

Electronic Cohort Default Rate Appeals (eCDR Appeals)

New Data Adjustment (NDA) User Guide

Version 5.0.0

4/24/2019

DOCUMENT VERSION HISTORY

Versio n	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 <ul style="list-style-type: none"> - 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

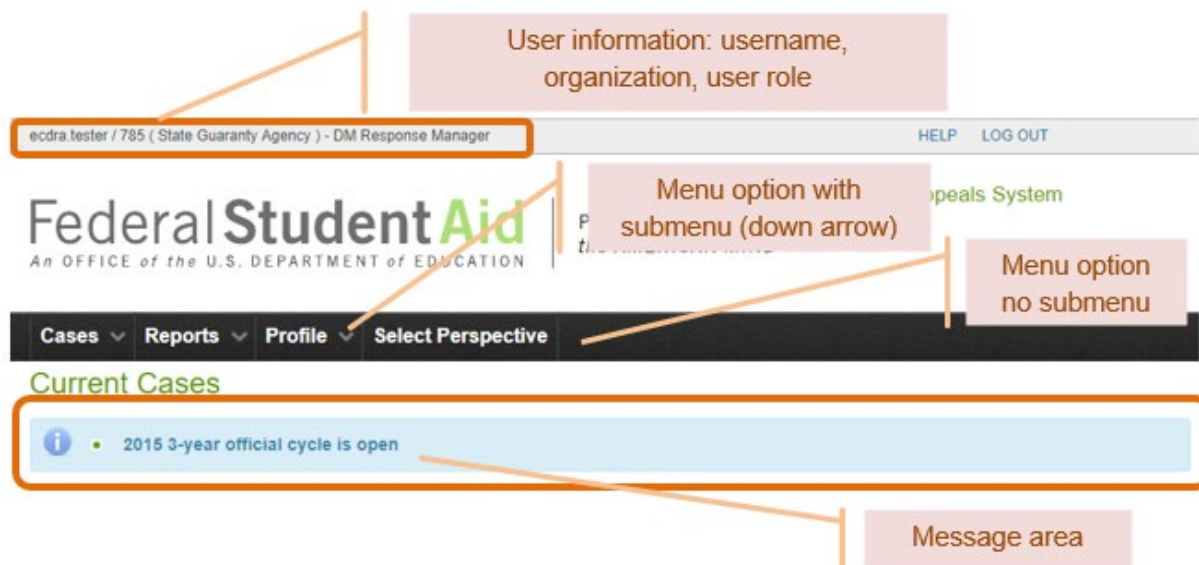


Figure 1 Always available information

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...).

880014:Geographic Center University

The screenshot displays a web interface for NDA appeals. At the top, a green bar labeled 'Adjustment Information' contains fields for Adjustment ID (703824), Case Type (3-YR NDA), SSN (000000026), Name (Kxxxxxx, Mxxxxxx J.), and Number of Loans (4). A vertical line separates this from the 'School Input' section below. The 'School Input' section is a gray bar containing fields for 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), and Effect on Calculation (2015 -D). Below this are 'Comments' and 'Supporting Documents' sections, each with a plus icon. At the bottom is another green bar labeled 'Adjustment Actions'. Callouts identify the green bar as a 'Section separator' and the gray bar as a 'Sub-section separator'.

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

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

Comments

Supporting Documents

Adjustment Actions

Figure 2 Page section - 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.

eCDR Appeals NDA User Guide

DM Adjustment Information

Request Adjustment Id: 1715588

Case Type: 3-YR NDA

SSN: 000000026

Name: Kxxxxxx, Mxxxxxx J.

Number of Loans: 4

Borrower Loan Information

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

School Input

DM Input

DM Response : *

Agree

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

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

05/18/2017

Date Defaulted (MM/DD/YYYY):

Effect on Calculation:

2015 -D

Click to expand sub-section

Figure 3 Collapsed sub-section - school input

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

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

School Input

Basis of Alleged Error: Incorrect date entered repayment

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

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

Date Defaulted (MM/DD/YYYY):

Effect on Calculation: 2015 -D

Click to collapse sub-section

DM Input

DM Response : * Agree

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

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

Date Defaulted (MM/DD/YYYY):

Effect on Calculation: 2015 -D

Figure 4 Expanded sub-section - school input

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

Profiles

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

Perspectives

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

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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.

The screenshot shows the eCDR Appeals login page. At the top, there is a header bar with the text "ecdra.bob". Below this is the "Federal Student Aid" logo, which includes the text "An OFFICE of the U.S. DEPARTMENT of EDUCATION" and "PROUD SPONSOR of the AMERICAN MIND™". A black horizontal bar separates the header from the main content area. Below the bar, the text "Select Perspective" is displayed in green. A dropdown menu is open, showing a list of perspectives: "Select One", "Select One", "111111 - School Case Manager", "333333 - School Case Manager", and "030776 - School Case Manager". Below the dropdown menu are two buttons: "SUBMIT" and "CANCEL". A callout box with a pink background and orange text points to the dropdown menu, stating: "Upon log in, no perspective selected yet. That can be selected from the drop-down list."

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

Cases for current cycles							
Showing 10 records (1 - 10 of 15)							
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	
Showing 10 records (1 - 10 of 15)							

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.

Cases for current cycles							
Showing 10 records (1 - 4 of 4)							
CASE ID	CASE TYPE	COHORT YEAR	OPEID	SCHOOL NAME	STATUS	STATUS DATE	ASSIGNED TO
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	
303571	3-YR IDC	2015	880020	Geographic Center University 21	Closed	01/03/2019	
303570	3-YR NDA	2015	880020	Geographic Center University 21	Awaiting LRDR	12/14/2018	
Showing 10 records (1 - 4 of 4)							

Figure 7 Current cases filtered by case ID

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

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

Figure 8 Current cases filtered by case type

Some columns have drop-down lists. The drop-down lists only values that are available from the table. For example, the case type column has a drop-down list. If there are only 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.

Cases for current cycles							
Showing 10 records (1 - 1 of 1)							
CASE ID	CASE TYPE	COHORT YEAR	OPEID	SCHOOL NAME	STATUS	STATUS DATE	ASSIGNED TO
<input type="text"/>			<input type="text"/>	<input type="text"/>			<input type="text"/>
303560	3-YR IDC	2015	999989	Martian Rover Institute of Technology	Closed	11/02/2018	
Showing 10 records (1 - 1 of 1)							

Figure 9 Current cases filtered by school name

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

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Cases for current cycles							
Showing 10 records (1 - 4 of 4) 1							
CASE ID	CASE TYPE	COHORT YEAR	OPEID	SCHOOL NAME	STATUS	STATUS DATE	ASSIGNED TO
30356				university	Closed		
303561	3-YR IDC	2015	111111	UNIVERSITY OF IO	Closed	11/15/2018	
303563	3-YR IDC	2015	880015	Geographic Center University 16	Closed	11/15/2018	
303566	3-YR UDA	2015	111111	UNIVERSITY OF IO	Closed	11/23/2018	
303569	3-YR NDA	2015	880015	Geographic Center University 16	Closed	12/07/2018	
Showing 10 records (1 - 4 of 4) 1							

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.

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Cases for current cycles							
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.

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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.

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Cases for current cycles							
<div> <div>Showing 25 records (1 - 15 of 15)</div> <div> <div>1</div> <div><<</div> <div><</div> <div>></div> <div>>></div> </div> </div> <div>RESET FILTERS</div>							
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.

Comments			
STATUS	COMMENT	TIMESTAMP	USER
Case manager decision review	Assigned fsa.casemanager to case for review	02/02/2018 1902:01	ecdra tester
Case manager decision review	Assigned fsa.caseworker to case for review	02/02/2018 1901:04	ecdra tester
Case manager decision review	Case manager decision review	02/02/2018 1853:58	ecdra tester
Available for case manager decision review	Assigned ecdra tester to case for review	02/02/2018 1853:57	ecdra tester
Available for case manager decision review	Available for case manager decision review	02/02/2018 1848:28	fsa.casemanager
Caseworker decision review	Caseworker decision review	02/02/2018 1829:15	fsa.casemanager
Available for caseworker decision review	Assigned fsa.casemanager to case for review	02/02/2018 1829:15	fsa.casemanager
Available for caseworker decision review	Available for caseworker decision review	02/02/2018 1826:19	fsa.casemanager
Case manager review	Case manager review	02/02/2018 1811:32	fsa.casemanager
Available for case manager review	Assigned fsa.casemanager to case for review	02/02/2018 1811:32	fsa.casemanager
Available for case manager review	Available for case manager review	02/02/2018 1802:46	fsa.caseworker
Caseworker review	Caseworker review	02/02/2018 1755:31	fsa.caseworker
Perfected/Available for FSA review	Assigned fsa.caseworker to case for review	02/02/2018 1755:31	fsa.caseworker
Perfected/Available for FSA review	Perfected/Available for FSA review	02/02/2018 1728:11	88001400 user

Figure 15 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)

eCDR Appeals NDA User Guide

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

Deadlines and calculation of days

Deadline for 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

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

Edit profile

999989: Martian Rover Institute of Technology



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

Organization Information

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

Figure 17 Organization contact information

eCDR Appeals NDA User Guide

User Contact Information

Last Name: *

Martin

First Name: *

John

Email*: *

john.martin@mrit.edu

Phone: *

202-555-5555

SAVE

CANCEL

Other User Contacts

NAME	EMAIL	PHONE
Test_Test	ed.test@ed.test	202-323-2343
Test_Test	ed.test@ed.test	202-323-2343
New Martian_Contact	mlt@ed.test	202-300-3233

NEW CONTACT

Figure 18 User contact information

If you are the first user from your school to log in to eCDR Appeals, you will need to complete your organizational and individual profiles, which consist of contact information. Figure 17 shows the organization contact information fields. The required fields 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

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

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Cases ▾

Reports ▾

Profile ▾

Select Perspective

Select Perspective

Select One ▾

Select One

111111 - School Case Manager

333333 - School Case Manager

030776 - School Case Manager

SUBMIT

CANCEL

Figure 19 Perspective selection for multiple schools

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

Menus

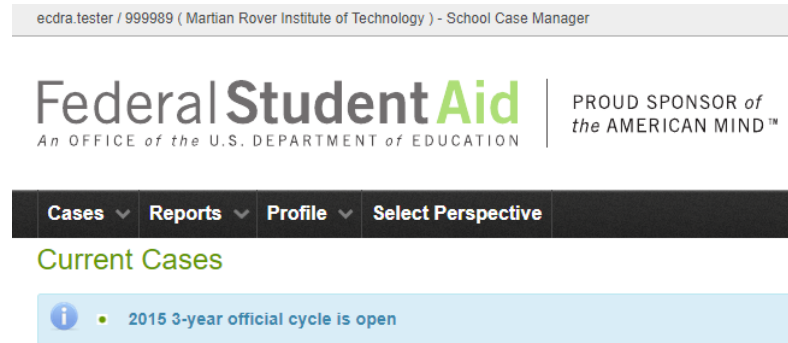


Figure 20 School user menu bar

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

Menu and sub-menu options for school users:

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

Cases for schools

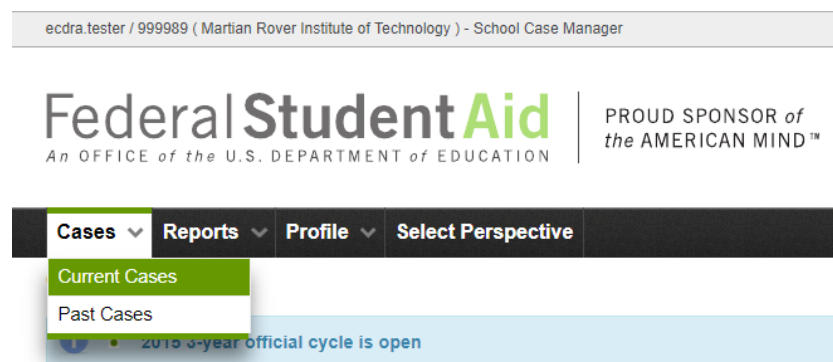


Figure 21 School user cases menu options

Current cases (school view)

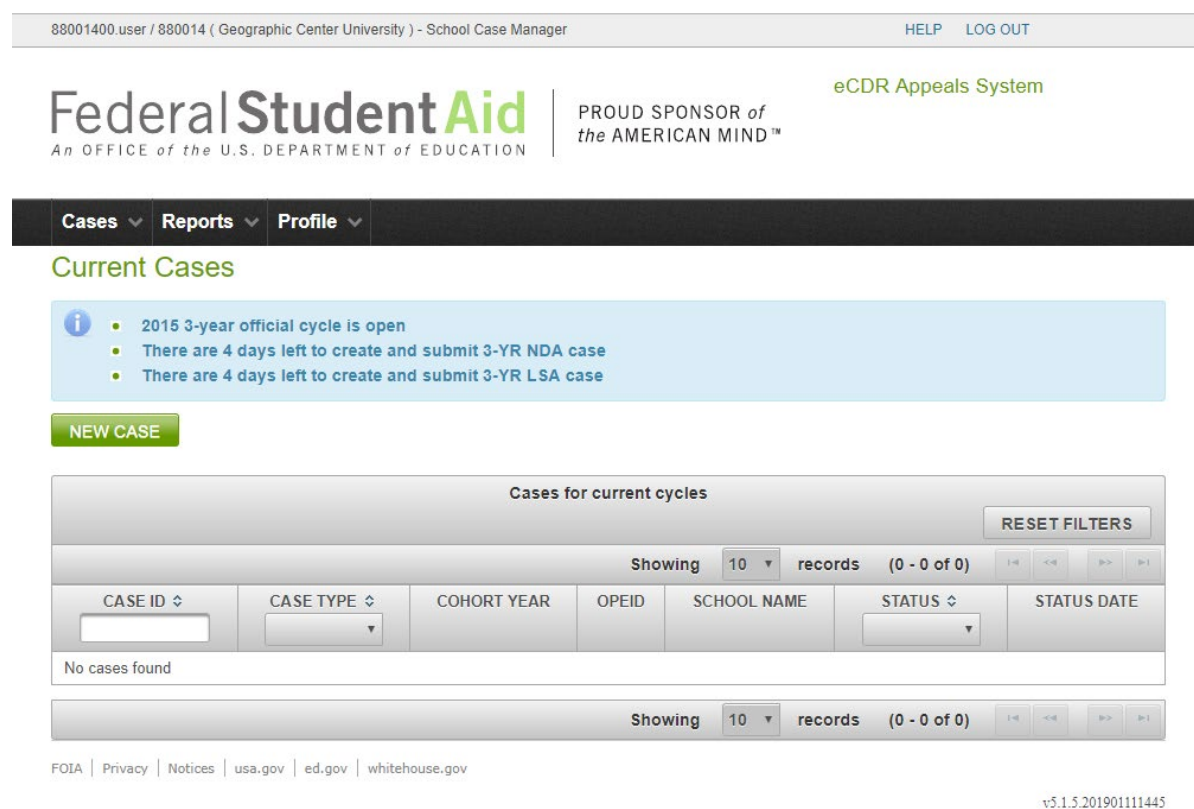


Figure 22 School user current cases page

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)

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

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Cases ▼Reports ▼Profile ▼Select Perspective

Past Cases

Cases for past cycles

Showing 10 records (1 - 2 of 2)

RESET FILTERS

CASE ID ↕	CASE TYPE ↕	COHORT YEAR ↕	OPEID ↕	SCHOOL NAME ↕	STATUS ↕	CLOSE DATE
303541	3-YR IDC	2012	999989	Martian Rover Institute of Technology	Closed	
303529	3-YR LSA	2012	999989	Martian Rover Institute of Technology	Servicing records being prepared	

Showing 10 records (1 - 2 of 2)

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

Figure 23 School user past cases page

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

Case (school view)

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

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Cases ▾Reports ▾Profile ▾

Case Details

- You must select loans for all requested adjustments before you can certify and submit the case
- There are 4 days to submit 3-YR NDA case

880014:Geographic Center University

[Print Case Details](#)

Workflow Actions

Case workflow actions.

CERTIFY

Case Information

Case ID: 303919

Cohort Year: 2015

Case Type: 3-YR NDA

Status: Being prepared

Status Date: 02/02/2018

Case information.

Comment:

SAVECANCEL

Comments

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

Case Information

Case ID: 303919
Cohort Year: 2015
Case Type: 3-YR NDA
Status: Being prepared
Status Date: 02/02/2018

Comment:

SAVE **CANCEL**

Case Actions

NEW ADJUSTMENT

Adjustments

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

Case Information

Case ID: 303919
Cohort Year: 2015
Case Type: 3-YR NDA
Status: Being prepared
Status Date: 02/02/2018

Comment:

SAVE **CANCEL**

Comments

STATUS	COMMENT	TIMESTAMP	USER
Being prepared	Being prepared	02/02/2018 1559:15	fsa.casemanager
Awaiting LRDR	Awaiting LRDR	02/02/2018 1549:14	System User
Case created	Due date to submit case to DM will be computed and set.	02/02/2018 1549:13	System User
Case created	This is a test	02/02/2018 1549:13	88001400.user

Case Actions

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**.

A screenshot of the 'Create Case' page. At the top, there is a navigation bar with 'Cases', 'Reports', and 'Profile' dropdown menus. Below the navigation bar, the page title 'Create Case' is displayed in green. A light blue information box contains three bullet points: 'The 3-YR UDA case cannot be created (possible reasons: not eligible, submission period past, already created, etc...)', 'There are 4 days left to create and submit 3-YR NDA case', and 'There are 4 days left to create and submit 3-YR LSA case'. Below the information box, the text '880014:Geographic Center University' is displayed. A green bar labeled 'Workflow Actions' contains the text 'No available workflow actions'. Below this, a green bar labeled 'Case Information' contains a 'Case Type' dropdown menu with the following options: '2015 - 3-YR NDA', '2015 - 3-YR NDA', and '2015 - 3-YR LSA'. Below the dropdown menu is a 'Comment' text area. At the bottom of the page, there are two green buttons labeled 'SAVE' and 'CANCEL'. The footer of the page contains the text 'FOIA | Privacy | Notices | usa.gov | ed.gov | whitehouse.gov' and the version number 'v5.1.5.201901111445'.

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

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Cases ▾

Reports ▾

Profile ▾

Borrower Selection

i

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

880014:Geographic Center University

Borrower Information

SSN: *

CREATE ADJUSTMENT

CANCEL

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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

88001500.user / 880015 (Geographic Center University) - School Case Manager [HELP](#) [LOG OUT](#)

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Cases ▾ **Reports** ▾ **Profile** ▾

Borrower Selection

880015:Geographic Center University

Borrower Information

X • The SSN you entered is not present in the LRDR or is invalid. Please review and type in the correct SSN to search for. If you are sure that this is the correct SSN, please fill in the borrower's name in the text fields provided below to create a record for this borrower.

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

SSN:

CREATE ADJUSTMENT **CANCEL**

SSN:

Last Name:

First Name:

Middle-Initial:

CREATE ADJUSTMENT **CANCEL**

Re-do search for borrower with SSN

Create borrower record from given information

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

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

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Cases ▾Reports ▾Profile ▾

Adjustment Detail

880014:Geographic Center University

Adjustment Processing Actions

No available workflow actions

Adjustment Information

Request Adjustment ID:
Case Type:3-YR NDA
SSN:000000026
Name:Kxxxxxx, Mxxxxxxx J.
Number of Loans:

School Input

Basis of Alleged Error: *
Select One ▾

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

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

Date Defaulted
(MM/DD/YYYY):

Effect on Calculation: *
Select One ▾
Select One ▾

Select One ▾
Select One ▾

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.

Adjustment information

Request Adjustment ID:
Case Type: 3-YR NDA
SSN: 000000026
Name: Kxxxxxx, Mxxxxxxx J.
Number of Loans:

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
Select One
Select One
Select One

Select One
+B Add to both numerator and denominator
+D Add to denominator
+N Add to numerator
-B Subtract from both numerator and denominator
-D Subtract from denominator
-N Subtract from numerator

Comment:

SAVE CANCEL

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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

Adjustment Actions

NEW ADJUSTMENT SELECT/DESELECT LOANS CHANGE DATA MANAGER **DELETE ADJUSTMENT**

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		Created	02/02/2018	

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.

The screenshot shows the top navigation bar with the user ID '88001400.user / 880014 (Geographic Center University) - School Case Manager' and links for 'HELP' and 'LOG OUT'. Below this is the 'Federal Student Aid' logo, which includes the text 'An OFFICE of the U.S. DEPARTMENT of EDUCATION' and 'PROUD SPONSOR of the AMERICAN MIND™'. To the right of the logo is the 'eCDR Appeals System' text. A dark navigation bar contains 'Cases', 'Reports', and 'Profile' with dropdown arrows. Below this is the 'Case Certification Upload' heading. A green 'BACK TO CASE' button is in the top right. A light blue information box contains a list of recommended file formats: Portable Document Format (PDF), MS Excel (XLS), MS Word (DOC), Rich Text Format (RTF), Plain text (TXT), and Pictures (JPG/PNG/GIF). Below this box is a green bar. The 'Select File:' section has a 'Choose File' button and the text 'No file chosen'. Below that is a 'File Description:' text input field. At the bottom are 'SAVE' and 'CANCEL' buttons.

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

The screenshot shows a green bar labeled 'Workflow Actions'. On the right side of this bar are two buttons: 'SUBMIT' and 'DECERTIFY'. The 'DECERTIFY' button is highlighted with an orange rectangular border. Below this bar is another green bar labeled 'Case Information'.

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.

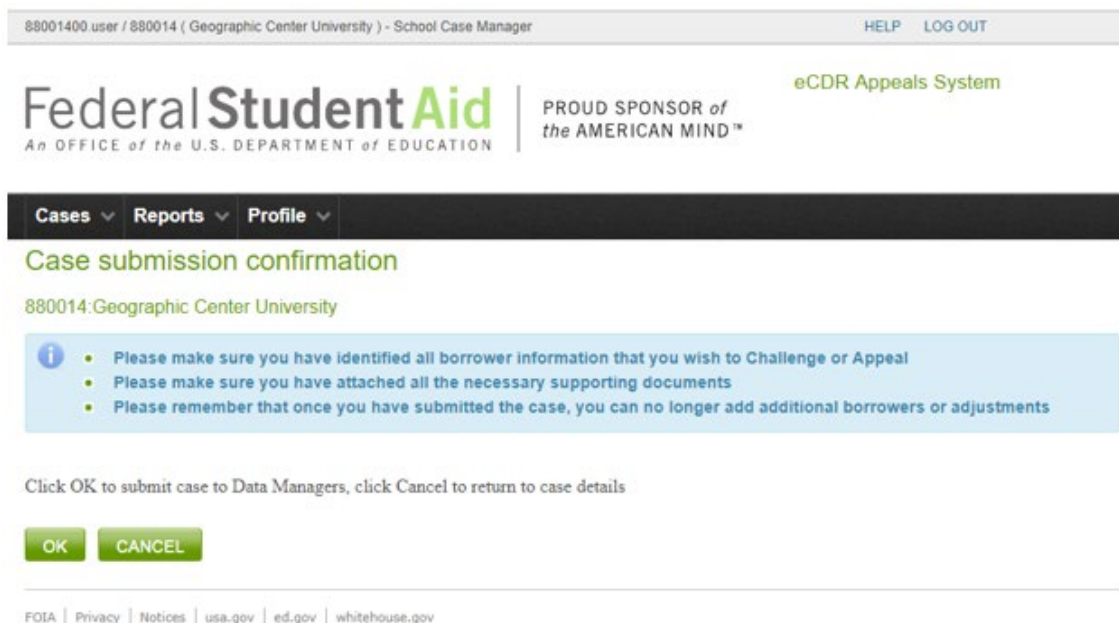


Figure 39 Case submission confirmation page

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.

Ending 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

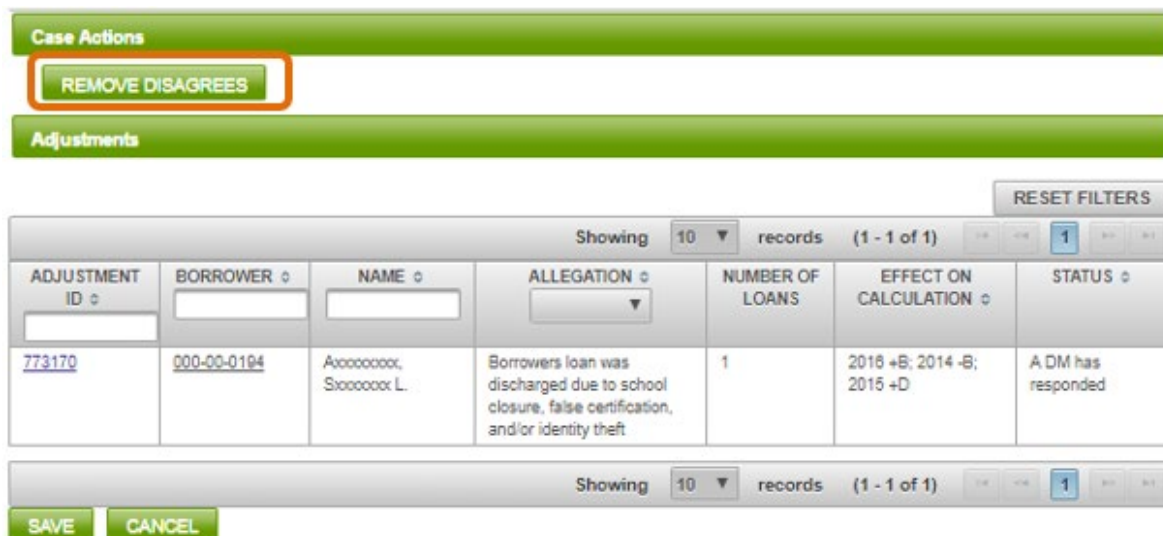


Figure 41 Case remove disagrees

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.

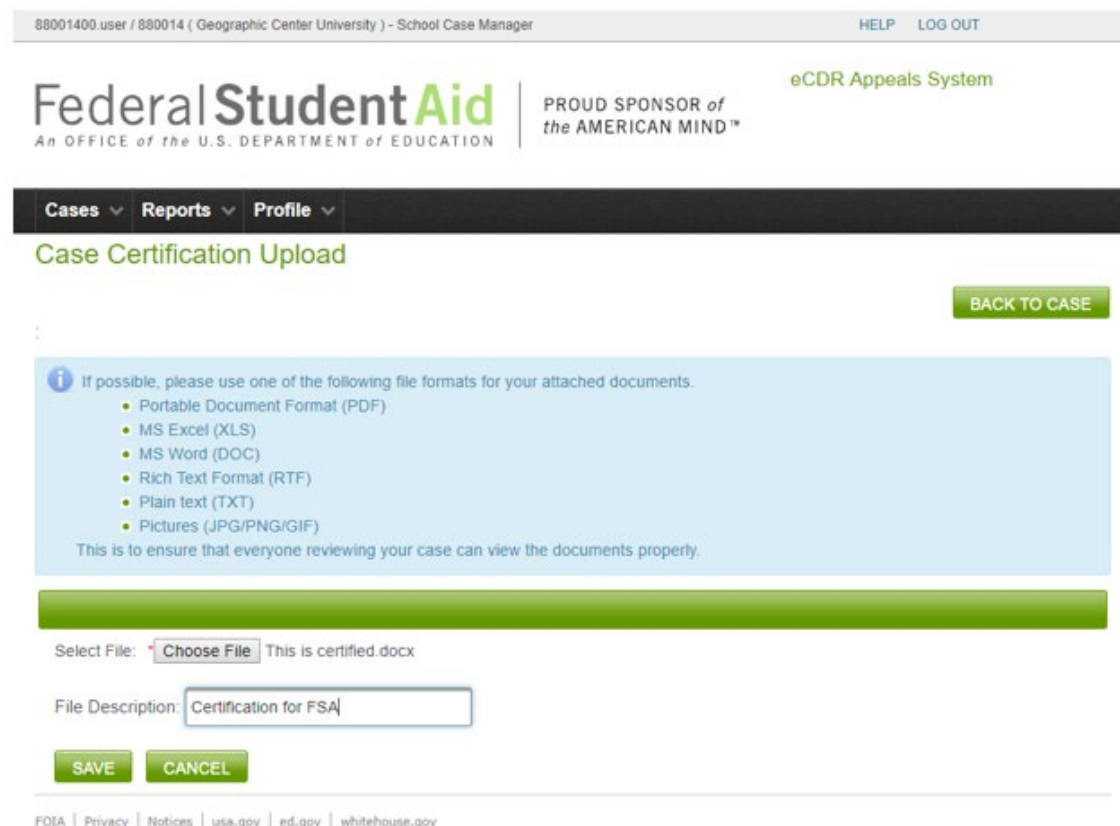


Figure 43 Case certification, for FSA, upload page

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.

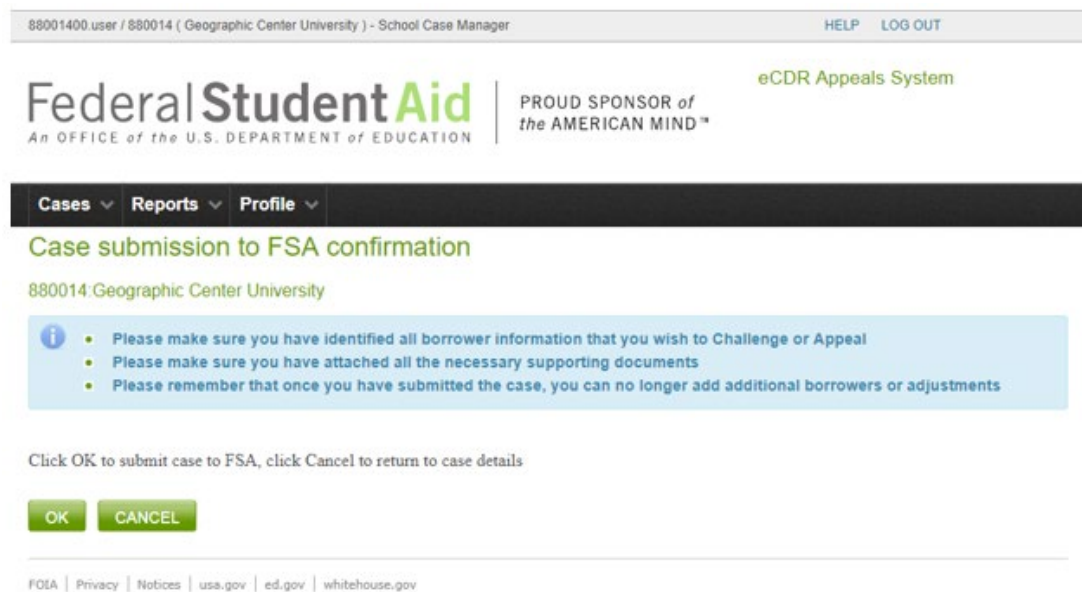


Figure 46 Case submit to FSA confirmation page

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.

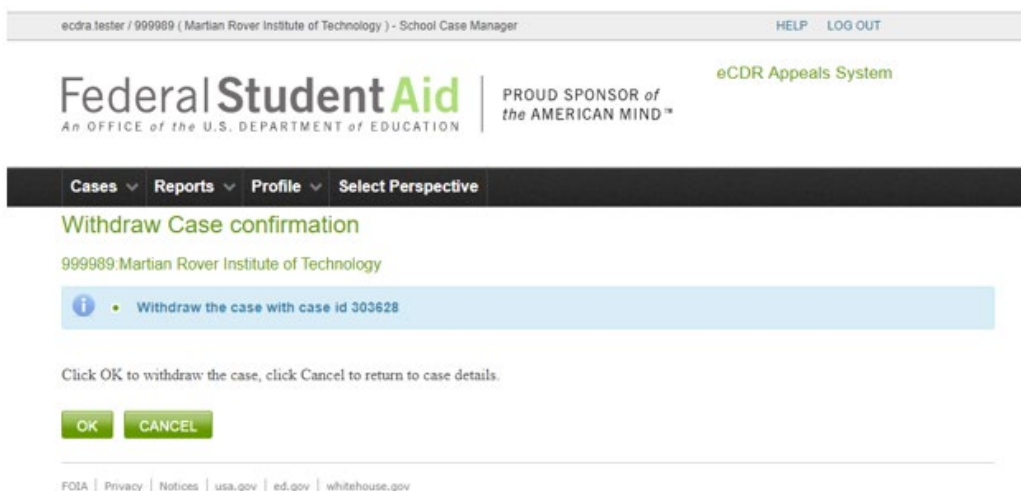


Figure 49 Case withdraw confirmation page

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

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

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Cases ▾ **Reports** ▾ **Profile** ▾

Adjustment Detail

Adjustment processing actions. [BACK TO CASE](#)

880014:Geographic Center University

Adjustment Processing Actions
No available workflow actions

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

School Input

Basis of Alleged Error: Incorrect date entered repayment

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

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

Date Defaulted (MM/DD/YYYY):

Effect on Calculation: *

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

DM ADJUSTMENT ID	DM CODE	NUMBER OF LOANS	EFFECTS	RESPONSE	STATUS	STATUS DATE	COMMENTS
1715588	555	4	2015 -D		Created	02/02/2018	

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

Comments history table

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

The screenshot shows the 'Supporting Documents' section of the Adjustment Details page. It features a 'Comments' field at the top, followed by a 'Supporting Documents' section. Within this section, there is a green button labeled 'ATTACH FILE' which is highlighted with an orange border. Below the button is a table with three columns: 'FILE NAME', 'FILE DESCRIPTION', and 'ACTION'. The table currently displays 'No documents attached'. At the bottom of the section is a green bar labeled 'Adjustment Actions'.

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.

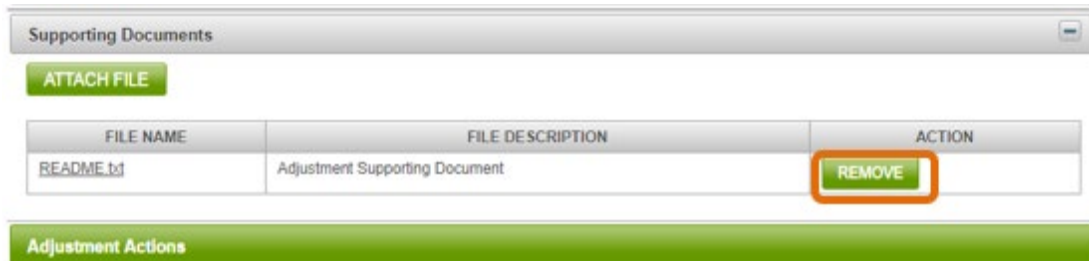
The screenshot shows the 'Document Upload' page. At the top, there is a header bar with the user's name 'ecdra.tester / 999989 (Marian Rover Institute of Technology) - School Case Manager' and links for 'HELP' and 'LOG OUT'. Below the header is the 'Federal Student Aid' logo and the text 'PROUD SPONSOR of the AMERICAN MIND™'. A navigation bar contains links for 'Cases', 'Reports', 'Profile', and 'Select Perspective'. The main heading is 'Document Upload'. On the right side, there is a green button labeled 'BACK TO ADJUSTMENT'. A light blue information box contains a message: 'If possible, please use one of the following file formats for your attached documents.' followed by a list of supported formats: Portable Document Format (PDF), MS Excel (XLS), MS Word (DOC), Rich Text Format (RTF), Plain text (TXT), and Pictures (JPG/PNG/GIF). Below this list is a note: 'This is to ensure that everyone reviewing your case can view the documents properly.' The main form area has a green bar labeled 'Attach Adjustment Supporting Document'. Below this bar, there is a 'Select File:' label, a 'Choose File' button, and the text 'No file chosen'. There is also a 'File Description:' label and an empty text input field. At the bottom of the form are two green buttons: 'SAVE' and 'CANCEL'.

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



The screenshot shows a web interface for managing supporting documents. At the top is a header bar labeled "Supporting Documents" with a small icon on the right. Below this is a green button labeled "ATTACH FILE". Underneath is a table with three columns: "FILE NAME", "FILE DESCRIPTION", and "ACTION". The table contains one row with the file name "README.txt" and the description "Adjustment Supporting Document". In the "ACTION" column, there is a green button labeled "REMOVE", which is highlighted with an orange rectangle. Below the table is a green bar labeled "Adjustment Actions".

FILE NAME	FILE DESCRIPTION	ACTION
README.txt	Adjustment Supporting Document	REMOVE

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



The screenshot shows a web interface for managing loans. At the top is a green bar labeled "Adjustment Actions". Below this bar are four green buttons: "NEW ADJUSTMENT", "SELECT/DESELECT LOANS", "CHANGE DATA MANAGER", and "DELETE ADJUSTMENT". The "SELECT/DESELECT LOANS" button is highlighted with an orange rectangle. Below these buttons is another green bar with the text "Data Manager Adjustments - The Table shows how the loans have been packaged according to Data Managers".

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, Mxxxxxx 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
<input checked="" type="checkbox"/>	1715666	SF	555	RP	11/23/2009		07/14/2008	03/14/2009	06/12/2008	\$3,500.00	D
<input checked="" type="checkbox"/>	1715667	SU	555	RP	11/23/2009		07/14/2008	03/14/2009	06/12/2008	\$6,000.00	E
<input checked="" type="checkbox"/>	1715668	SU	555	RP	11/23/2009		03/16/2009	05/23/2009	04/24/2009	\$2,333.00	E
<input checked="" type="checkbox"/>	1715669	SF	555	RP	11/23/2009		03/16/2009	05/23/2009	04/24/2009	\$1,750.00	E

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

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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
<input checked="" type="checkbox"/>	1715666	SF	555	RP	11/23/2009		07/14/2008	03/14/2009	06/12/2008	\$3,500.00	D
<input checked="" type="checkbox"/>	1715667	SU	555	RP	11/23/2009		07/14/2008	03/14/2009	06/12/2008	\$6,000.00	E
<input type="checkbox"/>	1715668	SU	555	RP	11/23/2009		03/16/2009	05/23/2009	04/24/2009	\$2,333.00	E
<input type="checkbox"/>	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.

Loan Select/Deselect

BACK TO ADJUSTMENT

880015:Geographic Center University

There are some loans that were not selected. Please note that if corrections are made to some loans but not others, your cohort default rate may remain unchanged. If you are sure that these loans do not need to be included you may keep them unchanged and return to the adjustment by clicking on the Back to Adjustment or Cancel button.

Borrower Loans Information

Adjustment ID: 703864
Borrower SSN: 000000026
Borrower Name: Kxxxxxx, Mxxxxxxx J.
Case Type: 3-YR NDA
Number of Loans: 2
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
<input type="checkbox"/>	4763407	SU	555	RP	11/23/2009		03/16/2009	05/23/2009	04/24/2009	\$2,333.00	E
<input type="checkbox"/>	4763408	SF	555	RP	11/23/2009		03/16/2009	05/23/2009	04/24/2009	\$1,750.00	E

Selected Loans

SELECTED	LOAN ID	LOAN TYPE	DM	LOAN STATUS	REPAYMENT DATE	DEFAULT DATE	START DATE	END DATE	GUARANTY DATE	AMOUNT	CDR USAGE1
<input checked="" type="checkbox"/>	1715666	SF	555	RP	11/23/2009		07/14/2008	03/14/2009	06/12/2008	\$3,500.00	D
<input checked="" type="checkbox"/>	1715667	SU	555	RP	11/23/2009		07/14/2008	03/14/2009	06/12/2008	\$6,000.00	E

SAVE

CANCEL

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.

eCDR Appeals NDA User Guide



Borrower Loans Information

Adjustment ID: 773171
Borrower SSN: 000000194
Borrower Name: Axxxxxxxx, Sxxxxxxxx L.
Case Type: 3-YR NDA
Number of Loans: 1
Basis of Alleged Error: Wrong social security number - borrower is co

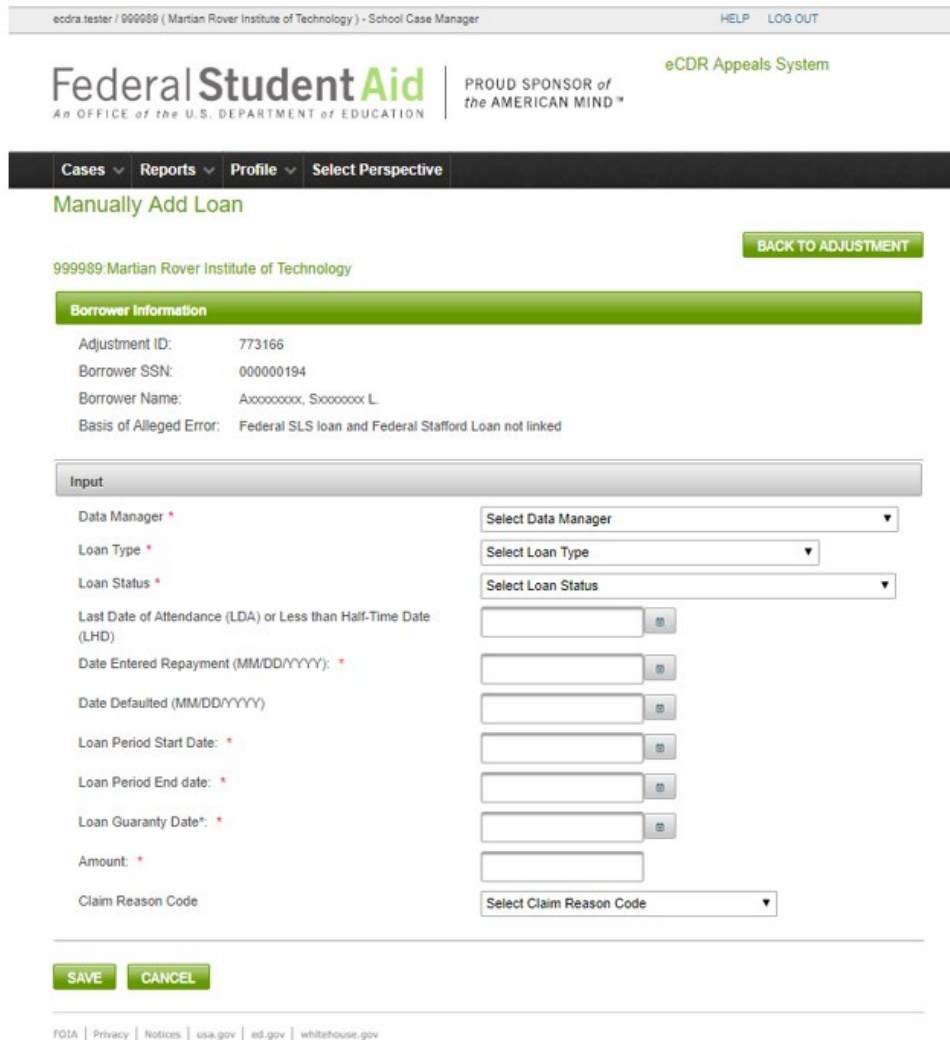
ADD LOAN MANUALLY

Unselected Loans (from LRDR)

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.



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

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Manually Add Loan [BACK TO ADJUSTMENT](#)

999989: Marian Rover Institute of Technology

Borrower Information

Adjustment ID: 773166
Borrower SSN: 000000194
Borrower Name: Axxxxxxxx, Sxxxxxxxx L.
Basis of Alleged Error: Federal SLS loan and Federal Stafford Loan not linked

Input

Data Manager *

Loan Type *

Loan Status *

Last Date of Attendance (LDA) or Less than Half-Time Date (LHD)

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

Date Defaulted (MM/DD/YYYY)

Loan Period Start Date: *

Loan Period End date: *

Loan Guaranty Date*: *

Amount: *

Claim Reason Code

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

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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.

Loan Select/Deselect

[BACK TO ADJUSTMENT](#)

999989: Martian Rover Institute of Technology

Borrower Loans Information

Adjustment ID: 773166
Borrower SSN: 000000194
Borrower Name: Axxxxxxxx, Sxxxxxxxx L.
Case Type: 3-YR NDA
Number of Loans: 1
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
<input checked="" type="checkbox"/>	223210	CL	785	AL	05/10/2019	05/10/2019	05/10/2019	05/10/2019	05/10/2019	\$120.00	

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

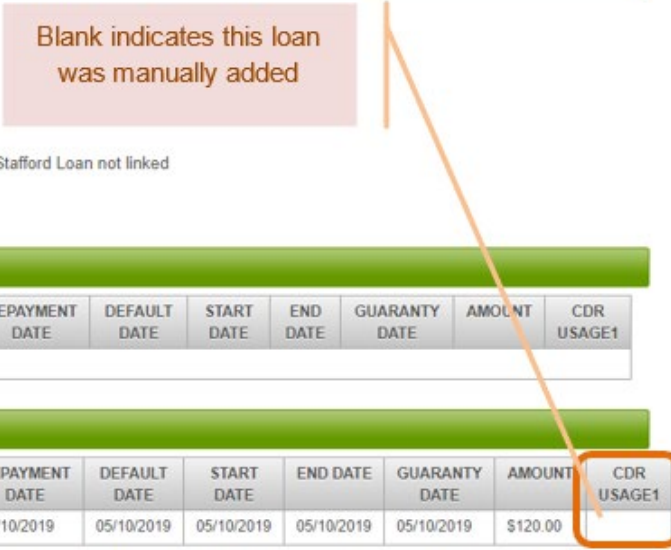


Figure 62 Loan manually added

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

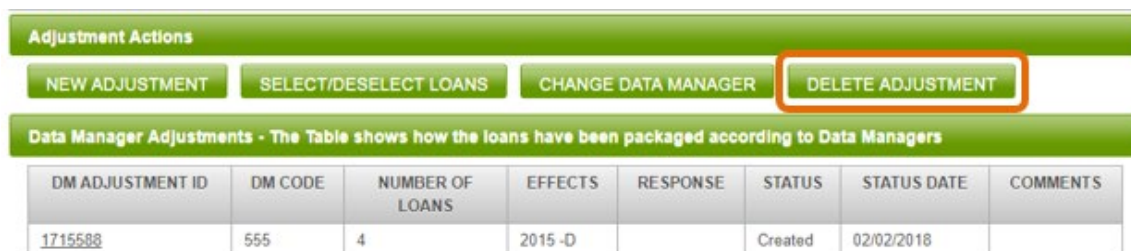


Figure 63 Delete adjustment button

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

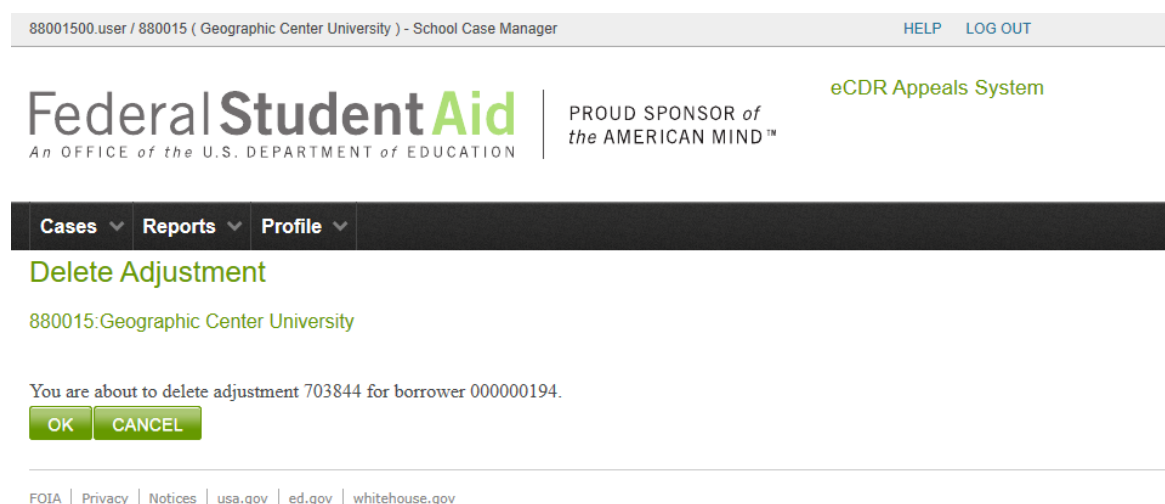


Figure 64 Delete adjustment confirmation

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

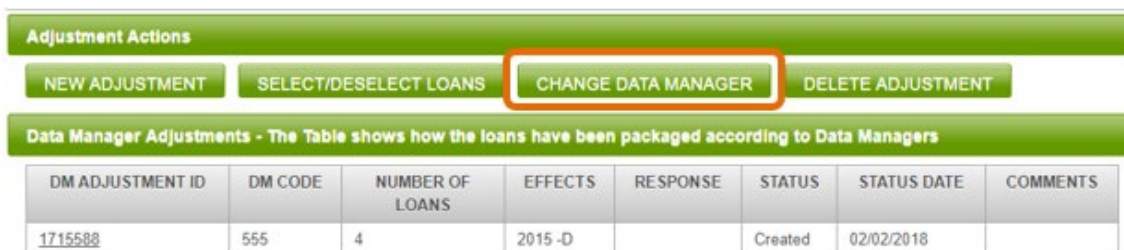


Figure 65 Adjustment Change Data Manager button

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: *

Loans

SELECTED	LOAN ID	LOAN TYPE	DM	LOAN STATUS	REPAYMENT DATE	DEFAULT DATE	START DATE	END DATE	GUARANTY DATE	AMOUNT	CDR USAGE1
<input type="checkbox"/>	1715645	SU	555	RP	11/23/2009		03/16/2009	05/23/2009	04/24/2009	\$2,333.00	E
<input type="checkbox"/>	1715646	SF	555	RP	11/23/2009		03/16/2009	05/23/2009	04/24/2009	\$1,750.00	E
<input type="checkbox"/>	1715666	SF	555	RP	11/23/2009		07/14/2008	03/14/2009	06/12/2008	\$3,500.00	D
<input type="checkbox"/>	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
<input checked="" type="checkbox"/>	1715645	SU	555	RP	11/23/2009		03/16/2009	05/23/2009	04/24/2009	\$2,333.00	E
<input checked="" type="checkbox"/>	1715646	SF	555	RP	11/23/2009		03/16/2009	05/23/2009	04/24/2009	\$1,750.00	E
<input type="checkbox"/>	1715666	SF	555	RP	11/23/2009		07/14/2008	03/14/2009	06/12/2008	\$3,500.00	D
<input type="checkbox"/>	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

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

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Data Manager Adjustment Detail

BACK TO ADJUSTMENT

880014:Geographic Center University

DM Adjustment Processing Actions

REQUEST CLARIFICATION

DM Adjustment Information

Request Adjustment Id:1715588

Case Type:3-YR NDA

SSN:000000026

Name:Kxxxxxx, Mxxxxxxx J.

Number of Loans:4

Figure 69 DM Adjustment basic information

eCDR Appeals NDA User Guide

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

eCDR Appeals NDA User Guide

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

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

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Data Manager Adjustment Detail

[BACK TO ADJUSTMENT](#)

880014: Geographic Center University

DM Adjustment Processing Actions

[REQUEST CLARIFICATION](#)

DM Adjustment Information

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

Data Manager Supporting Documents

FILE NAME	FILE DESCRIPTION
No documents attached	

DM Adjustment Actions

No available dmAdjustment actions

Figure 73 DM adjustment actions, school user

There are no DM adjustment actions for a school user.

Comments

Comment:

SAVE CANCEL

Comments history table

STATUS	COMMENT	TIMESTAMP	USER
Case worker review complete	Case worker review complete	02/02/2018 18:53:58	ecdra.testar
Case worker review complete	Case worker review complete	02/02/2018 18:53:58	ecdra.testar
Case worker review complete	Case worker review complete	02/02/2018 18:18:28	fsa.casamanager

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.

DM Adjustments							
Showing 10 records (1 - 1 of 1) RESET FILTERS							
DM ADJUSTMENT ID	BORROWER	NAME	ALLEGATION	RESPONSE	NUMBER OF LOANS	EFFECT ON CALCULATION	STATUS
223221	000-00-0194	Axxxxxxx, Sxxxxxx L.	Federal SLS loan and Federal Stafford Loan not linked		1	2016 -N; 2015 - D; 2014 +N	Addl data requested from school

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.

Data Manager Adjustment Detail

BACK TO ADJUSTMENT

999989: Martian Rover Institute of Technology

DM Adjustment Processing Actions

PROVIDE ADDITIONAL DATA

DM Adjustment Information

Request Adjustment Id: 223221

Case Type: 3-YR NDA

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.

The screenshot shows the top navigation bar with the user 'ecdra tester / 999989 (Marian Rover Institute of Technology) - School Case Manager' and links for 'HELP' and 'LOG OUT'. Below this is the 'Federal Student Aid' logo and the text 'PROUD SPONSOR of the AMERICAN MIND™'. The main navigation menu includes 'Cases', 'Reports', 'Profile', and 'Select Perspective'. The current page is titled 'Provide additional data to DM' and shows the user '999989:Marian Rover Institute of Technology'. A blue information box states: 'You may include a comment here. If you wish to include an attachment, please cancel and add attachment in the dm adjustment details page.' Below this is a text area for providing additional information to the Data Manager. At the bottom are two buttons: 'FORWARD TO DATA MANAGER' and 'CANCEL'. The footer contains links for 'FOIA', 'Privacy', 'Notices', 'usa.gov', 'ed.gov', and 'whitehouse.gov'.

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

The screenshot shows a green bar labeled 'DM Adjustment Processing Actions'. On the right side of this bar is a button labeled 'REQUEST CLARIFICATION', which is highlighted with an orange border. Below this bar is another green bar labeled 'DM Adjustment Information'.

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.

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

HELPLOG OUT

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eCDR Appeals System

Cases▼Reports▼Profile▼

Request clarification from DM

880014:Geographic Center University

i

- You may include a comment here. If you wish to include an attachment, please cancel and add attachment in the dm adjustment details page.

Request clarification from Data Manager:

Tell me, where did I go wrong. What can I do to make you change your mind, completely.

REQUEST CLARIFICATION

CANCEL

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

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)

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

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Cases▼Reports▼Profile▼Select Perspective

Current

Current Status

CDR Changes

i

- 2019 3-year official cycle is open

Figure 80 School reports menu options

Current status

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

HELP LOG OUT

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eCDR Appeals System

Cases ▾

Reports ▾

Profile ▾

Select Perspective

Current Status Reports for OPEID - 999989

Current Cycles

2016 3-year draft

2016 3-year official

Requests for additional information

Loan Servicing Appeal (LSA) records requests that require fees

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

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.

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

HELPLOG OUT

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Cases▼Reports▼Profile▼Select Perspective

Current Status Reports for OPEID - 999989

Current Cycles

2016 3-year draft

2016 3-year official

Requests for additional information

DM ADJUSTMENT ID	CASE ID ▾	DATA MANAGER ▾	PROVIDE ADDITIONAL INFORMATION BY
223342	303634	785	05/16/2019

Loan Servicing Appeal (LSA) records requests that require fees

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

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.

CDR Changes

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

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eCDR Appeals System

Cases

Reports

Profile

Select Perspective

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

Current Cycles

2016 3-year draft

2016 3-year official

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

2016 3-year draft

BORROWER	NUMERATOR	DENOMINATOR
000000194	1	1

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

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

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

HELPLOG OUT

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eCDR Appeals System

Cases▼Reports▼Profile▼Select Perspective▼

Edit profile

785:RAVENLAW RELIEF

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

Organization Information

Organization Name: *

RAVENLAW RELIEF

Address: *

14 AERIE RD

City: *

NASHUA

State:

NH - New Hampshire▼

Zip:

03060

Country:

Organization Email: *

fernando.felixberto+genericDM@gmail.com

Alternate Email:

Phone Number: *

888-555-1212

Alternate Phone:

3322222222

User Contact Information

Last Name: *

First Name: *

Email*: *

Figure 84 Data Manager organization profile page

eCDR Appeals NDA User Guide

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

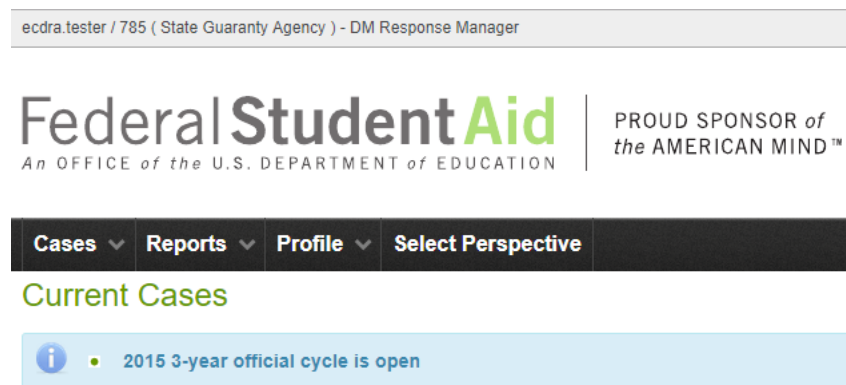


Figure 86 DM user menu bar

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

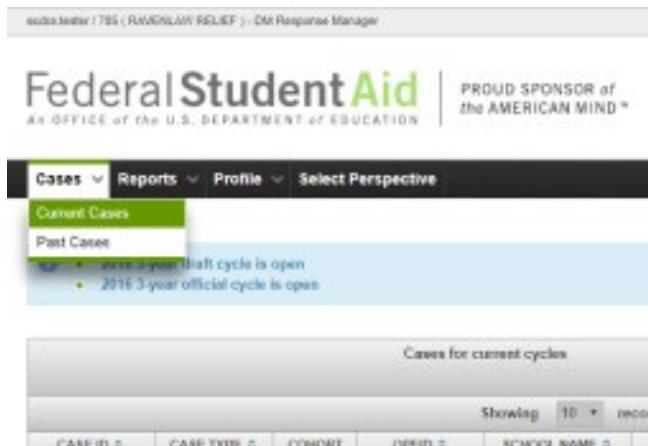


Figure 87 Cases menu options, DM user

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.

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 ▾

Current Cases

 • 2015 3-year official cycle is open

Cases for current cycles

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

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

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

[FOIA](#) | [Privacy](#) | [Notices](#) | [usa.gov](#) | [ed.gov](#) | [whitehouse.gov](#)

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)

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

HELP LOG OUT

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Cases ▾ Reports ▾ Profile ▾ Select Perspective ▾

Past Cases

Cases for past cycles

Showing 10 records (1 - 10 of 38)

RESET FILTERS

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

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

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** ▾

Case Details



- You must put the case in review before you can respond to the requested adjustments
- There are 30 days (counting from next business day) to respond to the case

880014:Geographic Center University [Print Case Details](#)

Workflow Actions

[PUT IN DM REVIEW](#)

Case Information

Case ID:	303919
Cohort Year:	2015
Case Type:	3-YR NDA
Status:	Submitted
Status Date:	02/02/2018

Certification

- [This is certified.pdf](#) Certification


Comments 

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

Case Information

Case ID: 303919

Cohort Year: 2015

Case Type: 3-YR NDA

Status: Data Manager review

Status Date: 02/02/2018

Certification

[This is certified.pdf](#)

Certification

Comment:

SAVE

CANCEL

Comments

Case Actions

No available case actions

DM Adjustments

Showing 10 records (1 - 1 of 1)

RESET FILTERS

DM ADJUSTMENT ID	BORROWER	NAME	ALLEGATION	RESPONSE	NUMBER OF LOANS	EFFECT ON CALCULATION	STATUS
1715588	000-00-0026	Kxxxxx, Mxxxxxx J.	Incorrect date entered repayment		4	2015 -D	DM review

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.

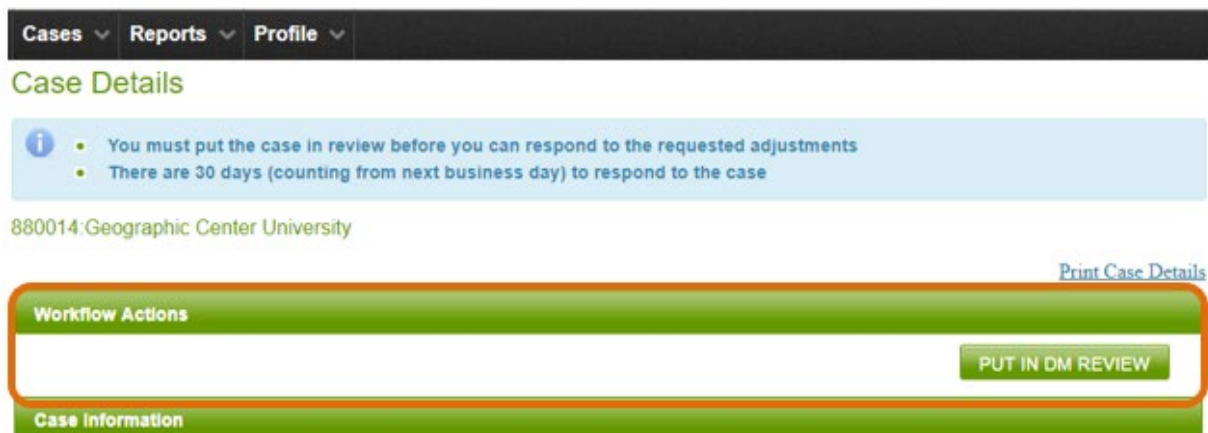


Figure 92 Case workflow actions, DM user

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

The screenshot shows the eCDR Appeals System interface. At the top, there is a header bar with the user's name 'ecdra.tester / 785 (RAVENLAW RELIEF) - DM Response Manager' and links for 'HELP' and 'LOG OUT'. Below this is the 'Federal Student Aid' logo, which includes the text 'An OFFICE of the U.S. DEPARTMENT of EDUCATION' and 'PROUD SPONSOR of the AMERICAN MIND™'. To the right of the logo is the text 'eCDR Appeals System'. Below the header is a navigation bar with tabs for 'Cases', 'Reports', 'Profile', and 'Select Perspective'. The 'Cases' tab is selected. Below the navigation bar is the 'Case Details' section. It features a blue information box stating 'There are 30 days (counting from next business day) to respond to the case'. Below this is the case name '999989.Martian Rover Institute of Technology' and a 'Print Case Details' link. A green bar labeled 'Workflow Actions' contains a button labeled 'RESPOND TO CASE', which is highlighted with a red rectangular box. Below the 'Workflow Actions' bar is the 'Case Information' section, which displays the following details: Case ID: 303630, Cohort Year: 2016, Case Type: 3-YR NDA, Status: Data Manager review, and Status Date: 05/10/2019.

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, Mxxxxxx J.
Number of Loans: 4




Borrower Loan Information

IN CURRENT LRDR	INCLUDED IN CASE	LOAN TYPE	BEGIN DATE	END DATE	LOAN GUARANTY DATE	AMOUNT	ORIGINAL SCHOOL	CURRENT SCHOOL	GUARANTY AGENCY	GA ROUTED TO	ADJ
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

eCDR Appeals NDA User Guide

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):	<input type="text"/> 						
Date Entered Repayment (MM/DD/YYYY): *	05/18/2017 						
Date Defaulted (MM/DD/YYYY):	<input type="text"/> 						
Effect on Calculation:	<table><tr><td>2015 ▾</td><td>-D Subtract from denominator ▾</td></tr><tr><td>Select One ▾</td><td>Select One ▾</td></tr><tr><td>Select One ▾</td><td>Select One ▾</td></tr></table>	2015 ▾	-D Subtract from denominator ▾	Select One ▾	Select One ▾	Select One ▾	Select One ▾
2015 ▾	-D Subtract from denominator ▾						
Select One ▾	Select One ▾						
Select One ▾	Select One ▾						

Comment:

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

The screenshot shows the 'Data Manager Adjustment Detail' page. At the top, there is a navigation bar with 'Cases', 'Reports', and 'Profile' dropdown menus. Below this, the page title 'Data Manager Adjustment Detail' is displayed. A 'BACK TO CASE' button is located in the top right corner. The main content area shows the identifier '880014:Geographic Center University'. A green box highlights the 'DM Adjustment Processing Actions' section, which contains a 'REQUEST ADDITIONAL DATA' button. Below this, the 'DM Adjustment Information' section is visible.

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.

The screenshot shows the 'Data Manager Adjustment Actions' page. At the top, there is a section titled 'Data Manager Supporting Documents' with an 'ATTACH FILE' button. Below this is a table with three columns: 'FILE NAME', 'FILE DESCRIPTION', and 'ACTION'. The table currently shows 'No documents attached'. A green box highlights the 'DM Adjustment Actions' section, which contains a 'CHANGE DATA MANAGER' button.

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

The screenshot shows a web interface for adding and viewing comments. At the top, there is a 'Comment:' label followed by a text input field. Below the input field are two buttons: 'SAVE' and 'CANCEL'. To the right of the input field, there is a label 'Comment input text field'. Below the input field, there is a label 'Comments history table'. The history table is a table with four columns: 'STATUS', 'COMMENT', 'TIME STAMP', and 'USER'. The table contains several rows of data, including 'Reviewed by DM', 'DM review', 'Submitted', 'Certified', and 'Created'. The table is titled 'Comments' and has a search bar in the 'USER' column. The table is located below the 'Comments history table' label.

STATUS	COMMENT	TIME STAMP	USER
Reviewed by DM	Makes sense to me	02/05/2018 15:04:48	dm555.test555.fsa
DM review	DM review	02/04/2018 14:44:57	System User
Submitted	Submitted	02/04/2018 14:28:46	System User
Submitted	Submitted	02/04/2018 14:28:45	88001500.user
Submitted	Submitted	02/04/2018 14:28:45	88001500.user
Certified	Certified	02/04/2018 14:25:22	88001500.user
Certified	Certified	02/04/2018 14:25:22	88001500.user
Created	I am groot	02/03/2018 18:35:08	88001500.user

School Supporting Documents

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

School Supporting Documents

FILE NAME	FILE DESCRIPTION
Loans Stuff.xlsx	Adjustment supporting document
More loans stuff.docx	Another adjustment supporting document

Data Manager Supporting Documents

[ATTACH FILE](#)

FILE NAME	FILE DESCRIPTION	ACTION
No documents attached		

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

Data Manager Supporting Documents

[ATTACH FILE](#)

FILE NAME	FILE DESCRIPTION	ACTION
No documents attached		

Figure 102 Attach DM support document

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

eodra.testar / 785 (RAVEN/LAW RELIEF) - DM Response Manager [HELP](#) [LOG OUT](#)

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eCDR Appeals System

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

Document Upload

[BACK TO DM ADJUSTMENT](#)

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

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

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

Attach DMAAdjustment Supporting Document

Select File: [Choose File](#) No file chosen

File Description:

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

[FOIA](#) | [Privacy](#) | [Notices](#) | [usa.gov](#) | [ed.gov](#) | [whitehouse.gov](#)

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

FILE NAME	FILE DESCRIPTION	ACTION
README.txt	DMAAdjustment Supporting Document	REMOVE

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

Data Manager Supporting Documents

ATTACH FILE

FILE NAME	FILE DESCRIPTION	ACTION
No documents attached		

DM Adjustment Actions

CHANGE 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.

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

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Cases ▾ Reports ▾ Profile ▾

Change Data Manager

880015:Geographic Center University [BACK TO ADJUSTMENT](#)

Borrower Loans Information

Adjustment ID: 703864
Borrower SSN: 000000026
Borrower Name: Kxxxxxx, Mxxxxxxx J.
Case Type: 3-YR NDA
Number of Loans: 2
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
<input type="checkbox"/>	1715666	SF	555	RP	11/23/2009		07/14/2008	03/14/2009	06/12/2008	\$3,500.00	D
<input checked="" type="checkbox"/>	1715667	SU	555	RP	11/23/2009		07/14/2008	03/14/2009	06/12/2008	\$6,000.00	E

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

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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

880014.Geographic Center University



Figure 107 Requesting additional data button, DM user

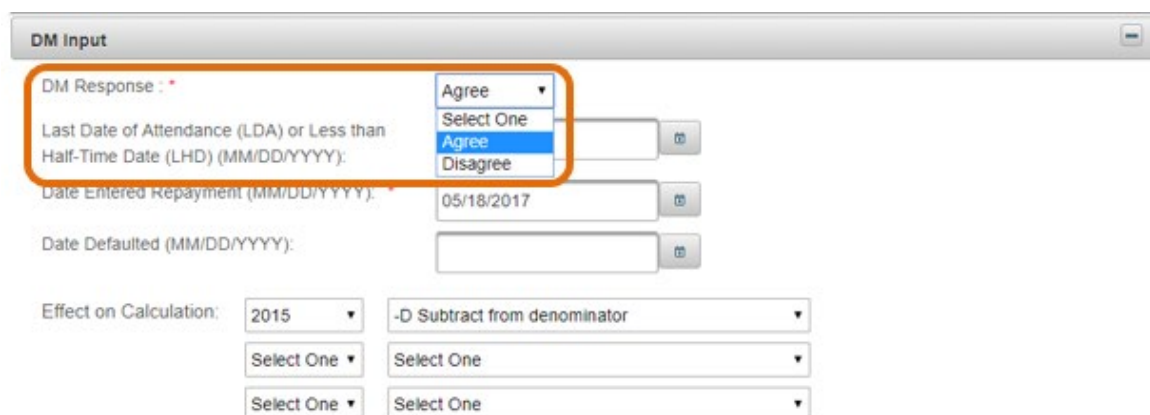
The Data Manager Adjustment Details page allows you to request more data from the institution. Select the [REQUEST ADDITIONAL DATA](#) button at the top right of the screen to request more information from the school.

A screenshot of the "Request additional data from school" page. At the top, a grey navigation bar shows the user "eodra.testar / 785 (RAVENLAW RELIEF) - DM Response Manager" and links for "HELP" and "LOG OUT". Below this is a banner for "Federal Student Aid" with the text "An OFFICE of the U.S. DEPARTMENT of EDUCATION" and "PROUD SPONSOR of the AMERICAN MIND™". To the right of the banner is the "eCDR Appeals System" logo. A dark navigation bar contains links for "Cases", "Reports", "Profile", and "Select Perspective". The main heading is "Request additional data from school" in green. Below it is the school name "999989.Martian Rover Institute of Technology". A light blue information box contains an icon and the text: "You may include a comment here. If you wish to include an attachment, please cancel and add attachment in the dm adjustment details page." Below this is a text input field with the placeholder "Request additional information from school:". At the bottom are two green buttons: "REQUEST MORE DATA" and "CANCEL". A footer at the very bottom contains links for "FOIA", "Privacy", "Notices", "usa.gov", "ed.gov", and "whitehouse.gov".

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

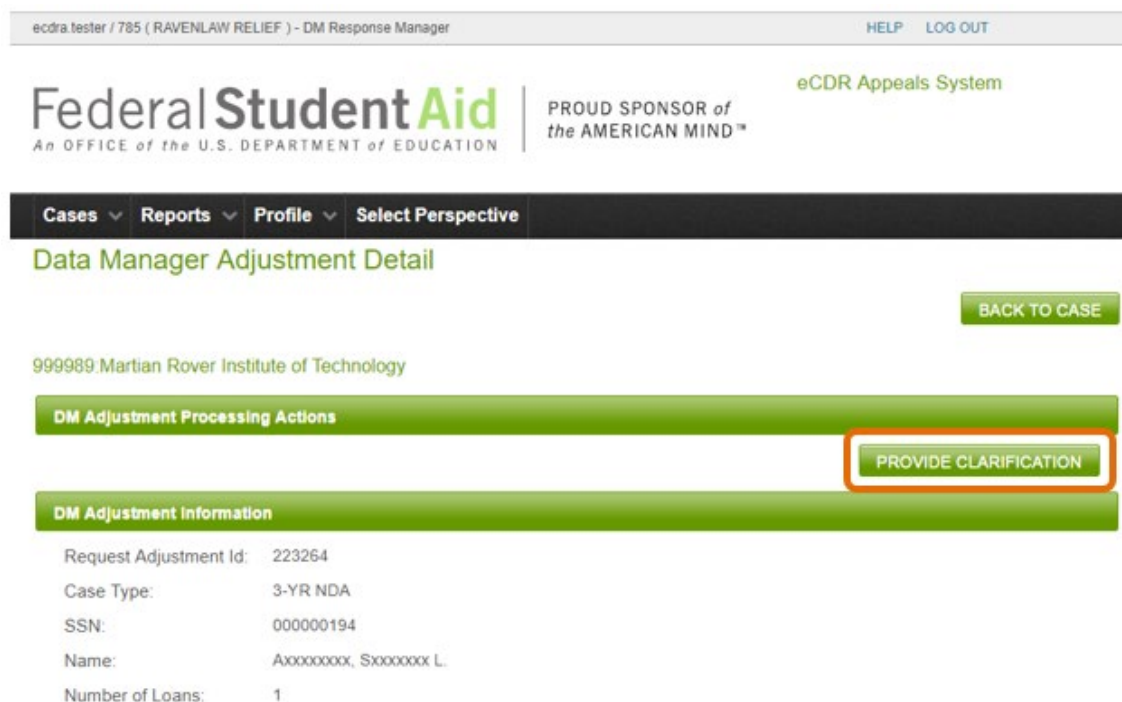


The screenshot shows the 'DM Input' form. The 'DM Response' dropdown menu is open, showing options: 'Agree' (selected), 'Select One', 'Agree', and 'Disagree'. Other fields include 'Last Date of Attendance (LDA) or Less than Half-Time Date (LHD) (MM/DD/YYYY)', 'Date Entered Repayment (MM/DD/YYYY)' (05/18/2017), 'Date Defaulted (MM/DD/YYYY)', 'Effect on Calculation' (2015), and three 'Select One' dropdowns for calculation details.

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



The screenshot shows the 'Data Manager Adjustment Detail' page. The 'DM Adjustment Processing Actions' section is highlighted, and the 'PROVIDE CLARIFICATION' button is circled in red. The 'DM Adjustment Information' section shows details for Request Adjustment Id: 223264, Case Type: 3-YR NDA, SSN: 000000194, Name: Axxxxxxx, Sxxxxxx L., and Number of Loans: 1.

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.

The screenshot shows the 'Provide clarification to school' page in the eCDR Appeals System. At the top, a header bar displays the user 'ecdra.testar / 785 (RAVENLAW RELIEF) - DM Response Manager' and links for 'HELP' and 'LOG OUT'. Below this is the 'Federal Student Aid' logo, with the tagline 'An OFFICE of the U.S. DEPARTMENT of EDUCATION' and 'PROUD SPONSOR of the AMERICAN MIND™'. To the right of the logo is the text 'eCDR Appeals System'. A navigation bar contains links for 'Cases', 'Reports', 'Profile', and 'Select Perspective'. The main heading is 'Provide clarification to school', followed by the school name '999989 Martian Rover Institute of Technology'. A light blue information box contains a message: 'You may include a comment here. If you wish to include an attachment, please cancel and add attachment in the dm adjustment details page.' Below this is a text input field labeled 'Provide clarification to school:'. At the bottom of the form are two green buttons: 'RETURN CLARIFICATION' and 'CANCEL'. The footer contains links for 'FOIA', 'Privacy', 'Notices', 'usa.gov', 'ed.gov', and 'whitehouse.gov'.

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

ecdra.test@785 (RAVENLAW RELIEF) - DM Response Manager [HELP](#) [LOG OUT](#)

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

Data Manager Adjustment Detail

[BACK TO CASE](#)

999989: Martian Rover Institute of Technology

DM Adjustment Processing Actions

[PROVIDE ADDITIONAL DATA](#)

DM Adjustment Information

Request Adjustment Id: 223289
Case Type: 3-YR NDA
SSN: 000000194
Name: Axxxxxxxx, Sxxxxxxxx L.
Number of Loans: 1

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.

ecdra.test@785 (RAVENLAW RELIEF) - DM Response Manager [HELP](#) [LOG OUT](#)

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

Provide additional data to Case worker

999989: Martian Rover Institute of Technology

i • You may include a comment here. If you wish to include an attachment, please cancel and add attachment in the dm adjustment details page.

Provide additional information to Case worker:

[FORWARD TO CASE WORKER](#) [CANCEL](#)

[FOIA](#) | [Privacy](#) | [Notices](#) | [usa.gov](#) | [ed.gov](#) | [whitehouse.gov](#)

Figure 113 Provide additional data correspondence page, DM user

eCDR Appeals NDA User Guide

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)

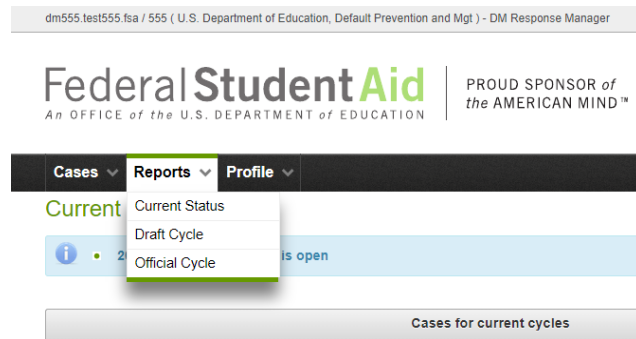


Figure 114 Reports menu options, DM user

Current Status (for DM)

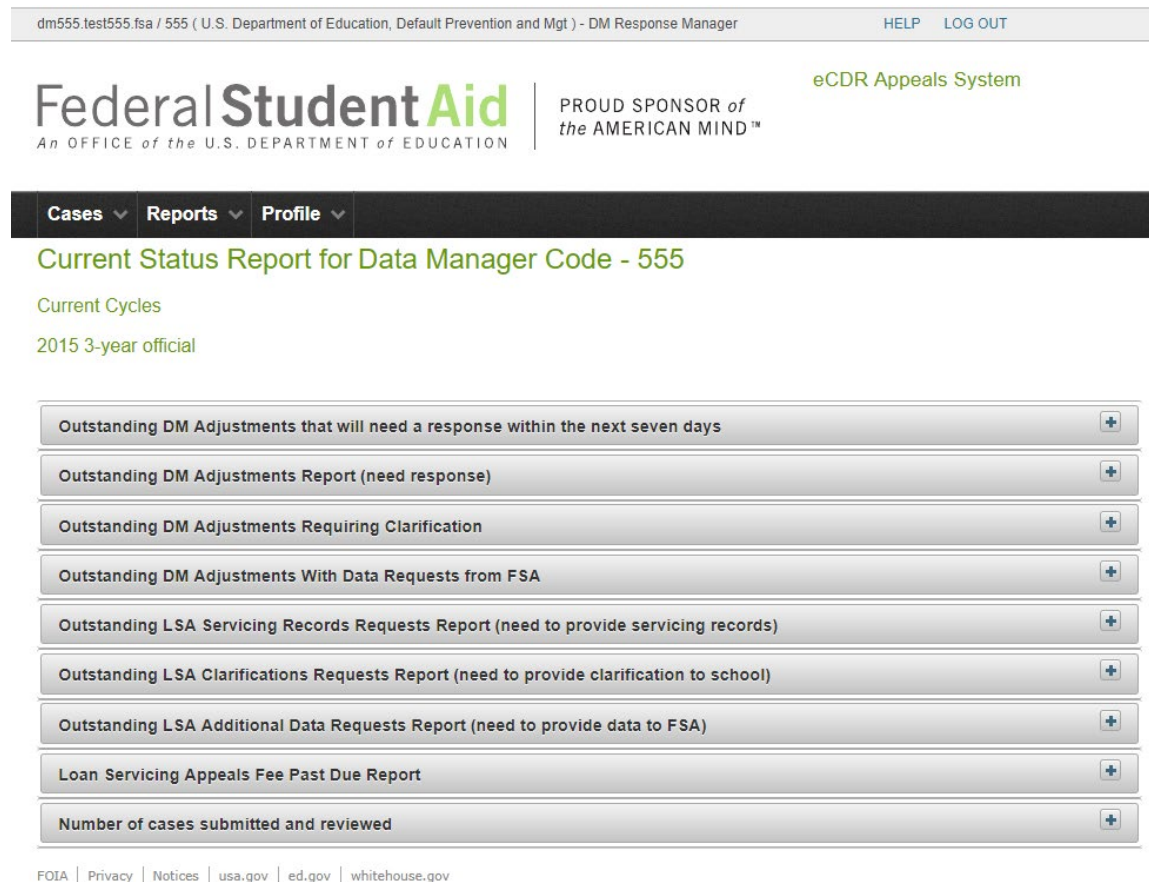


Figure 115 Current status reports page, DM user

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

Cases ▾Reports ▾Profile ▾

Current Status Report for Data Manager Code - 555

Current Cycles

2015 3-year official

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

Outstanding DM Adjustments Report (need response)

DM ADJUSTMENT ID ▾

CASE ID ▾

OPEID ▾

No cases found

Outstanding DM Adjustments Requiring Clarification

Outstanding DM Adjustments With Data Requests from FSA

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

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

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

Loan Servicing Appeals Fee Past Due Report

Number of cases submitted and reviewed

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

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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.

Outstanding DM Adjustments Requiring Clarifications

Lists DM adjustments for which schools requested clarification.

Outstanding DM Adjustments With Data Requests from FSA

Lists DM adjustments for which FSA has requested additional information.

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

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

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

List of clarification requests that schools are waiting for.

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

List of additional data requests that FSA is waiting for.

Loan Servicing Appeals Fee Past Due Report

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

Number of cases submitted and reviewed

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

Draft Cycle (for DM)

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Cases ▾ **Reports** ▾ **Profile** ▾

Draft Cycle Report for Data Manager Code - 555

Current Cycles

2015 3-year official

Select cycle for the reports

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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.

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

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Cases ▾ **Reports** ▾ **Profile** ▾

Draft Cycle Report for Data Manager Code - 555

Current Cycles

2015 3-year official

Select cycle for the reports

Changes to Loan Records

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

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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)

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

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Cases ▾ Reports ▾ Profile ▾

Official Cycle Report for Data Manager Code - 555

Current Cycles

2015 3-year official

Select cycle for the reports

Select One ▾
Select One
2015 3-year official

SUBMIT

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Figure 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.

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

Official Cycle Report for Data Manager Code - 555

Current Cycles

2015 3-year official

Select cycle for the reports 2015 3-year official

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	Jxxxx P. Bxxxxx	D1	05/06/2009	\$3,500.00		06/17/2014	
880014	Geographic Center University	000000026	Mxxxxxx J. Kxxxxxx	SF	04/24/2009	\$1,750.00		05/18/2017	
880014	Geographic Center University	000000026	Mxxxxxx J. Kxxxxxx	SU	04/24/2009	\$2,333.00		05/18/2017	
880014	Geographic Center University	000000026	Mxxxxxx J. Kxxxxxx	SF	06/12/2008	\$3,500.00		05/18/2017	
880014	Geographic Center University	000000026	Mxxxxxx 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

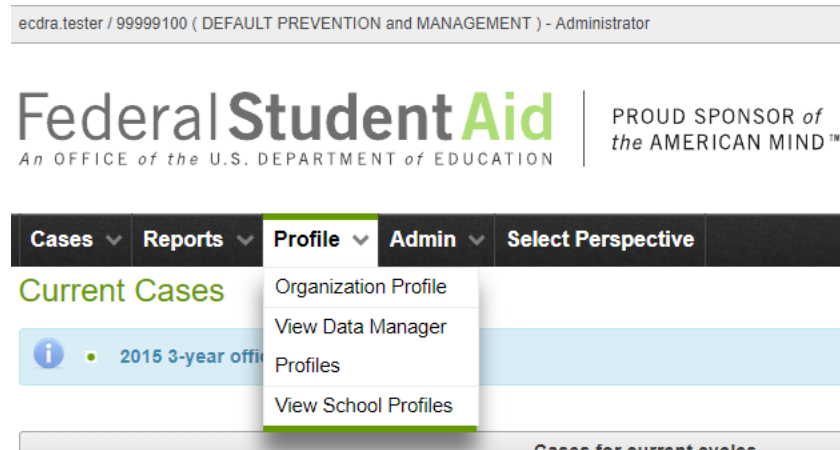


Figure 121 Profile menu options, FSA user

Organization Profile

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

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eCDR Appeals System

[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: *	<input type="text" value="DEFAULT PREVENTION and MANAGEMENT"/>
Address: *	<input type="text" value="830 First Street, NE"/>
City: *	<input type="text" value="WASHINGTON"/>
State:	<input type="text" value="DC - District of Columbia"/>
Zip:	<input type="text" value="20202"/>
Country:	<input type="text" value="USA"/>
Organization Email: *	<input type="text" value="ecdra.admin@ed.gov"/>
Alternate Email:	<input type="text" value="ecdra.other.admin@ed.gov"/>
Phone Number: *	<input type="text" value="202-555-1212"/>
Alternate Phone:	<input type="text"/>

Figure 122 FSA organization contact information

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

eCDR Appeals NDA User Guide

User Contact Information

Last Name: *

First Name: *

Email*: *

Phone: *

SAVE

CANCEL

Other User Contacts

NAME	EMAIL	PHONE
Jasons_Timo	jas@test.test	202-333-2222
casemanager_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.

View Data Manager Profiles

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

HELPLOG OUT

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Cases ▾Reports ▾Profile ▾Admin ▾Select Perspective ▾

View Profile

99999100:DEFAULT PREVENTION and MANAGEMENT

Please select the profile you wish to view.

Valid Data Manager Profiles

RESET FILTERS

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

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

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

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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.

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

Profile

99999100.DEFAULT PREVENTION and MANAGEMENT

Organization Information

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

User Contacts

LAST NAME	FIRST NAME	EMAIL	PHONE
No User Contacts Available			

Figure 125 Data Manager profile page

View School Profiles

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

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eCDR Appeals System

Cases ▾Reports ▾Profile ▾Admin ▾Select Perspective

View Profile

99999100:DEFAULT PREVENTION and MANAGEMENT

Please select the profile you wish to view.

Valid School Profiles

RESET FILTERS

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

ORGANIZATION NAME ▾	ORGANIZATION CODE - OPEID ▾
Air University	001001
Alabama Agricultural & Mechanical University	001002
Faulkner University	001003
University of Montevallo	001004
Alabama State University	001005
Alabama State University Mobile Center	001006
Central Alabama Community College	001007
Athens State University	001008
Auburn University	001009
Birmingham Baptist College	001010

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

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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.

eCDR Appeals NDA User Guide

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Cases ▾ Reports ▾ Profile ▾ Admin ▾ Select Perspective

Profile

99999100:DEFAULT PREVENTION and MANAGEMENT

Organization Information

Organization Name: Sturm Und Drang College of Diplomacy
Address: 4 UNDER THE SEA
City: SAN DIEGO
State: CA
Zip: 92128
Country:
Email: fernando.felixberto+sch999987@gmail.com
Alternate Email: mehedi.hasan@ed.gov
Phone Number: 585-555-1212
Alternate Phone:

User Contacts

LAST NAME	FIRST NAME	EMAIL	PHONE
No User Contacts Available			

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Figure 127 School profile page

Perspectives

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

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the AMERIC

Cases ▾ Reports ▾ Profile ▾ Admin ▾ Select Perspective

Select Perspective

Select One ▾
Select One
785 - DM Response Manager
583 - DM Response Manager
Administrator

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

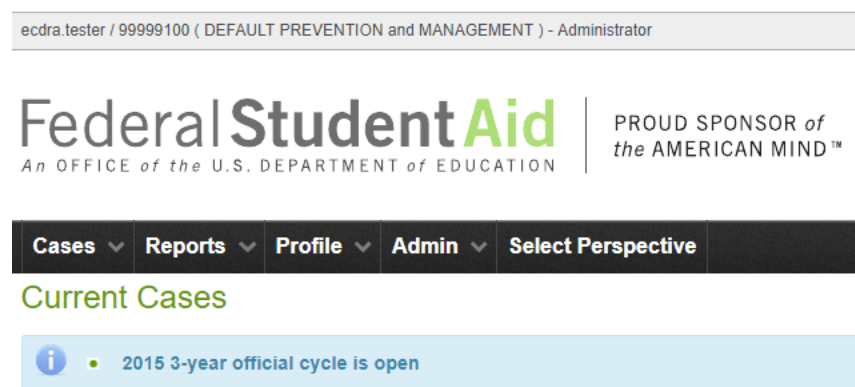


Figure 129 Menu bar, FSA user

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.

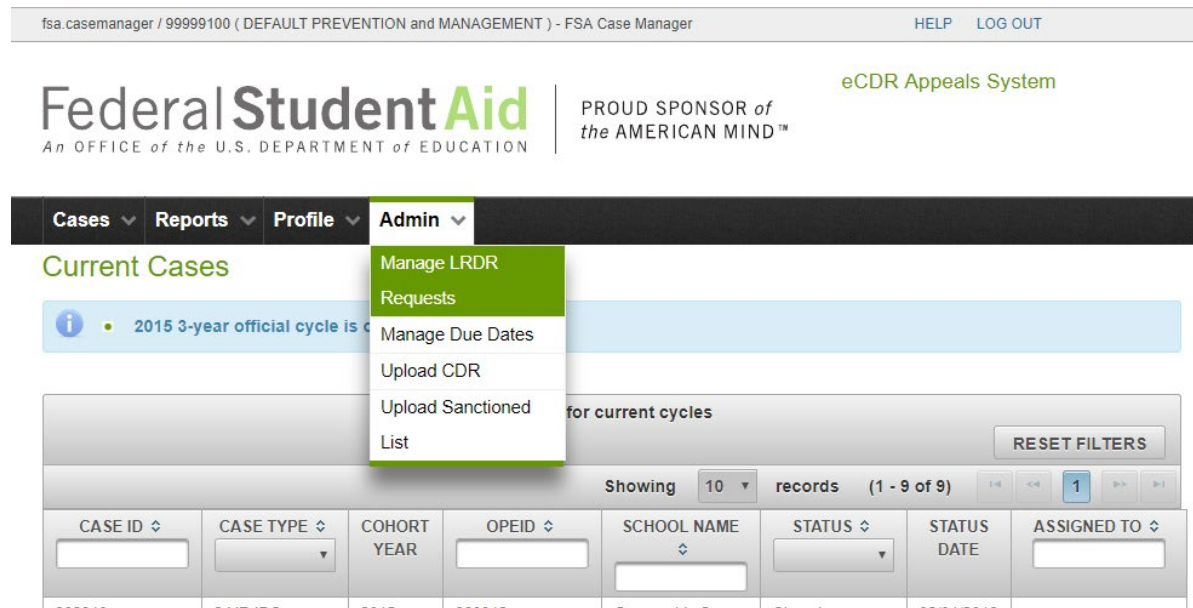


Figure 130 Manage LRDR requests menu option, FSA user

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.

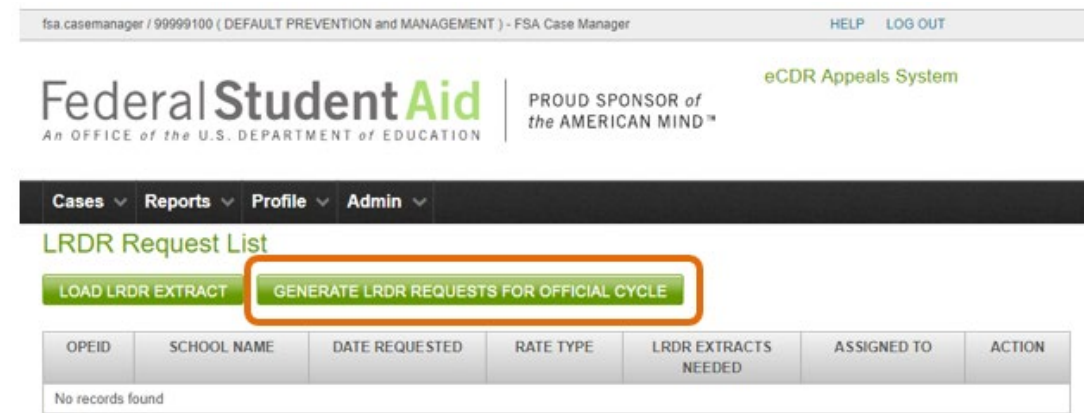


Figure 131 Generate LRDR requests button

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

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Cases ▾ Reports ▾ Profile ▾ Admin ▾

LRDR Request List

LOAD LRDR EXTRACT

GENERATE LRDR REQUESTS FOR OFFICIAL CYCLE

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

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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.

Upload LRDR Extract

880014:Geographic Center University

LRDR Request Processing Actions

LRDR request needs to be completed

LRDR Request Information and Upload

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

880014 2015 Official 3 year

880014 2015 Draft 3 year

880014 2014 Official 3 year

MARK AS NOT AVAILABLE

880014 2013 Official 3 year

MARK AS NOT AVAILABLE

Select LRDR Extract File No file chosen

SAVE

CANCEL

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.

eCDR Appeals NDA User Guide

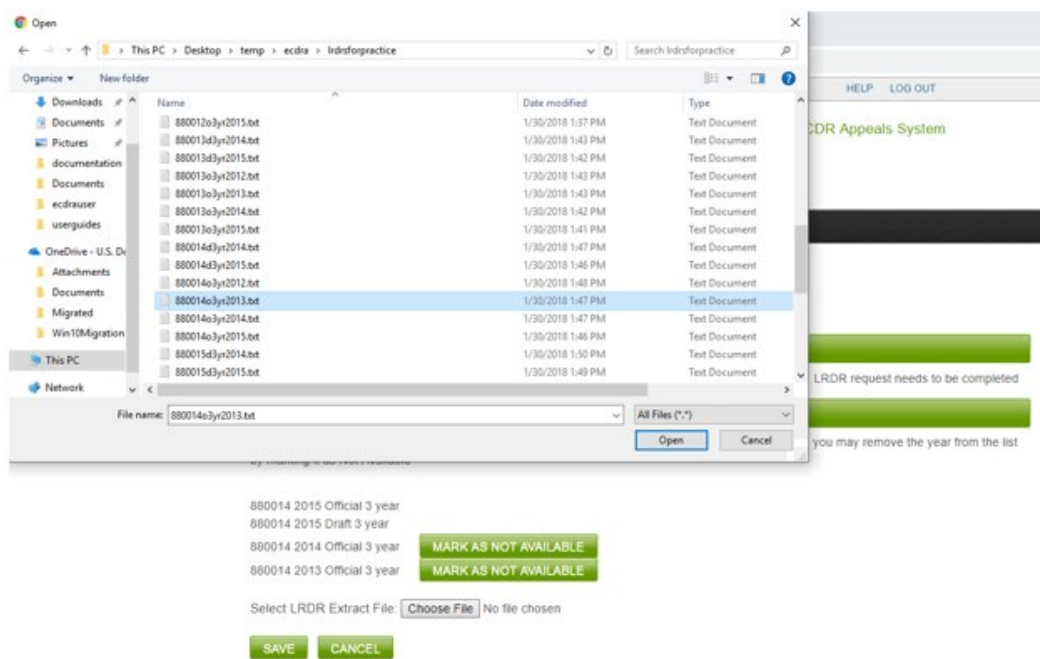


Figure 134 Browse for file to upload

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

Upload LRDR Extract

880014:Geographic Center University

LRDR Request Processing Actions

LRDR request needs to be completed

LRDR Request information and Upload

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

880014 2015 Official 3 year

880014 2015 Draft 3 year

880014 2014 Official 3 year

MARK AS NOT AVAILABLE

880014 2013 Official 3 year

MARK AS NOT AVAILABLE

Select LRDR Extract File **Choose File** 880014o3yr2013.txt

SAVE

CANCEL

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.

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

Upload LRDR Extract

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

880010:Geographic Center University 11

LRDR Request Processing Actions

LRDR request needs to be completed

LRDR Request Information and Upload

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

880010 2015 Official 3 year

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

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

Figure 136 LRDR file failed to load

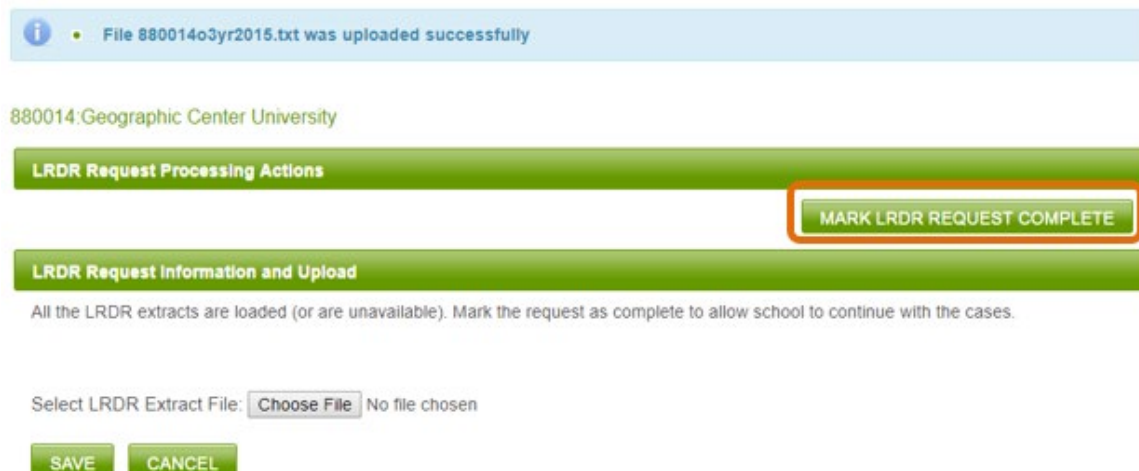
If there was a problem with the LRDR file, an error message will be displayed at the top of the page.

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

Upload LRDR Extract

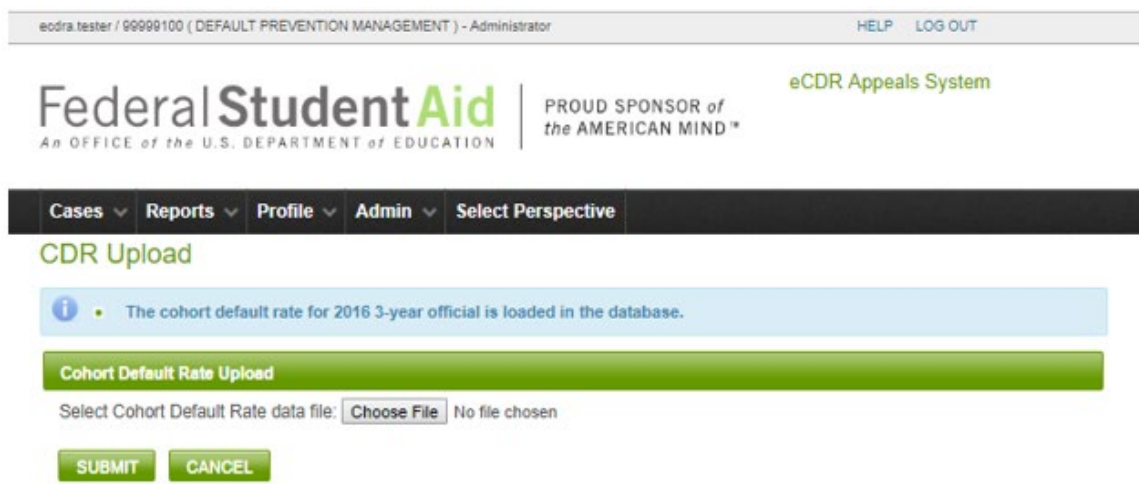


The screenshot shows a web interface for uploading LRDR extracts. At the top, a light blue message bar states: "File 880014o3yr2015.txt was uploaded successfully". Below this, the school name "880014:Geographic Center University" is displayed. A green header bar contains the text "LRDR Request Processing Actions". To the right of this bar, a button labeled "MARK LRDR REQUEST COMPLETE" is highlighted with an orange rectangle. Below the header, another green bar reads "LRDR Request Information and Upload". A paragraph of text follows: "All the LRDR extracts are loaded (or are unavailable). Mark the request as complete to allow school to continue with the cases." Below this text, there is a label "Select LRDR Extract File:" followed by a "Choose File" button and the text "No file chosen". At the bottom of this section are two green buttons: "SAVE" and "CANCEL".

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)



The screenshot shows the "CDR Upload" page in the eCDR Appeals System. At the top, a header bar displays the user "eodra.testar / 99999100 (DEFAULT PREVENTION MANAGEMENT) - Administrator" and links for "HELP" and "LOG OUT". Below the header is a banner for "Federal Student Aid" with the text "An OFFICE of the U.S. DEPARTMENT of EDUCATION" and "PROUD SPONSOR of the AMERICAN MIND™". To the right of the banner is the text "eCDR Appeals System". Below the banner is a dark navigation bar with the following menu items: "Cases", "Reports", "Profile", "Admin", and "Select Perspective". Below the navigation bar, the page title "CDR Upload" is displayed. A light blue message bar states: "The cohort default rate for 2016 3-year official is loaded in the database." Below this, a green header bar reads "Cohort Default Rate Upload". A label "Select Cohort Default Rate data file:" is followed by a "Choose File" button and the text "No file chosen". At the bottom are two green buttons: "SUBMIT" and "CANCEL".

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 **SUBMIT** button to upload the file.

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

Case lists

Current cases

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Cases ▾

Reports ▾

Profile ▾

Admin ▾

Current Cases

i

2015 3-year official cycle is open

Cases for current cycles

Showing 10 records (1 - 9 of 9)

RESET FILTERS

CASE ID ▾	CASE TYPE ▾	COHORT YEAR	OPEID ▾	SCHOOL NAME ▾	STATUS ▾	STATUS DATE	ASSIGNED TO ▾
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	<div>ecdra.testor</div> <div>ASSIGN</div>
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

eCDR Appeals NDA User Guide

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.

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

Figure 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.

Cases for current cycles					
<div> <div>Showing</div> <div>25</div> <div>records</div> <div>(1 - 15 of 15)</div> <div>1</div> </div>					
OPEID	SCHOOL NAME	STATUS	STATUS DATE	ASSIGNED TO	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
880012	Geographic Center University 13	Caseworker review	12/03/2018	fsa.caseworker	ASSIGN
111111	UNIVERSITY OF IO	Closed	11/15/2018		
880024	Geographic Center University 25	Perfected/Available for FSA review	11/19/2018	Not assigned	
880023	Geographic Center University 24	Closed	11/05/2018	Not assigned	
000000	Median River	Closed	11/03/2018	test.test.fsa	
				fsa.caseworker	
				fsa.casemanager	

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.

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Cases ▾

Reports ▾

Profile ▾

Admin ▾

Case Details

111111:UNIVERSITY OF IO

Workflow Actions

Case Information

Case ID:

303567

Cohort Year:

2015

Case Type:

3-YR NDA

Status:

Caseworker decision review

Status Date:

11/23/2018

Certification

• [badfile.html](#)

certified

• [badfile.html](#)

certified again

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Figure 142 Information available if case is assigned to somebody else

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)

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

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

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eCDR Appeals System

Cases ▾Reports ▾Profile ▾Admin ▾Select Perspective

Case Details

880014:Geographic Center University

[Print Case Details](#)

Workflow Actions

CLOSE CASEBACK TO CASE WORKER

Case Information

Case ID:	303919
Cohort Year:	2015
Case Type:	3-YR NDA
Status:	Case manager decision review
Status Date:	02/02/2018

Certification

- [This is certified.pdf](#) Certification
- [This is certified.docx](#) Certification for FSA

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 \(FSA USER\)](#).

Certification

- [This is certified.pdf](#) Certification
- [This is certified.docx](#) Certification for FSA

Comment:

SAVE **CANCEL**

Comments

Case Actions

CALCULATE REVISED RATES **GENERATE DECISION LETTER**

Adjustments

Showing 10 records (1 - 1 of 1) **RESET FILTERS**

ADJUSTMENT ID	BORROWER	NAME	ALLEGATION	NUMBER OF LOANS	EFFECT ON CALCULATION	STATUS
703824	000-00-0026	Kxxxxxx, Mxxxxxx J.	Incorrect date entered repayment	4	2015 -D	Case worker review complete

Showing 10 records (1 - 1 of 1)

SAVE **CANCEL**

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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)

Case Details

880014:Geographic Center University

[Print Case Details](#)

Workflow Actions

CLOSE CASE **BACK TO CASE WORKER**

Case Information

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.

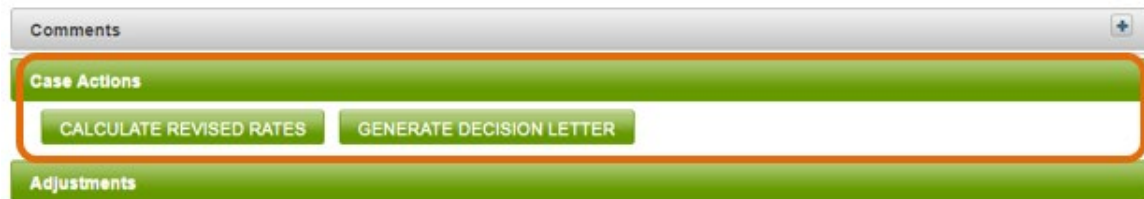


Figure 147 Case actions section, FSA user

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".

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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)

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	Perfected/Available for FSA review	02/02/2018	SELF-ASSIGN
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.testar
303912	3-YR LSA	2015	880011	Geographic Center University	Being prepared	02/01/2018	
303914	3-YR LSA	2015	880012	Geographic Center	Servicing records	02/01/2018	

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

[Print Case Details](#)

Workflow Actions

[COMPLETE CASEWORKER REVIEW](#)

Case Information

Figure 149 Case workflow actions, caseworker review

eCDR Appeals NDA User Guide

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.

Case Details

 **DM adjustment FSA review not completed** FSA needs to complete review of DM adjustment 1715588

880014:Geographic Center University

[Print Case Details](#)

Workflow Actions

COMPLETE CASEWORKER REVIEW

Case Information

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

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Current Cases

 2015 3-year official cycle is open

Cases for current cycles

Showing 10 records (1 - 9 of 9)

RESET FILTERS

CASE ID ▾	CASE TYPE ▾	COHORT YEAR	OPEID ▾	SCHOOL NAME ▾	STATUS ▾	STATUS DATE	ASSIGNED TO ▾
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	Available for case manager review	02/02/2018	Not assigned ASSIGN
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 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

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Cases ▾ Reports ▾ Profile ▾ Admin ▾

Current Cases

i • 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	Available for caseworker decision review	02/02/2018	Not assigned ASSIGN
303911	3-YR NDA	2015	880011	Geographic Center University	Closed	02/01/2018	
303916	3-YR UDA	2015	880013	Geographic Center University	Closed	02/02/2018	

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

eCDR Appeals NDA User Guide

Comment:

SAVE

CANCEL

Comments

Case Actions

CALCULATE REVISED RATES

GENERATE DECISION LETTER

Adjustments

Showing 10 records (1 - 1 of 1)

RESET FILTERS

ADJUSTMENT ID	BORROWER	NAME	ALLEGATION	NUMBER OF LOANS	EFFECT ON CALCULATION	STATUS
703824	000-00-0026	Kxxxxxx, Mxxxxxx J.	Incorrect date entered repayment	4	2015 -D	Case worker review complete

Showing 10 records (1 - 1 of 1)

RESET FILTERS

SAVE

CANCEL

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

Comments

Case Actions

CALCULATE REVISED RATES

GENERATE DECISION LETTER

Adjustments

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.

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Revised Rates Calculation

880014: Geographic Center University

Case Information

Case ID: 303919
Cohort Year: 2015
Case Type: 3-YR NDA
Status: Caseworker decision review
Status Date: 02/02/2018

Effect on calculation
based on adjustments that
DMs agreed to

BACK TO CASE

Effects on Calculation						
	2015 Numerator	2015 Denominator	2014 Numerator	2014 Denominator	2013 Numerator	2013 Denominator
Original Rates	193	3521	116	3023	59	2719
Revised Rates	193	3520	116	3023	59	2719
Effect on Calculation	0	-1	0	0	0	0

Revised Rates Input

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.

eCDR Appeals NDA User Guide

Effects on Calculation						
	2015 Numerator	2015 Denominator	2014 Numerator	2014 Denominator	2013 Numerator	2013 Denominator
Original Rates	193	3521	116	3023	59	2719
Revised Rates	193	3520	116	3023	59	2719
Effect on Calculation	0	-1	0	0	0	0

Revised Rates Input				
	Numerator	Denominator	CDR	Non-averaged CDR
2015	<input type="text" value="193"/>	<input type="text" value="3521"/>	<input type="text" value="5.4"/>	<input type="text"/>
2014	<input type="text" value="116"/>	<input type="text" value="3023"/>	<input type="text" value="3.8"/>	<input type="text"/>
2013	<input type="text" value="59"/>	<input type="text" value="2719"/>	<input type="text" value="2.1"/>	<input type="text"/>

Borrower Effects on Calculation						
BORROWER SSN	2015 NUMERATOR	2015 DENOMINATOR	2014 NUMERATOR	2014 DENOMINATOR	2013 NUMERATOR	2013 DENOMINATOR
<input type="text" value="000000026"/>	0	-1	0	0	0	0

Tabulation of effects on borrower usage codes

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

Comments	
<input type="text"/>	

Case Actions	
<input type="button" value="CALCULATE REVISED RATES"/>	<input type="button" value="GENERATE DECISION LETTER"/>

Adjustments
<input type="text"/>

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?

Is the school currently under sanction?

Did the school lose the adjustment or appeal?

Is the school subject to sanction?

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

Case Information

Figure 161 Complete caseworker decision review workflow action

eCDR Appeals NDA User Guide

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

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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	Available for case manager decision review	02/02/2018	Not assigned ASSIGN
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 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.



The screenshot shows a web interface for Case Manager decision review. At the top is a 'Comments' section with a plus icon. Below it is a green bar labeled 'Case Actions'. Under this bar are two buttons: 'CALCULATE REVISED RATES' and 'GENERATE DECISION LETTER'. Below these buttons is another green bar labeled 'Adjustments'.

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



The screenshot shows a web interface for Case Manager decision review. At the top right is a link 'Print Case Details'. Below it is a green bar labeled 'Workflow Actions'. Under this bar are two buttons: 'CLOSE CASE' and 'BACK TO CASE WORKER'. Below these buttons is another green bar labeled 'Case information'.

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

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Decision Letter

[BACK TO CASE](#)

Is the school an averaged school?

Is the school currently under sanction?

Did the school lose the adjustment or appeal?

Is the school subject to sanction?

[PREVIEW DECISION LETTER](#) [RESET DECISION LETTER](#) [FINALIZE DECISION LETTER](#) [CANCEL](#)

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.

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Decision Letter

[BACK TO CASE](#)

Is the school an averaged school?

Is the school currently under sanction?

Did the school lose the adjustment or appeal?

Is the school subject to sanction?

[PREVIEW DECISION LETTER](#) [RESET DECISION LETTER](#) [FINALIZE DECISION LETTER](#) [CANCEL](#)

Decision Letter Information

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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

Case Details

880014:Geographic Center University

[Print Case Details](#)

Workflow Actions

[CLOSE CASE](#) [BACK TO CASE WORKER](#)

Case Information

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.

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Case close confirmation

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- Please ensure that the changes to the default rate have been entered
- Please verify that the changes to the default rate are reflected in the decision letter

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

OK

CANCEL

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Figure 168 Confirmation page to close NDA

To verify, click **OK**. To keep the case open, assuming further review may be needed, click **CANCEL**.

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

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Adjustment Detail

BACK TO CASE

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Adjustment Processing Actions

No available workflow actions

Adjustment Information

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

School Input

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

Comments

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	

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

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Data Manager Adjustment Detail

BACK TO ADJUSTMENT

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DM Adjustment Processing Actions

REQUEST MORE DATA FROM DMFSA 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	ADJUSTME 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

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NDA User Guide

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

Comment input text field

Comments history table

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.test
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 workflow 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.

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Request additional data from DM

880014:Geographic Center University

 You may include a comment here.

Request additional information from DM:

REQUEST MORE DATA FROM DM

CANCEL

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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”.

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
1715731	555	6	2015 -D	Agree	Case worker review complete	01/29/2018	
1715733	785	1	2015 -D	Agree	In case worker review	01/29/2018	

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

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):

09/15/2015

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) : *

09/16/2015

Date Defaulted (MM/DD/YYYY):

Effect on Calculation:

2015 -D

FSA Input

☐ Caseworker review done

☒ Caseworker re-review needed

Comment:

SAVE

CANCEL

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

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Decision Letter

BACK TO CASE

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

PREVIEW DECISION LETTER

RESET DECISION LETTER

CANCEL

Decision Letter Information

▾ School Contact Information

Contact Name:
Contact Title:
Corporation Name:
Geographic Center University
1 UNDER THE STARS
BELLE FOURCHE
SD
57783

EDIT

RESET

▸ Subject

Figure 180 Decision letter page

eCDR Appeals NDA User Guide

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

Decision Letter Information

▼ School Contact Information

Contact Name:
Contact Title:
Corporation Name:
Geographic Center University
1 UNDER THE STARS
BELLE FOURCHE
SD
57783

EDIT **RESET**

- ▶ Subject
- ▶ Summary of Changed Cohort Default Rate(s)
- ▶ Section 1: Introduction
- ▶ Section 3a: Summary of three most recent Cohort Default Rates (CDR)
- ▶ Section 3b: CDR Summary Note
- ▶ Section 4: Subject to Sanction
- ▶ Section 5: Winning or Losing Benefits
- ▶ Section 6: Pending or non-pending Adjustment
- ▶ Section 7a: Correspondence Mailing Address
- ▶ Section 7b: Courier/Express Mailing Address
- ▶ Section 8: Enclosures

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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.

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Decision Letter

section1

Dear Dr. Smith:

This letter is official notification that the U.S. Department of Education (Department) has reviewed your school's fiscal year (FY) 2015. The Department has concluded that the information provided in this revision to your school's FY 2015 3-year cohort default rate calculation. Your school alleged that 1 borrower from the FY 2015 cohort default rate contained incorrect new data. The Department reviewed the allegation submitted, and determined that the borrower(s) was/were erroneously included in or excluded from your school's FY 2015 cohort default rate.

Please print-out the Case Details Summary (available on the Case Details page) for a summary of the allegations and how they affect your schools cohort default rate calculation. For information regarding how adding and subtracting loans affect the cohort

SAVE **CANCEL**

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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

Decision Letter Information

▾ School Contact Information

Contact Name:
Contact Title:
Corporation Name:
Geographic Center University
1 UNDER THE STARS
BELLE FOURCHE
SD
57783

EDIT **RESET**

▾ Subject

FY 2015 3-Year New Data Adjustment

EDIT **RESET**

▾ Summary of Changed Cohort Default Rate(s)

Changed Cohort Default Rates (CDR)

COHORT YEAR	ORIGINAL RATE	REVISED RATE
2015	5.4	5.3

▸ Section 1: Introduction

▸ Section 3a: Summary of three most recent Cohort Default Rates (CDR)

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

Decision Letter



The screenshot shows a form titled "Decision Letter" with four questions, each with a "No" button:

- 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

At the bottom, there are three buttons: "PREVIEW DECISION LETTER", "RESET DECISION LETTER" (highlighted with an orange border), and "CANCEL".

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

Decision Letter



The screenshot shows the same "Decision Letter" form as Figure 184, with the same four questions and "No" buttons. At the bottom, the buttons are "PREVIEW DECISION LETTER" (highlighted with an orange border), "RESET DECISION LETTER", and "CANCEL".

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

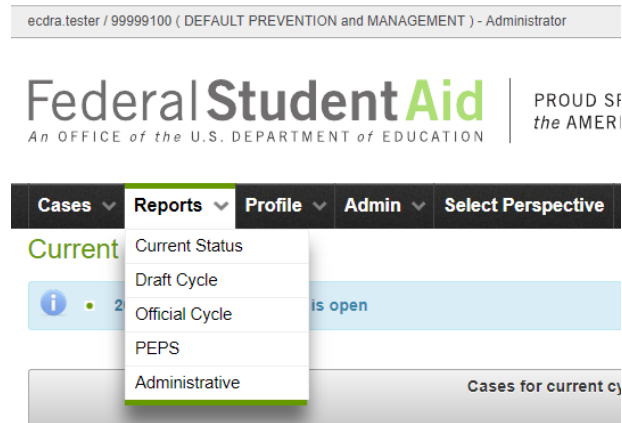


Figure 186 Reports menu options

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)

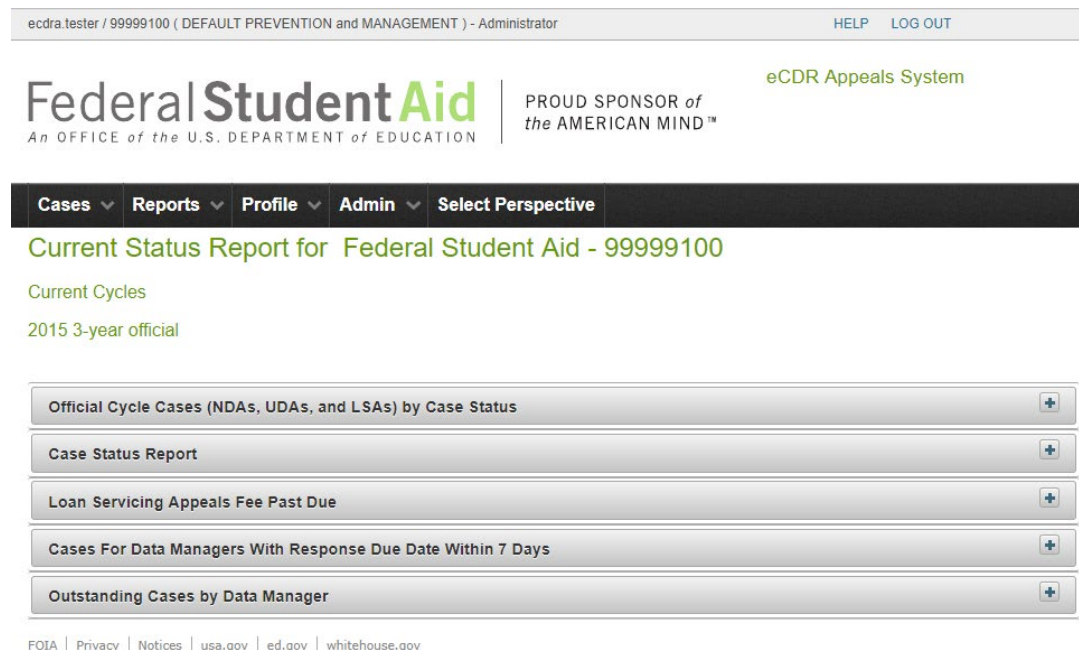


Figure 187 Current status reports page, reports collapsed

eCDR Appeals NDA User Guide

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

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

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

Case Status Report

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

Loan Servicing Appeals Fee Past Due

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

Cases for Data Managers With Response Due Date Within 7 Days

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

Outstanding Cases by Data Manager

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

Current Status Report for Federal Student Aid - 99999100

Current Cycles

2015 3-year official

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

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

Case Status Report

Loan Servicing Appeals Fee Past Due

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

Cases For Data Managers With Response Due Date Within 7 Days

Outstanding Cases by Data Manager

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Figure 188 Current status reports page, some reports expanded

Draft Cycle (for FSA)

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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 **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 **SUBMIT** to generate the reports.

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Cases ▾ Reports ▾ Profile ▾ Admin ▾ Select Perspective

Draft Cycle Report for Federal Student Aid - 99999100

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

Case Team Statistics

School Statistics

IDCs by School

IDCs by Data Manager

IDCs by State

Data Manager Statistics

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Figure 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.

Draft Cycle Report for Federal Student Aid - 99999100

Select cycle for the reports

2015 3-year draft ▼

SUBMIT

Case Team Statistics		-
REGION	NUMBER OF IDCs	
7	2	

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

IDCs by Data Manager		+
IDCs by State		+
Data Manager Statistics		+

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Figure 191 Draft cycle reports page, some reports expanded

Official Cycle (for FSA)

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eCDR Appeals System

Cases ▼	Reports ▼	Profile ▼	Admin ▼	Select Perspective
---------	-----------	-----------	---------	--------------------

Official Cycle Report for Federal Student Aid - 99999100

Select cycle for the reports

Select One ▼

SUBMIT

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Figure 192 Official cycle reports page, cycle selection

eCDR Appeals NDA User Guide

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

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

Official Cycle Report for Federal Student Aid - 99999100

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

- Appeals by Data Managers +
- Appeals by Schools +
- Appeals by State +
- IDC to UDA Comparison by Data Manager +
- Cohort Default Rate Changes Analysis +

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Figure 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.

Official Cycle Report for Federal Student Aid - 99999100

Select cycle for the reports

Appeals by Data Managers

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

Appeals by Schools

Appeals by State

IDC to UDA Comparison by Data Manager

Cohort Default Rate Changes Analysis

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Figure 194 Official cycle reports, some reports expanded

PEPS

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

PEPS Report for Federal Student Aid - 99999100

Select cycle for the reports

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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.

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Cases ▾ Reports ▾ Profile ▾ Admin ▾ Select Perspective

PEPS Report forFederal Student Aid - 99999100

Select cycle for the reports 2015 3-year official ▾

Case Status Reports (Initiated, Perfected, Resolved)

Adjusted Rates Report

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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.

PEPS Report forFederal Student Aid - 99999100

Select cycle for the reports 2015 3-year official ▾

Case Status Reports (Initiated, Perfected, Resolved)

Adjusted Rates Report

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

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Figure 197 PEPS report page, report expanded

Administrative

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Administrative Reports for Federal Student Aid - 99999100

Current Cycles

2015 3-year official

From date (inclusive) *

1/26/18

To date (inclusive) *

2/1/18

SUBMIT

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

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

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

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

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Figure 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) * 

To date (inclusive) * 

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

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

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

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

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

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

Figure 199 Administrative reports page, some reports expanded

Admin

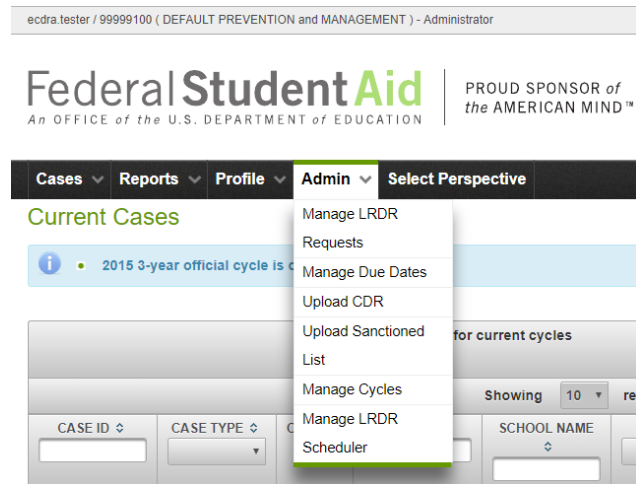


Figure 200 Admin menu, FSA user

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

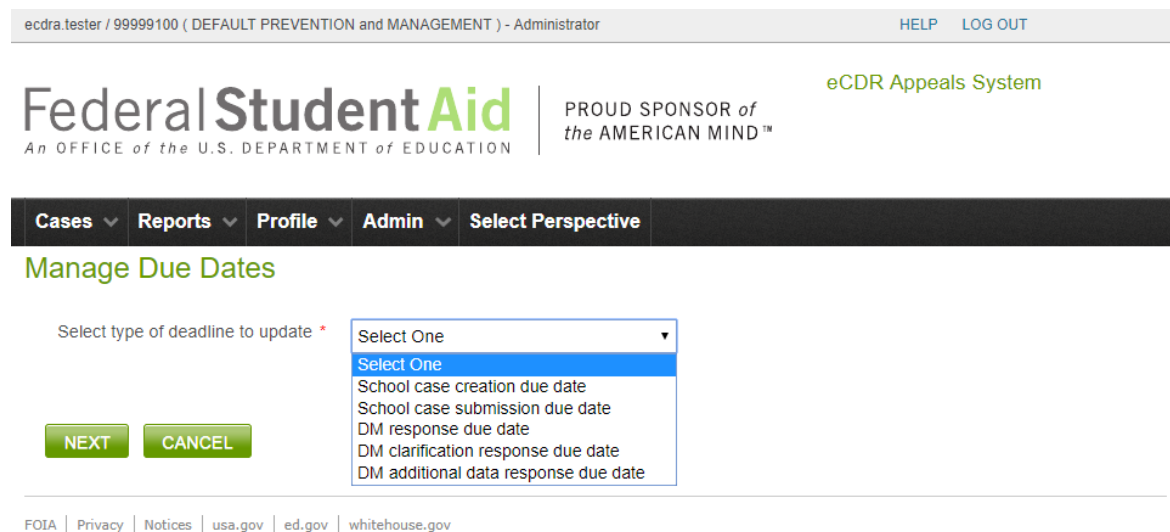


Figure 201 Manage due dates, deadline types

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

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Reports ▾

Profile ▾

Admin ▾

Select Perspective

School case creation due date

i

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

School case creation due date

School OPEID *

880072

Case Type *

3-YR NDA ▾

New Due Date *

2/10/2018

📅

Select authorized justification
for extending deadline *

Other ▾

Justification comment

School users were unable to log in earlier

SAVE

CANCEL

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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

School case submission due date

Number of Days to extend deadline *

7

Select authorized justification for extending deadline *

Other ▼

Justification comment

These things happen

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

Showing 10 ▼ records (1 - 2 of 2) 1

SAVE **CANCEL**

Figure 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

DM response due date information

Number of Days to extend deadline *

5

Select authorized justification for extending deadline *

System error ▼

Justification comment

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

Showing 10 records (1 - 9 of 9)

SAVE

CANCEL

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)

1-8

<-8

>-8

8-1

SELECTED	CASE ID	CASE TYPE	DM	DEADLINE
No cases found				

Showing 10 records (0 - 0 of 0)

1-8

<-8

>-8

8-1

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)

1-8

<-8

>-8

8-1

SELECTED	CASE ID	CASE TYPE	DM	DEADLINE
No cases found				

Showing 10 records (0 - 0 of 0)

1-8

<-8

>-8

8-1

SAVE

CANCEL

Figure 206 Extending deadline for DM additional data response

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

Upload CDR

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

Upload Sanctioned List

The screenshot shows the 'Sanctioned List Upload' page within the eCDR Appeals System. At the top, a header bar displays the user 'ecdra.testar / 99999100 (DEFAULT PREVENTION and MANAGEMENT) - Administrator' and links for 'HELP' and 'LOG OUT'. Below this is the 'Federal Student Aid' logo, with the text 'An OFFICE of the U.S. DEPARTMENT of EDUCATION' and 'PROUD SPONSOR of the AMERICAN MIND™'. To the right of the logo is the text 'eCDR Appeals System'. A navigation bar contains links for 'Cases', 'Reports', 'Profile', 'Admin', and 'Select Perspective'. The main heading is 'Sanctioned List Upload'. A light blue message box with an information icon states: 'The list of schools under sanction for the current cohort year (2015) is loaded in the database.' Below this is a section titled 'Sanctioned List Upload' containing the text 'Select schools under sanction file:' followed by a 'Choose File' button and the text 'No file chosen'. At the bottom of this section are two green buttons: 'SUBMIT' and 'CANCEL'. The footer of the page includes links for 'FOIA', 'Privacy', 'Notices', 'usa.gov', 'ed.gov', and 'whitehouse.gov'.

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Sanctioned List Upload

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

Sanctioned List Upload

Select schools under sanction file: No file chosen

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Figure 207 Sanctioned list upload page

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

Manage Cycles

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eCDR Appeals System

Cases ▾ Reports ▾ Profile ▾ Admin ▾ Select Perspective ▾

Manage Cycles

CREATE CYCLE

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

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Figure 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

Cycle

Cycle Information

Cycle Type

3-year official

Cohort Year

2015

LRDR Release Date *

Start Date *

Planned End Date *

Actual End Date

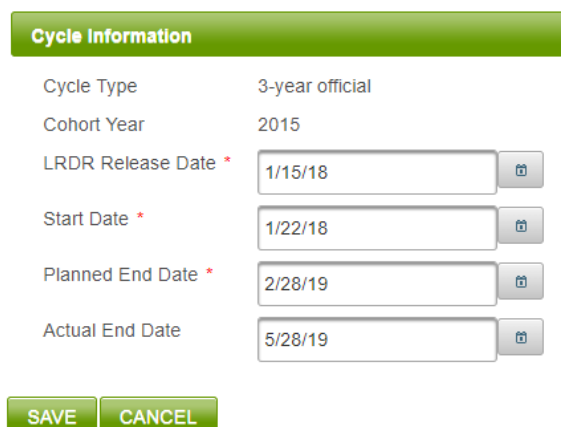
SAVE

CANCEL

Figure 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



Cycle Information

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

SAVE **CANCEL**

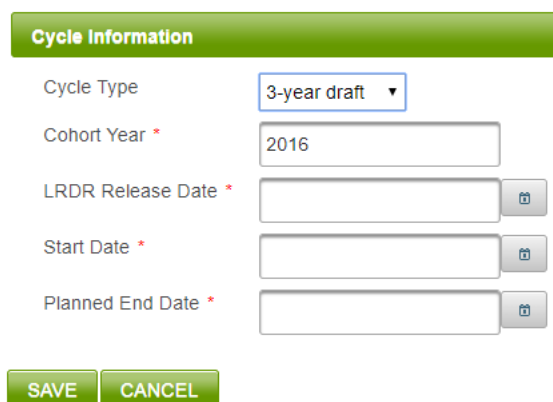
Figure 210 Cycle will be closed with actual end date

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



Cycle Information

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

SAVE **CANCEL**

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.