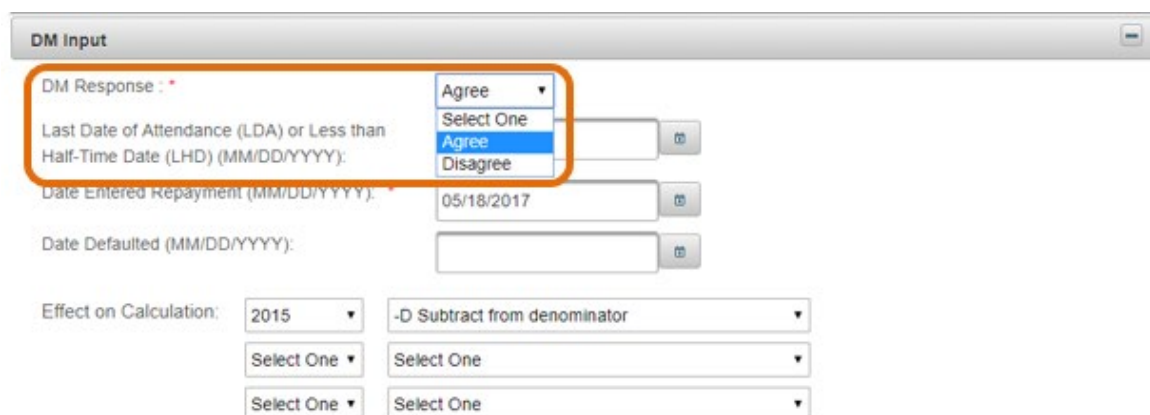
The Data Manager Adjustment Details page allows you to request more data from the institution. Select the **REQUEST ADDITIONAL DATA** button at the top right of the screen to request more information from the school.

Figure 108 Requesting additional data correspondence page, DM user

You will be provided with a Correspondence page to specify what information you are requesting from the school. Click the **REQUEST MORE DATA** button to send the request to the school.

Making a response
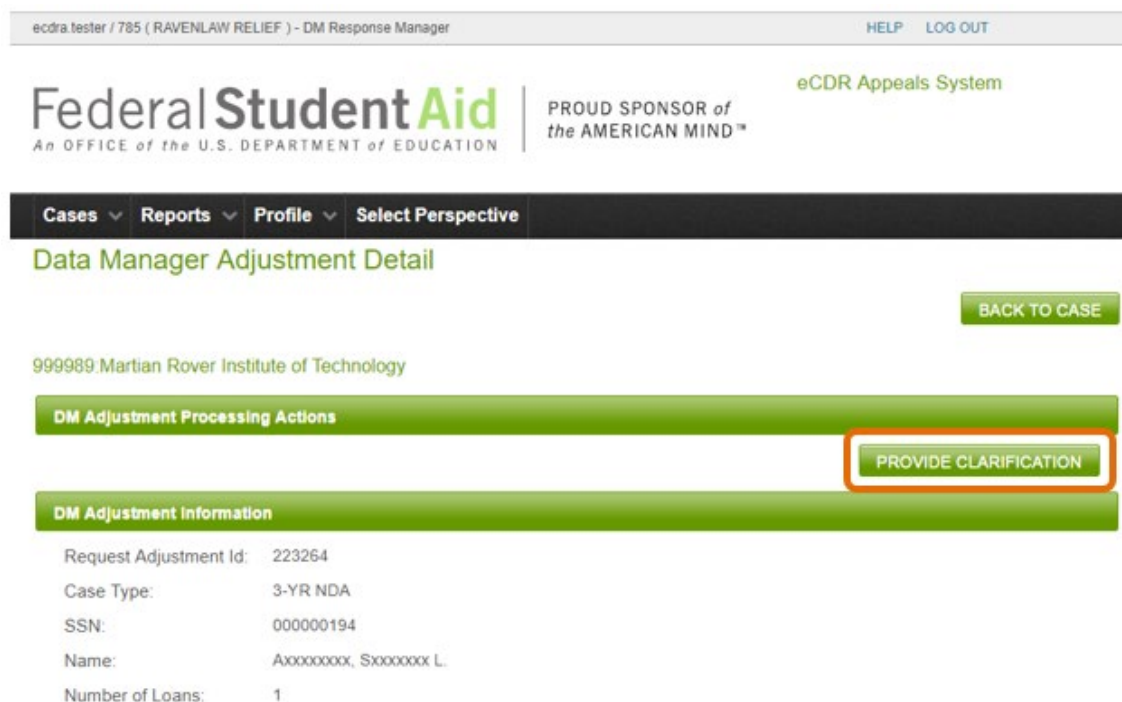
Figure 109 DM response input

Select "Agree" if you concur with the school regarding the effect on calculation for the borrower. Select "Disagree" if not. Then click the **SAVE** button at the bottom of the page.

Providing clarification to school

Figure 110 Provide clarification button, DM user

If a school requests clarification about your response to a DM adjustment, you will receive a notification and the **PROVIDE CLARIFICATION** button will become available in the DM Adjustment Processing Actions section.

If you need to include a document for the clarification, you need to attach it to the DM adjustment first before clicking the button to provide clarification. Once you have attached all the documents you wanted to include, click the **PROVIDE CLARIFICATION** button. A Correspondence page will load.

Figure 111 Provide clarification correspondence page, DM user

Enter your response to the school in the text field, and click **RETURN CLARIFICATION**. Your response will be sent to the school, and the school will receive an automatic email notification informing them that you have replied.

Providing additional information to FSA

Figure 112 Provide additional data button, DM user

If FSA requests additional data, you will receive notification and the **PROVIDE ADDITIONAL DATA** button will become available in the DM Adjustment Processing Actions section.

If you need to attach files to provide additional data, do that before clicking the processing actions button. When you have attached all the files you needed to, click the Provide Additional Data button. A Correspondence page will load.

Figure 113 Provide additional data correspondence page, DM user

Enter text you deem relevant to the requested information into the text box. When you are done, click the FORWARD TO CASE WORKER button. This will send your response to FSA. FSA will be notified via email that you have responded.

Reports (for Data Managers)
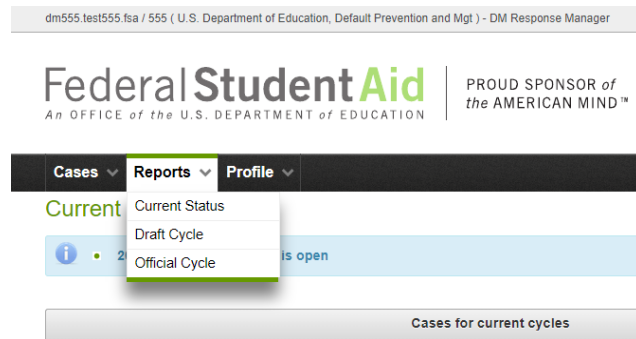
Figure 114 Reports menu options, DM user

Current Status (for DM)
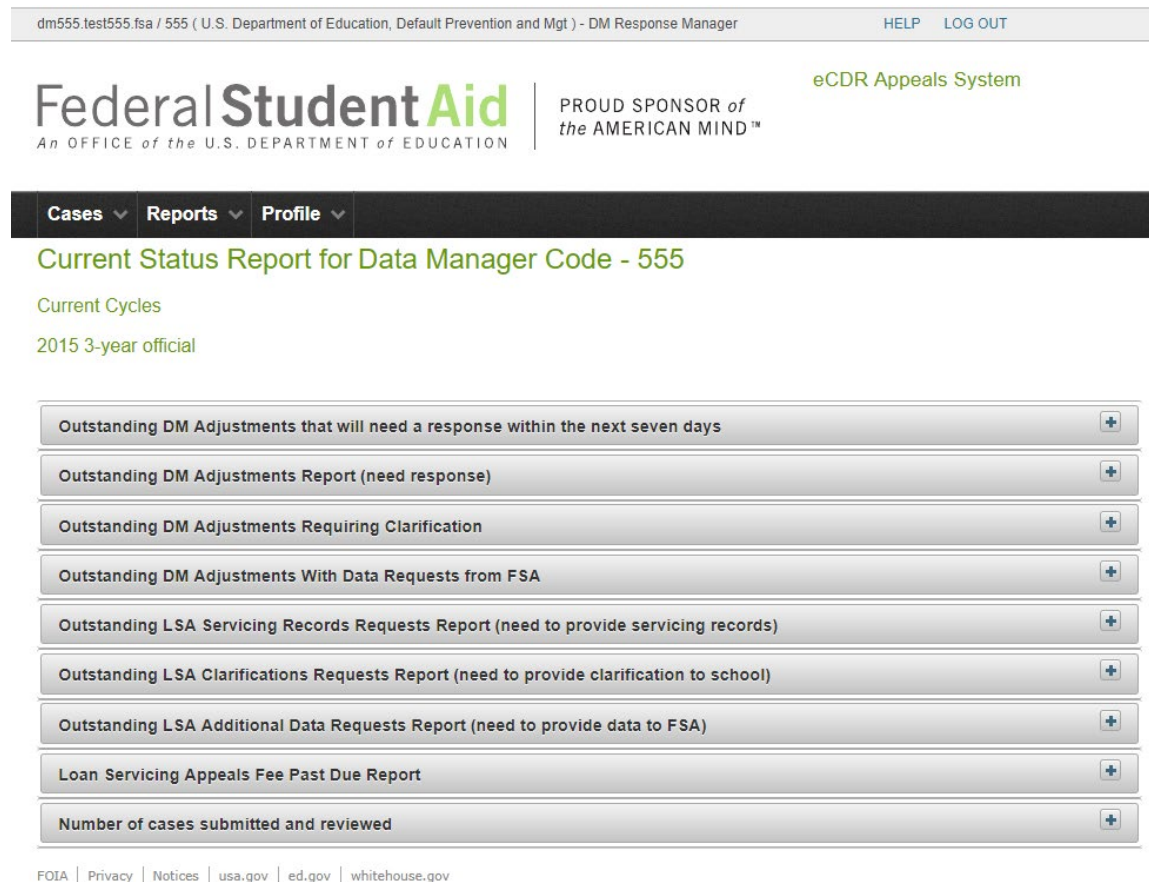
Figure 115 Current status reports page, DM user

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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.

Figure 116 Current status reports page, tables expanded, DM user

Outstanding DM Adjustments that will need a response with 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.

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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.

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Draft Cycle (for DM)

Figure 117 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.

Figure 118 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)

Figure 119 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 cases from the selected official cycle.

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 120 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
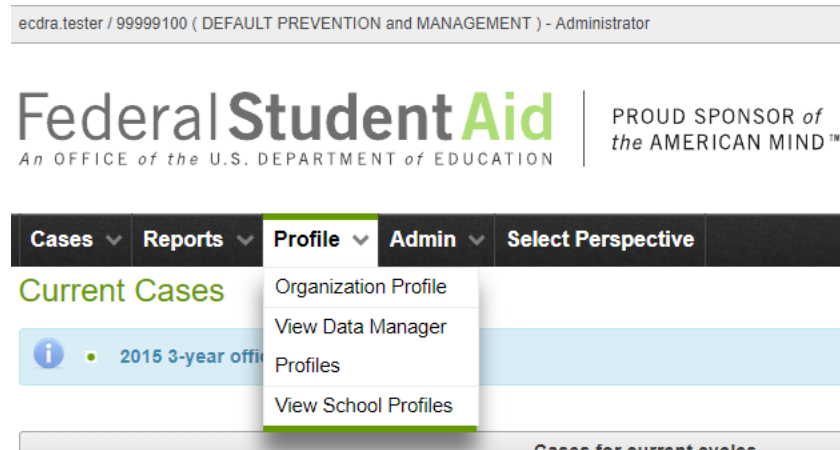
Figure 121 Profile menu options, FSA user

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Organization Profile

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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: *	DEFAULT PREVENTION and MANAGEMENT
Address: *	830 First Street, NE
City: *	WASHINGTON
State:	DC - District of Columbia
Zip:	20202
Country:	USA
Organization Email: *	ecdra.admin@ed.gov
Alternate Email:	ecdra.other.admin@ed.gov
Phone Number: *	202-555-1212
Alternate Phone:	

Figure 122 FSA organization contact information

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

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
Jasons, Timo	jas@test.test	202-333-2222
casemanger, FSA	fsa.casemanager@ed.test	202 377 4444
Caseworker, FSA	fsa.caseworker@ed.est	202-377-5555

NEW CONTACT

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Figure 123 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.

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View Data Manager Profiles

Figure 124 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.

Figure 125 Data Manager profile page

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View School Profiles

Figure 126 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.

Figure 127 School profile page

Perspectives

Figure 128 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
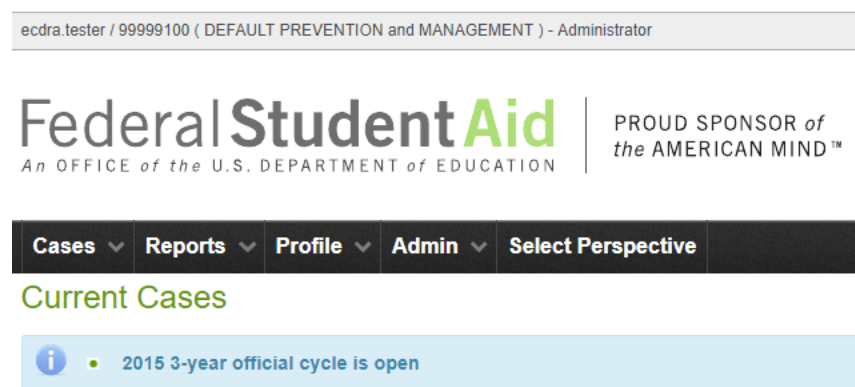
Figure 129 Menu bar, FSA user

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.
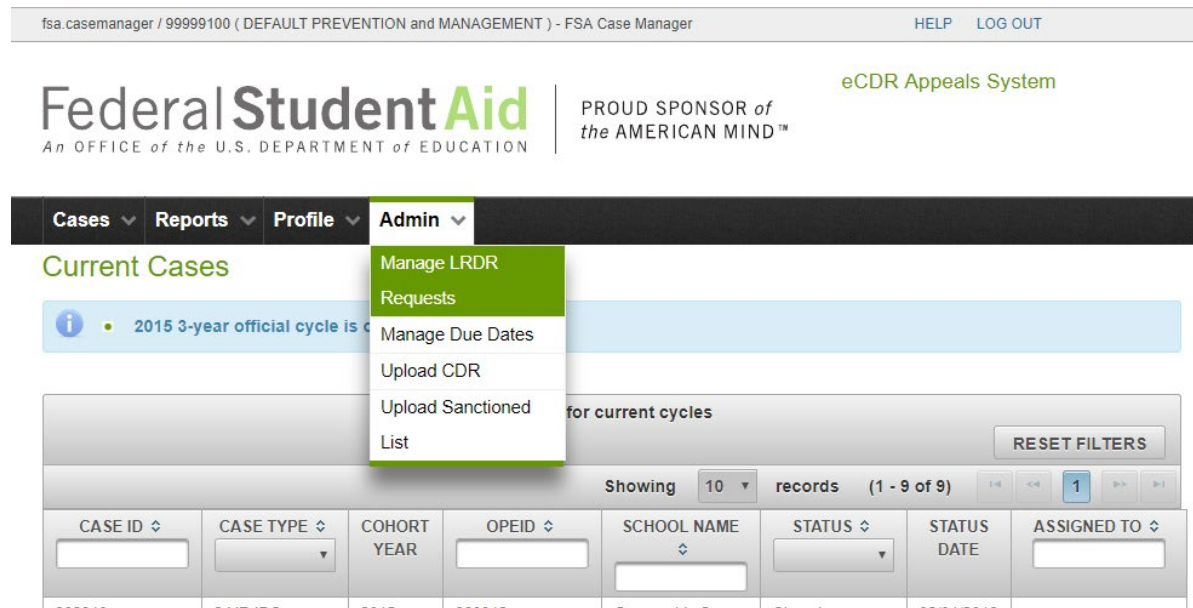

Figure 130 Manage LRDR requests menu option, FSA user

The eCDR Appeals system has an automated mechanism that generates 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.
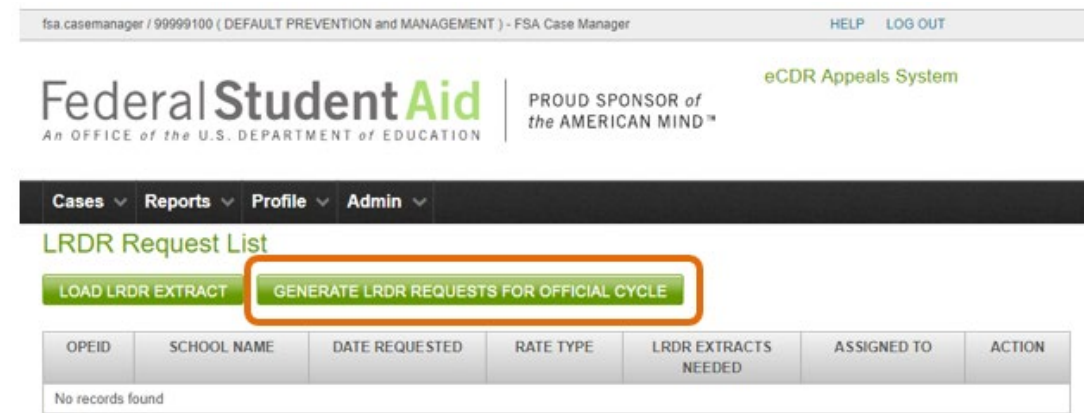
Figure 131 Generate LRDR requests button

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

Figure 132 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.

Figure 133 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.
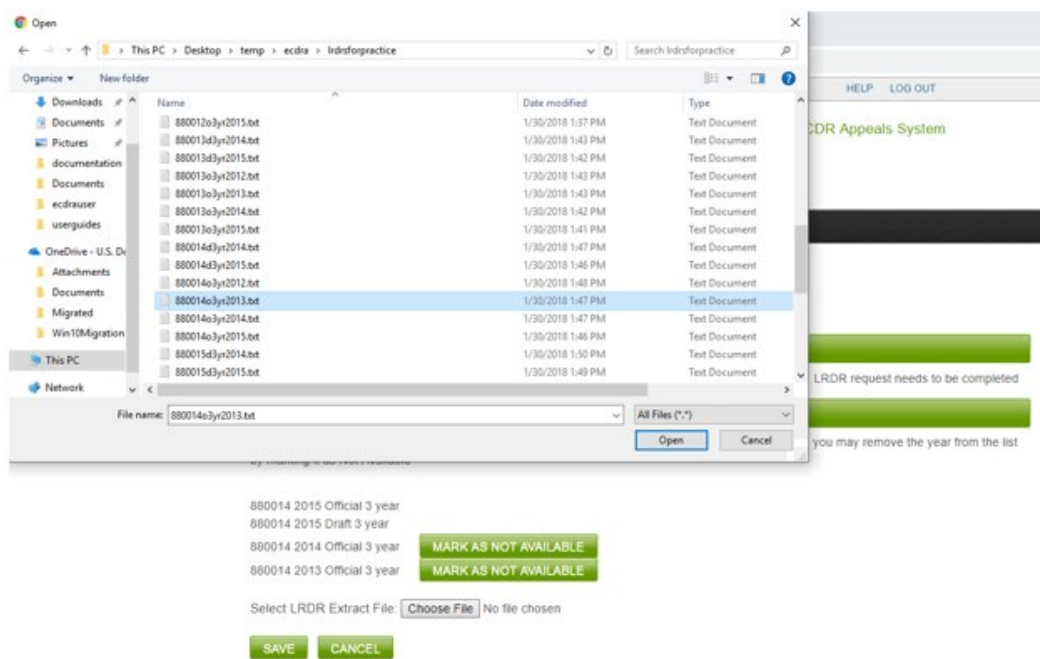
Figure 134 Browse for file to upload

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

Figure 135 LRDR extract file selected

The selected file's name will be displayed besides the **CHOOSE FILE** (or **BROWSE**, depending on your web browser) button. Click **SAVE** to upload it. Upload normally should take no more than a few seconds but 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.

Figure 136 LRDR file failed to load
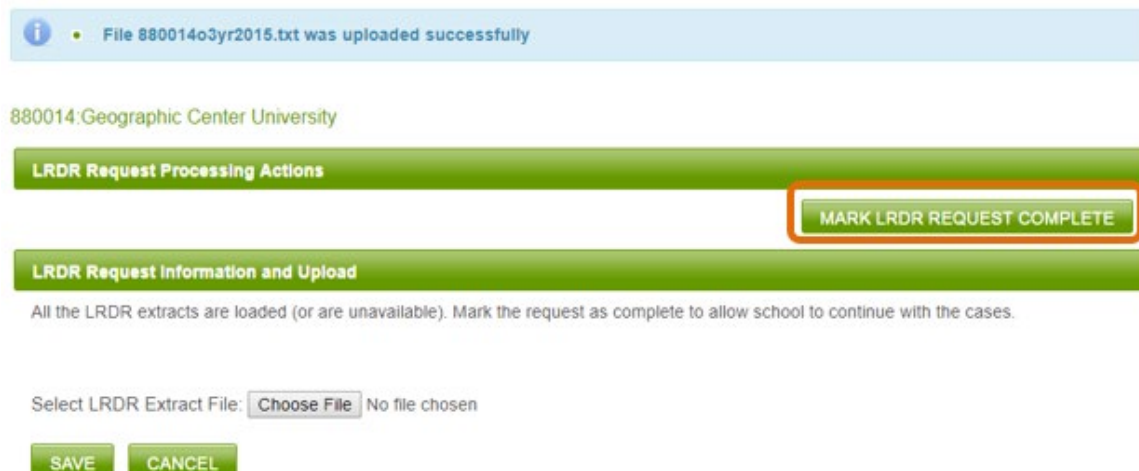
If there was a problem with the LRDR file, an error message will be displayed at the top of the page.

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
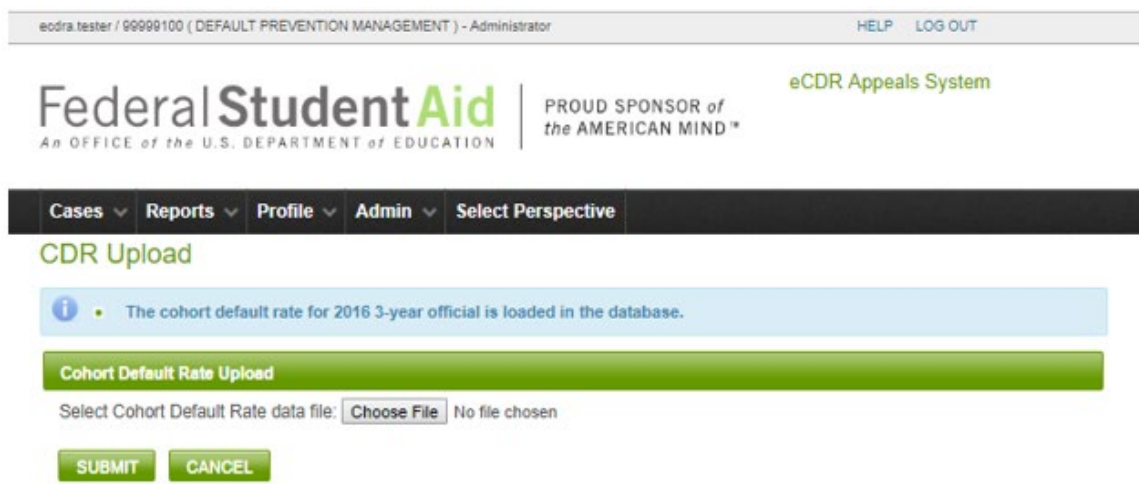
Figure 137 Mark LRDR request as complete

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.

Cohort Default Rates (CDR)

Figure 138 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 S UBMIT 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.

Case lists

Current cases

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

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Current Cases

ⓘ   • 2015 3-year official cycle is open

	Cases for current cycles						
							RESET FILTERS
			Showing 10 ▼ records	(1 - 9 of 9)	∣◁ ◁◁ **1** ▷▷ ▷∣		
CASE ID ⬍	CASE TYPE ⬍	COHORT YEAR	OPEID ⬍	SCHOOL NAME ⬍	STATUS ⬍	STATUS DATE	ASSIGNED TO ⬍
303910	3-YR IDC	2015	880012	Geographic Center University	Closed	02/01/2018	
303909	3-YR IDC	2015	880011	Geographic Center University	Closed	02/01/2018	
303915	3-YR UDA	2015	880012	Geographic Center University	Closed	02/02/2018	
303913	3-YR NDA	2015	880012	Geographic Center University	Closed	02/01/2018	
303919	3-YR NDA	2015	880014	Geographic Center University	Awaiting LRDR	02/02/2018	
303911	3-YR NDA	2015	880011	Geographic Center University	Closed	02/01/2018	
303916	3-YR LSA	2015	880013	Geographic Center University	Caseworker review	02/01/2018	ecdra.tester ▼ ASSIGN
303912	3-YR LSA	2015	880011	Geographic Center University	Being prepared	02/01/2018	

Figure 139 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 NDA 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. If the case is assigned to somebody else, you will only be able to see the most basic information when you open the case.

Figure 140 Self-assign button

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.

Figure 141 Available FSA assignees

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. No matter what role you have though, if the case is not assigned to you, you will only be able to view the basic case information.

Figure 142 Information available if case is assigned to somebody else

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Past cases

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Cases ⌄   Reports ⌄   Profile ⌄   Admin ⌄   Select Perspective

Past Cases

Cases for past cycles

RESET FILTERS

Showing [10 ⌄] records   (1 - 10 of 107) |◄ ◄ **1** 2 3 4 5 6 7 8 9 10 ►► ►|

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

Figure 143 Past cases page, FSA user

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

Case

Case information

Figure 144 Case details page, FSA user view

The OPEID and name of the school that submitted the case is displayed below the common message area. 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 (FSA USER).

Figure 145 Case details page, FSA user view (continued)

Below the workflow actions section is the Case Information section which includes the basic information about the case (ID, status, etc), certification, and comments.

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 146 Case workflow actions section, FSA user

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

Complete caseworker review (see COMPLETE CASEWORKER REVIEW)

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

FSA review complete (see COMPLETE CASE MANAGER REVIEW) – available during case manager review

Forward to Case Manager (see COMPLETE CASEWORKER DECISION REVIEW) – available during caseworker decision review

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

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

Case actions (FSA user)

Case actions do not affect the workflow and will not change the status of the case. The system makes the appropriate actions available based on the status of the case.
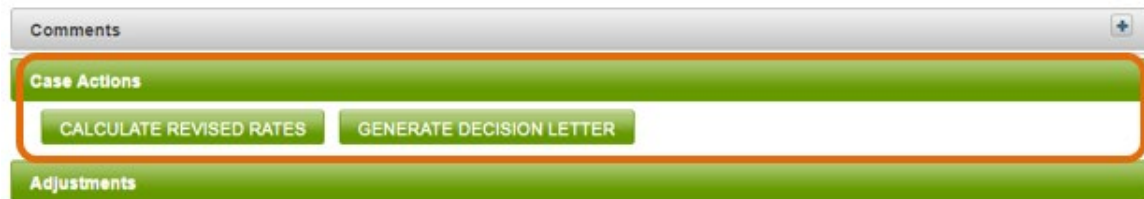
Figure 147 Case actions section, FSA user

The list of all case actions available for a school user is listed below:

Calculate Revised Rates (see CALCULATE REVISED RATE)

Generate Decision Letter (see CREATE DECISION LETTER)

Perform caseworker review

After a school submits a perfected NDA, Federal Student Aid OPD will automatically be notified via email that the NDA 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".

Figure 148 Current cases with case ready for FSA review

To review an NDA the case must first be assigned to you, either self-assignment or a case manager or admin assigning the case to you. When the NDA 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.

Complete caseworker review

Figure 149 Case workflow actions, caseworker review

When you have reviewed all the DM adjustments (see COMPLETE DM ADJUSTMENT FSA REVIEW), you can complete the caseworker review by clicking the **COMPLETE CASEWORKER REVIEW** button in the Workflow Actions section of the Case Details page.

Figure 150 Message if caseworker review cannot be completed yet

The system does a validation check to ensure all the DM adjustments have been reviewed. If there are any not reviewed, error messages will be displayed identifying those that still need to be reviewed.

If the validation does not find any issues, the case becomes ready for case manager review.

Perform case manager review

Figure 151 Current cases with case available for case manager review

The case must first be assigned to a case manager. Case managers or admins may assign the case to themselves or assign it to another case manager or admin. When it is assigned for the first time, the case automatically goes into "Case manager review" status. Case managers or admins may re-assign the case if needed.

The reviewer looks at the same data as the caseworker so most of the information will be in the adjustment and DM adjustments. Refer to the Adjustment section and the Data Manager (DM) adjustment for more detailed description in performing the review. The reviewer may send the case back to the caseworker reviewer if additional work needs to be done. If the reviewer determines that the review was done correctly and completely, the case manager review can be completed.

Return to caseworker for re-review

Figure 152 Back to case worker workflow action

You must identify the DM adjustments that the caseworker needs to look at again before sending the case back (see COMPLETE CASEWORKER REVIEW). The Complete caseworker review of the DM adjustment section will describe how to do this. Once all the DM adjustments have been identified, click the **BACK TO CASE WORKER** button. This puts the case back in Caseworker review and re-assigns the caseworker who completed the review back to the case.

Other caseworkers may self-assign the case to themselves or the case manager may re-assign the case to another caseworker if, for example, the original caseworker is not available.

Complete case manager review

Figure 153 Complete case manager review workflow action

If there are no adjustments that need to be re-reviewed, click the **FSA REVIEW COMPLETE** button in the Workflow Actions section. When it completes, the case becomes available for caseworker decision review.

Perform caseworker decision review

Figure 154 Current cases with case available for caseworker decision review

To perform the caseworker decision review, the case must first be assigned to you, either through self-assignment or a case manager or admin assigning the case to you. If the NDA is not assigned, it automatically goes into 'Caseworker Decision Review' status when it gets assigned. The case may be re-assigned after that, but the status will not change. Open the case by clicking on the case ID

Figure 155 Case actions for decision review

The decision review is when you can determine what effect the appeal has on the school's default rate. If the appeal causes a revision in the default rate, you calculate the new rates as described in the CALCULATE REVISED RATE section. This revised rate will go in the decision letter. The CREATE DECISION LETTER section describes how to create the decision letter.

Calculate revised rate

Figure 156 Calculate revised rates case action

To input the updated CDR data into this case, click on the CALCULATE REVISED RATES button. This will load the Revised Rate Calculation page.

Figure 157 Revised rates calculation page

The Effects on Calculation table in the Revised Rates Calculation page summarizes the effect on calculation of all the adjustments in the case. The adjustments can be for any of the three most recent cohort years, i.e. current cohort year, previous cohort year, and the two-year previous cohort year.

Figure 158 Updating revised rates

The Revised Rates Input table allows you to enter the updated numerator, denominator, CDR and non-averaged CDR for the current and previous two cohort years. After entering the updated information, click the **SAVE** button. This will update the NDA case file with the new CDR data. To return to the Case Details page without saving any updates, click **CANCEL** or the **BACK TO CASE** button.

The Borrower Effects on Calculation table lists all the borrowers that were included in the case and how adjustments to their loans affect the default rate.

Note: No information is transmitted between eCDR Appeals and NSLDS. The revised rates in eCDRAppeals is not sent over to NSLDS. It is documented in a decision letter which is provided to the school as proof that their cohort default rates were updated based on provided evidence.

Create decision letter

Figure 159 Generate decision letter case action

To generate a decision letter, click on the GENERATE DECISION LETTER button on the Case Details page. This will load the Create Decision Letter page.

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Create Decision Letter

Is the school an averaged school?   No

Is the school currently under sanction?   No

Did the school lose the adjustment or appeal? No

Is the school subject to sanction?   No

SAVE   CANCEL

Figure 160 Preliminary questions to create decision letter

Several questions will be presented which can be answered with YES or NO. The default answer is NO. To change it, click on the button and it will change to YES. Click again to change it. When you have answered all the questions, click SAVE to create the decision letter. If you are not ready to create the decision letter at this time, click CANCEL to return to the Case Details page.

These questions help prepare the template by identifying what verbiage should be included in the letter. For example, a school under sanction will have additional text about sanctions that a school not under sanction will not need. The questions are meant to help and are not meant to be a strict requirement. You can directly edit the text in the letter (see EDIT DECISION LETTER) if you picked the wrong answers here and the template did not have the right text. Finally, if you really need to, you can discard the decision letter and return to this page to start a new one (see RESET DECISION LETTER).

See the EDIT DECISION LETTER section for a more detailed description of editing the decision letter. The PREVIEW DECISION LETTER section describes how to preview the decision letter.

Complete caseworker decision review

Print Case Details

Workflow Actions

FORWARD TO CASE MANAGER

Case Information

Figure 161 Complete caseworker decision review workflow action

When all changes to the CDR data have been input and the decision letter has been prepared, the case may be submitted to a Case Manager for final review and closure. On the Case Details page, click the FORWARD TO CASE MANAGER button. This will place the case in "Available for Case Manager Decision Review" status.

Perform case manager decision review

Figure 162 Current cases with case available for case manager decision review

To perform the case manager decision review, the case must first be assigned to you, either through self-assignment or a case manager or admin assigning the case to you. If the NDA is not assigned, it automatically goes into 'Case Manager Decision Review' status when it gets assigned. The case may be re-assigned after that, but the status will not change. Open the case by clicking on the case ID

The Case Manager decision review is the final stage in the NDA process before the case is closed. In this stage, the Case Manager does a final QC review of the cohort default rate calculation data and the decision letter before closing the case.

Figure 163 Case actions for case manager decision review

To review the CDR calculation see CALCULATE REVISED RATE.

To perform a final review of the decision letter, click on the **GENERATE DECISION LETTER** button on the Case Details page. This will bring up the Decision Letter page. You may make any necessary changes to the decision letter. Refer to Edit decision letter on how to edit the decision letter. You may preview the PDF of the letter by clicking **PREVIEW DECISION LETTER**. The date and signature will not be added until the letter is finalized.

Return to caseworker for decision re-review

Figure 164 Return to caseworker decision review workflow action

If the NDA needs further attention from the Case Worker, it may be returned to the Case Worker by clicking on the **BACK TO CASE WORKER** button on the Case Details page.

Finalize NDA

If your QC review of the revised CDR calculations and decision letter is successful, you can close the case. Before doing that, you must finalize the decision letter.

Finalize decision letter

Figure 165 Finalize button for decision letter

If the letter is ready to be finalized, click the FINALIZE DECISION LETTER button on the Decision Letter page.

NOTE: Once the letter is finalized, it can no longer be modified. Ensure that all the sections are correct before finalizing.

Figure 166 Decision letter finalized, button disabled

After the letter is finalized, it may be viewed, downloaded or printed by clicking the **PREVIEW DECISION LETTER** button. Since the letter was finalized, it will now display a date and signature.

Close case

Figure 167 Workflow action to close case

To close the case, click the **CLOSE CASE** button at the top of the Case Details page. A confirmation page will load, prompting you to verify that the case should be closed.

Figure 168 Confirmation page to close NDA

To verify, click Oᴋ. To keep the case open, assuming further review may be needed, click Cᴀɴᴄᴇʟ.

Once the case is closed, an automatic notification will be emailed to the school and all affected data managers, informing them that a decision has been made. They will have the ability to log in to eCDR Appeals to view the closed case and print the decision letter and case summary.

Adjustment

Adjustment information

Figure 169 Adjustment details

The basic information for the adjustment includes the ID, the case type, and the borrower name and SSN. The school's requested adjustment details are in the school input section.

Comments	+
Supporting Documents	−

FILE NAME	FILE DESCRIPTION
No documents attached	

Adjustment Actions

No available adjustment actions

Data Manager Adjustments - The Table shows how the loans have been packaged according to Data Managers

DM ADJUSTMENT ID	DM CODE	NUMBER OF LOANS	EFFECTS	RESPONSE	STATUS	STATUS DATE	COMMENTS
1715588	555	4	2015 -D	Agree	In case worker review	02/02/2018	

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Figure 170 Adjustment details, DM adjustment table

The most useful section in the adjustment details page is the Data Manager Adjustments table. This shows how many data managers are associated with the borrower, how many loans each are responsible for, and how they responded to the adjustment.

All the other information on this page is available in the DM adjustment page and for the most part, the review will be done at the DM adjustment level.

Adjustment workflow actions

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

Adjustment actions

There are no adjustment actions available to the FSA user.

Data Manager (DM) adjustment

DM adjustment information

fsa.caseworker / 99999100 (DEFAULT PREVENTION and MANAGEMENT) - FSA Case Worker   HELP   LOG OUT

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Data Manager Adjustment Detail

[BACK TO ADJUSTMENT]

880014:Geographic Center University

DM Adjustment Processing Actions

[REQUEST MORE DATA FROM DM]   [FSA REVIEW COMPLETE]

DM Adjustment Information

Request Adjustment Id: 1715588

Case Type: 3-YR NDA

SSN: 000000026

Name: Kxxxxxx, Mxxxxxxx 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	ADJUSTMENT ID
Yes	Yes	SF	07/14/2008	03/14/2009	06/12/2008	$3,500.00	009420	880014	555	555	703824
Yes	Yes	SU	07/14/2008	03/14/2009	06/12/2008	$6,000.00	009420	880014	555	555	703824
Yes	Yes	SU	03/16/2009	05/23/2009	04/24/2009	$2,333.00	009420	880014	555	555	703824
Yes	Yes	SF	03/16/2009	05/23/2009	04/24/2009	$1,750.00	009420	880014	555	555	703824

Figure 171 DM adjustment details, borrower and loan information

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	A
Yes	Yes	SF	07/14/2008	03/14/2009	06/12/2008	$3,500.00	009420	880014	555	555	7
Yes	Yes	SU	07/14/2008	03/14/2009	06/12/2008	$6,000.00	009420	880014	555	555	7
Yes	Yes	SU	03/16/2009	05/23/2009	04/24/2009	$2,333.00	009420	880014	555	555	7
Yes	Yes	SF	03/16/2009	05/23/2009	04/24/2009	$1,750.00	009420	880014	555	555	7

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

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

Comment:

Figure 172 DM adjustment details, school and DM inputs

Comment:

[SAVE] [CANCEL]

| Comments | + |

School Supporting Documents −

FILE NAME	FILE DESCRIPTION
No documents attached	

Data Manager Supporting Documents −

FILE NAME	FILE DESCRIPTION
No documents attached	

DM Adjustment Actions

No available dmAdjustment actions

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Figure 173 DM adjustment details, comments and supporting documents

DM adjustment processing (workflow) actions

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

Request more data from DM (see REQUEST ADDITIONAL INFORMATION FROM DATA MANAGER)

FSA review complete (see COMPLETE DM ADJUSTMENT FSA REVIEW)

DM adjustment actions

There are no DM adjustment actions available to the FSA user

Comments

STATUS	COMMENT	TIMESTAMP	USER
In case worker review	In case worker review	01/29/2018 16:57:46	fsa.caseworker
In case worker review	In case worker review	01/29/2018 16:57:46	fsa.caseworker
Available for case worker	Available for case worker	01/29/2018 16:56:15	88001000.user
Available for case worker	Available for case worker	01/29/2018 16:56:15	88001000.user
Certified	Certified	01/29/2018 16:55:58	88001000.user
Certified	Certified	01/29/2018 16:55:58	88001000.user
DM responded	DM responded	01/26/2018 16:47:32	System User
Reviewed by DM	but anything other than being exactly on time, I can do	01/26/2018 16:45:45	ecdra.tester
DM review	DM review	01/26/2018 16:43:48	System User
Submitted	Submitted	01/24/2018 16:36:51	System User
Submitted	Submitted	01/24/2018 16:36:50	88001000.user
Submitted	Submitted	01/24/2018 16:36:50	88001000.user
Certified	Certified	01/24/2018 16:36:37	88001000.user
Certified	Certified	01/24/2018 16:36:37	88001000.user
Created	Please don't expect that from me	01/22/2018 16:26:41	88001000.user
Created	I'm not always on time	01/22/2018 16:26:21	88001000.user

Figure 174 Comments section, FSA user

To add a comment to a DM adjustment, use the Comment field on the DM Adjustment 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 adjustment (i.e., Data Managers that are associated with a loan in the adjustment, and Federal Student Aid OPD). Adding a comment is optional.

The comment history table in the DM adjustment page lists not just comments added from the DM adjustment page but also from the adjustment page. Comments in the adjustment page will normally also apply to the DM adjustment which is why it is merged into the table; this allows users to view all the comments in one place and not have to switch between adjustment and DM adjustment.

Request additional information from Data Manager

Figure 175 DM Adjustment worfklow action for FSA user, request more data from DM

After reviewing the DM input (including comments and documents), you may find it necessary to request further information from a data manager. To request more information, click the **REQUEST MORE DATA FROM DM** button in the DM Adjustment Processing Actions section.

Figure 176 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. Click the **REQUEST MORE DATA FROM DM** button to send the request to the Data Manager.

Complete DM adjustment FSA review

Figure 177 DM Adjustment workflow action for FSA user, FSA review complete

If the information and the DM response to the school look fine, click the FSA Review Complete button to finish the review. This changes the status of the DM adjustment to "Case worker review complete".

Figure 178 DM Adjustment table, status showing case worker review is completed

You can then review any other DM adjustment that belongs to the same adjustment. Once you have completed review for all the DM adjustment in the adjustment, the adjustment status will also change to "Case worker review complete".

Case manager review

Figure 179 Identifying DM adjustment for caseworker re-review

If you determine that a DM adjustment needs to be re-reviewed by the case worker, you mark the DM adjustment by clicking the **CASEWORKER RE-REVIEW NEEDED** option button in the FSA Input sub-section. This is below the School Input and DM Input sections, just above the Comment text box.

When you have identified all the DM adjustments that need to be re-reviewed, then you can send the case back to the caseworker (see RETURN TO CASEWORKER FOR RE-REVIEW).

If there is nothing to re-review, then no actions are necessary in the DM adjustment. You can complete the review from the case details page (see COMPLETE CASE MANAGER REVIEW).

Decision letter

Edit decision letter

Figure 180 Decision letter page

The decision letter is divided into various sections, which can be edited independently of each other.

Figure 181 Decision letter sections

To modify a section of the letter, click on the **EDIT** button under that section. This will load a page with an editing box for the section (Figure 182) in which you may make any necessary changes.

Figure 182 Editing decision letter section

After you are done updating the section, click SAVE to return to the Decision Letter page. If you wish to return without saving your changes, click CANCEL.

Reset section

Figure 183 Decision letter section reset buttons

If you wish to reset a section to the default text, click on the **RESET** button under that section. You will lose any changes you made to the section. The preliminary questions will be enabled allowing you to do some general customization of the standard template text.

Reset decision letter

Figure 184 Decision letter reset button

In some cases, you may wish to reset the text of the entire letter. For example, you started the letter with the presumption that it was not subject to sanction and later realized that the school was going to be subject to sanction. It is usually easier to reset the letter and start from scratch than to edit each section to change the verbiage to mention the sanction. To reset the letter, click on the **RESET DECISION LETTER** button. You will lose all the changes that you have previously made. The preliminary questions will be enabled allowing you to do some general customization of the standard template text.

Preview decision letter

Figure 185 Decision letter preview button

To see how the letter will look as a PDF, click the **PREVIEW DECISION LETTER**. A new window will open, loading the PDF decision letter. Note that the date and signature will not appear until the letter is finalized.
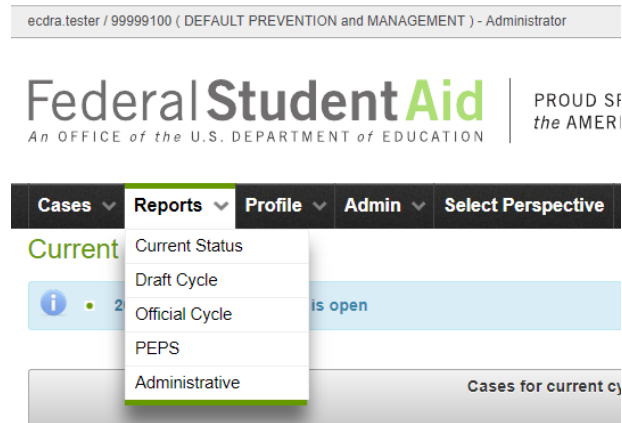
Reports for FSA

Figure 186 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.

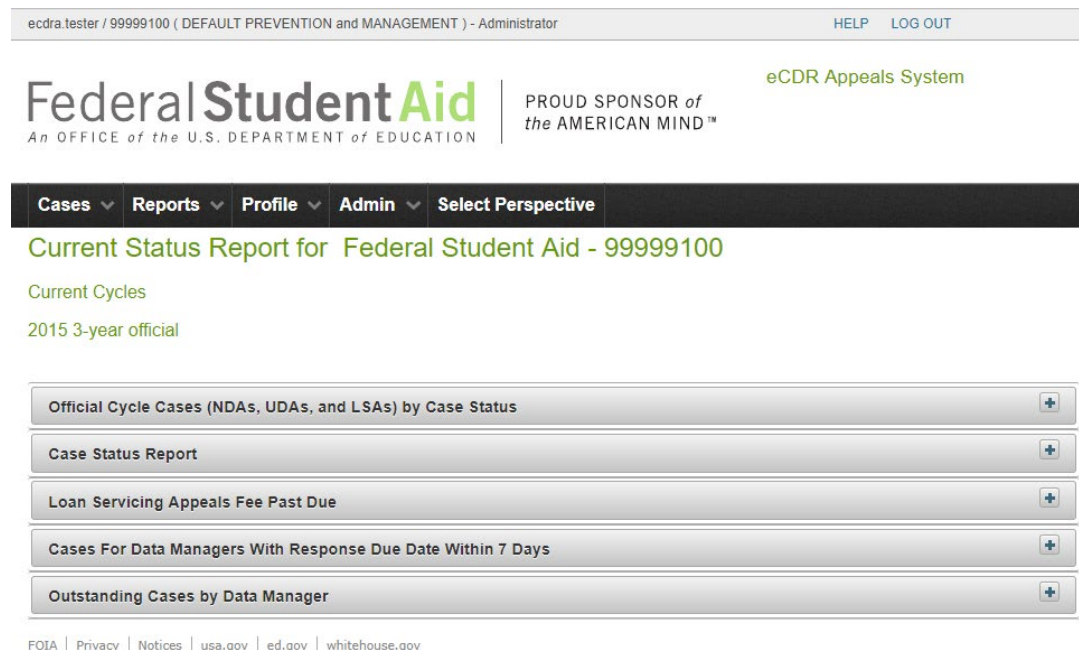## Current Status (for FSA)

Figure 187 Current status reports page, reports collapsed

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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 188 Current status reports page, some reports expanded

Draft Cycle (for FSA)

ecdra.tester / 99999100 (DEFAULT PREVENTION and MANAGEMENT) - Administrator   HELP   LOG OUT

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eCDR Appeals System

Cases ⌄   Reports ⌄   Profile ⌄   Admin ⌄   Select Perspective

Draft Cycle Report for Federal Student Aid - 99999100

Select cycle for the reports   [Select One   ▼]   [SUBMIT]

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Figure 189 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 Sᴜʙᴍɪᴛ to generate the reports.

Figure 190 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.

Figure 191 Draft cycle reports page, some reports expanded

Official Cycle (for FSA)

Figure 192 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.

Figure 193 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.

Figure 194 Official cycle reports, some reports expanded

PEPS

Figure 195 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.

Figure 196 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.

Figure 197 PEPS report page, report expanded

Administrative

Figure 198 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) * | 1/1/18 |

To date (inclusive) * | 2/28/18 |

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

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Figure 199 Administrative reports page, some reports expanded
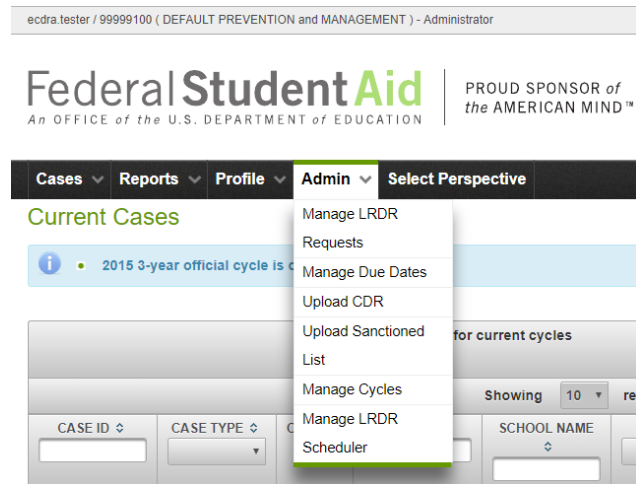
Admin

Figure 200 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.
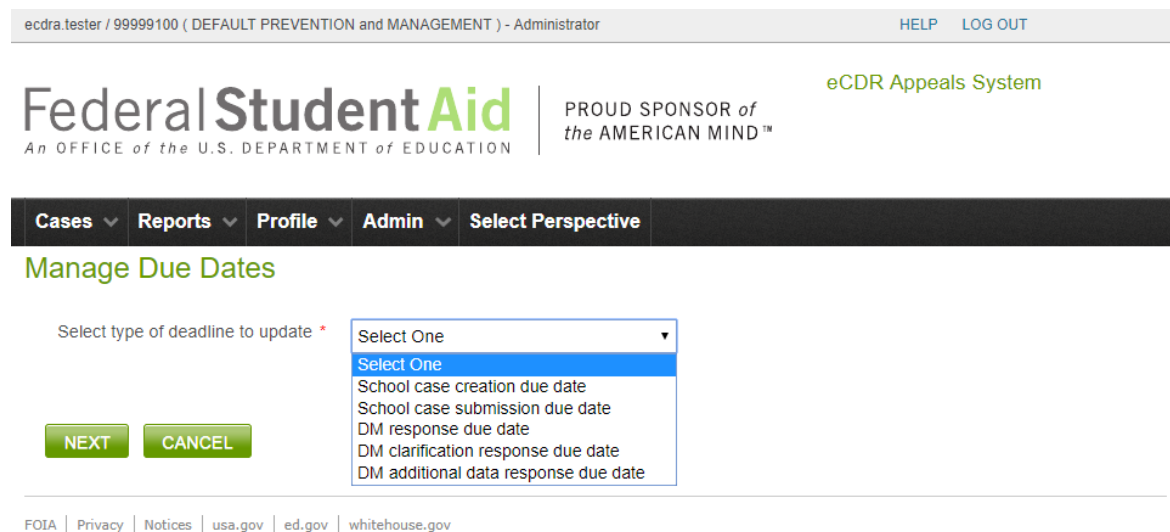
Manage Due Dates

Figure 201 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

Figure 202 Extending deadline for creating NDA

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

Figure 203 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

Figure 204 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 * [Select One ▼]

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 205 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 * [Select One ▼]

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 206 Extending deadline for DM additional data response

eCDR Appeals
NDA User Guide

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

Figure 207 Sanctioned list upload page

The sanctioned (schools) list is not used for the NDA and will not be discussed here.

Manage Cycles

Figure 208 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.
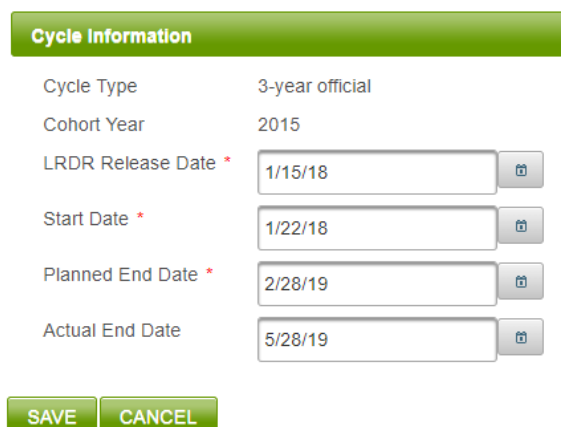
Update or close cycle

Figure 209 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.
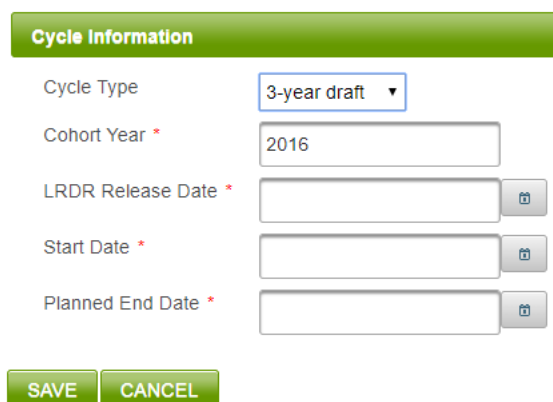
Cycle

Figure 210 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

Figure 211 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.