

**What's New with the  
Electronic Cohort Default Rate  
Appeals System (eCDR Appeals)**

**Version 5.0**

**September 6, 2015**

---

---

**DOCUMENT VERSION HISTORY**

<b>Version</b>	<b>Release Date</b>	<b>Summary of Changes</b>	<b>Name</b>
5.0	September 6, 2015	Initial release of What's New guide. Publication targeted to coincide with the technology stack upgrade to be placed in production for the Official CDR Cycle in Fall 2015 (Release 5.0).	Federal Student Aid TO-ADG Business Analysis Team

---

---

**TABLE OF CONTENTS**

**1. Introduction..... 4**

    1.1 *Background..... 4*

    1.2 *User Guide Structure ..... 4*

**2. Menus and Navigation..... 5**

    2.1 *Login & Perspective ..... 5*

    2.2 *Menus..... 5*

**3. Usability Enhancements ..... 6**

    3.1 *Browser Version..... 6*

    3.2 *Table Sort & Filter Options..... 6*

    3.3 *Date Data Entry..... 9*

    3.4 *Expand/Collapse Screen Section ..... 9*

    3.5 *Viewing Reports..... 10*

**4. Page Contents Changes ..... 12**

    4.1 *Unused Fields Removed..... 12*

    4.2 *Minor Terminology Change..... 13*

---

---

# 1. INTRODUCTION

## 1.1 **Background**

Consistent with law, the U.S. Department of Education (the Department) provides Schools the opportunity to file challenges, adjustments and appeals to their published Draft and Official Cohort Default Rates (CDR). 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)

In 2015, the Department completed an upgrade of the technical components of the eCDR Appeals, resulting in usability enhancements and improved screen layouts. The purpose of the “*What’s New with eCDR Appeals*” (*What’s New*) user guide is to summarize these changes in a single location.

Because the essential functions and processes for IDC, UDA, NDA and LSA cases have not changed, and the existing eCDR Appeals user guides remain accurate in this respect, the Department decided not to rework the existing user guides at this time. At some future date, the Department may rewrite the eCDR Appeals user guides by replacing screenshots, editing various sections, and possibly restructuring the guides.

## 1.2 **User Guide Structure**

The *What’s New* guide offers a brief description of the effects of the upgrade:

- Section 2: Menus and Navigation
- Section 3: Usability Enhancements
- Section 4: Page Contents Changes

## 2. MENUS AND NAVIGATION

### 2.1 Login & Perspective

Login is still provided by Federal Student Aid's Access and Identity Management System (AIMS) and hasn't changed. If you represent multiple organizations, you will still be required to select the organization you want to work with (known in eCDR Appeals as a "perspective").

### 2.2 Menus

Once you are logged in to the eCDR Appeals system, you will be able to navigate to the various sections of the website using the top navigation menu.

Under the upgrade, as depicted below, each submenu presents vertically as a pull down of options to select from, rather than horizontally.

Figure 2-1: Cases' Submenu as Vertical Pull Down



Additionally, as depicted below, the Help and Logout options have moved to the very top of the screen.

Figure 2-2: Help and Logout Options Moved to Top of Screen



By comparison, the old navigational menus are as shown below.

Figure 2-3: Old Navigational Menus as Seen by a School User



## 3. USABILITY ENHANCEMENTS

### 3.1 Browser Version

The enhancements discussed under the present section work best when using recent versions of most browsers. In particular, if using Windows Internet Explorer (IE), you must use IE9 or a later version for the enhanced capabilities to work correctly.

### 3.2 Table Sort & Filter Options

Several screens include tables that may grow rather large. eCDR Appeals now offers an option to sort tables, and has enhanced the ability to readily filter a table's contents.

Each column that can be sorted exhibits the following icon:

Figure 3-1: Sort Icon



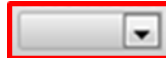
Each column that can be filtered by typing a partial or full value for the item you are looking for includes an editable blank field:

Figure 3-2: Editable Filter Field



And where a value can be selected from a pull down menu, the following icon is present. Clicking on the down arrow will display the valid values you can select from.

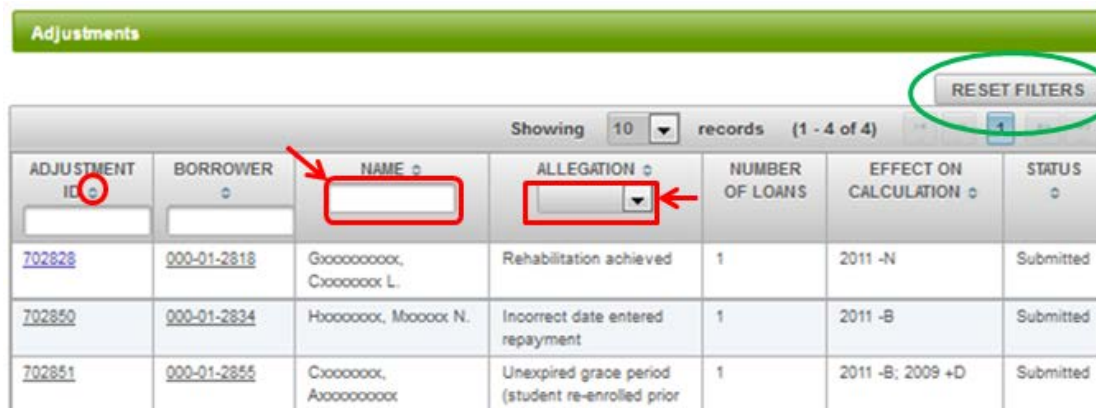
Figure 3-3: Menu to Select a Valid Value for the Field



### Sorting and Filtering Adjustments within a Case

For example, a School User can view the adjustments within a case as illustrated below. Filters can be reset at any time, again displaying the entire list of adjustments.

Figure 3-4: Adjustments Table Showing Sort and Filter Functions



ADJUSTMENT ID	BORROWER	NAME	ALLEGATION	NUMBER OF LOANS	EFFECT ON CALCULATION	STATUS
<a href="#">702828</a>	<a href="#">000-01-2818</a>	Gxxxxxxxxx, Cxxxxxxxx L.	Rehabilitation achieved	1	2011 -N	Submitted
<a href="#">702850</a>	<a href="#">000-01-2834</a>	Hxxxxxxxx, Mxxxxx N.	Incorrect date entered repayment	1	2011 -B	Submitted
<a href="#">702851</a>	<a href="#">000-01-2855</a>	Cxxxxxxxx, Axxxxxxxx	Unexpired grace period (student re-enrolled prior expiration of grace)	1	2011 -B; 2009 +D	Submitted

By comparison, the old Adjustments section of the Case Details page was as shown below.

Figure 3-5: Old Adjustments Section of Case Details Page, Showing Search Functions

The screenshot shows the 'Adjustments' section of a case details page. At the top, there is a search bar with the text 'You may search by adjustment id, borrower's SSN, or borrower's last name'. Below the search bar are three buttons: 'SEARCH', 'SHOW ALL ADJUSTMENTS', and 'ADVANCED SEARCH'. The search bar and buttons are highlighted with a red border. Below the search bar is a table titled 'Requested Adjustments' with columns: Adjustment Id, Borrower, Allegation, Number of Loans, Effect on Calculation, and Status. The table contains one row of data.

Adjustment Id	Borrower	Allegation	Number of Loans	Effect on Calculation	Status
<a href="#">771020</a>	<a href="#">000889069</a>	Borrower has multiple loans in one cohort default rate calculation that belong in several cohort default rate calculations	3	-N 2010	Created

Showing 1 to 1 of 1

## Sorting and Filtering Report Contents

The contents of many reports can be sorted and filtered. Using a School's Current Status Reports Page as an example below you can see the columns that can be sorted and filtered.

Figure 3-6: Current Status Report Showing Filter and Sort Functions

The screenshot shows the 'Current Status Reports for OPEID - 880081' page. It has a navigation bar with 'Cases', 'Reports', and 'Profile' dropdowns. Below the navigation bar is the title 'Current Status Reports for OPEID - 880081' and a sub-section 'Current Cycles' with '2011 3-year official'. Below this is a section titled 'Loan Servicing Appeal (LSA) records requests that require fees'. At the bottom of this section is a table with columns: LSAPPEAL DM ID, CASE ID, DATA MANAGER, and DATE FEES DUE BY. The 'CASE ID' and 'DATA MANAGER' columns have dropdown arrows and are highlighted with a red box. Below the table, it says 'No cases found'.

LSAPPEAL DM ID	CASE ID	DATA MANAGER	DATE FEES DUE BY
No cases found			

By comparison, as depicted below, reports' contents could not previously be sorted.

Figure 3-7: Old Report Contents Neither Sortable Nor Filterable

The screenshot shows the 'Current Status Reports' page for 'OPE ID: 880016 - Geographic Center University'. It lists 'Current Cycles: 2010 - Three-year, 2011 - Two-year'. Below this is a section titled 'Requests for additional information' with a table that has columns: DMAdjustment Id, Case File Id, Data Manager, and Provide additional information by. The table is empty. Below this is a section titled 'Loan Servicing Appeal (LSA) records request that requires fees' with a table that has columns: LSAPealDM Id, Case File Id, Data Manager, and Date Fees Due By. The table contains two rows of data.

DMAdjustment Id	Case File Id	Data Manager	Provide additional information by
No requests for additional information from Data Managers.			

LSAPealDM Id	Case File Id	Data Manager	Date Fees Due By
<a href="#">4007</a>	303160	555	09/05/2013
<a href="#">4011</a>	303160	555	09/05/2013

## Sorting and Filtering Current or Past Cases

Sorting and filtering current or past cases can be particularly helpful for Data Managers (DM) and Federal Student Aid (FSA). The columns for which a user can apply sort or filter will vary. For example, School Name is not a sortable value for the school since a school only sees its own cases. A DM on the other hand can sort and filter on School Name because they see all cases they are involved in.

The composite picture below shows a table of current cases for a school, for a DM and for FSA.

All users can sort and filter by Case ID, by Case Type and by Status. The DM and FSA Users can also sort and filter by OPEID and School Name. And FSA can sort and filter by personnel assigned to each case.

**Figure 3-8: Current Cases Table - School, DM and FSA Views of Sort and Filter Functions**

The figure shows three overlapping screenshots of the 'Current Cases' table from different user perspectives. Red boxes highlight the filterable columns in each view:

- School User View:** CASE ID, CASE TYPE, and STATUS.
- Data Manager User View:** CASE ID, CASE TYPE, OPEID, SCHOOL NAME, and STATUS.
- FSA User View:** CASE ID, CASE TYPE, OPEID, SCHOOL NAME, STATUS, and ASSIGNED TO.

CASE ID	CASE TYPE	COHORT YEAR	OPEID	SCHOOL NAME	STATUS	STATUS DATE
303460	3-YR IDC	2011	880036	Geographic Center University 37	Perfected/Available for FSA review	03/01/2014
303468	3-YR LSA	2011	880036	Geographic Center University 37	Servicing records	10/09/2014

CASE ID	CASE TYPE	COHORT YEAR	OPEID	SCHOOL NAME	STATUS	STATUS DATE	DM RESPONSE DUE DATE
303466	3-YR IDC	2011	880028	Geographic Center University 29	Data Manager review	03/21/2014	04/23/2014
303466	3-YR IDC	2011	880027	Geographic Center	Data Manager	03/21/2014	04/23/2014

CASE ID	CASE TYPE	COHORT YEAR	OPEID	SCHOOL NAME	STATUS	STATUS DATE	ASSIGNED TO
303483	3-YR IDC	2011	880044	Geographic Center University 45	Closed	02/25/2014	
303484	3-YR IDC	2011	880042	Geographic Center University 43	Available for case manager review	02/25/2014	Not assigned
303489	3-YR IDC	2011	880037	Geographic Center University 38	Perfected/Available for FSA review	02/29/2014	Not assigned

By comparison, the old ability to search cases was as pictured below:

**Figure 3-9: Old Current Cases Page's Search Function**

The screenshot shows the old 'Current Cases' page search function. A red box highlights the search input field and buttons:

You may search by case ID, OPEID, or case status.

SEARCH SHOW ALL

Case ID	Case Type	Cohort Year	OPEID	School Name	Status	Status Date	Response Due Date
300100	2-YR IDC	2010	880000	Geographic Center University	Submitted	02/18/2012	

Showing 1 to 1 of 1



### 3.3 Date Data Entry

When developing a case, the School User must frequently enter dates. Similarly, when responding to a case, the DM and FSA Users might need to enter dates as well.

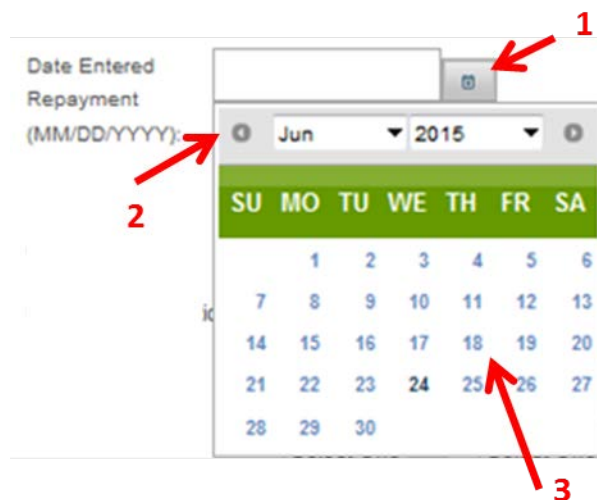
Every editable date field is accompanied by a small calendar icon.

Figure 3-10: Calendar Icon



As depicted below, in addition to typing in the date (MM/DD/YYYY), the user can now pick a date from a calendar pop-up function. Clicking on the calendar icon (1) opens up a calendar, initially displaying the current month with today's date bolded. The user can navigate (2) to a particular month and year as well as scroll back and forward through the months. When on the month of interest, the user clicks on the date of choice (3) to select it.

Figure 3-11: Details of the Date Selection Function



By comparison, under the old system, the only option was for the user to type the date in the date field, as shown below.

Figure 3-12: Old Date Entry Fields



### 3.4 Expand/Collapse Screen Section

The case details and adjustments pages include many sections. When working on a particular area, other sections can be distracting. It is now possible to collapse sections, and re-expand them at any time.

At the right of each section heading, you will find a + (plus) or – (minus) sign that denotes whether the section is collapsed and can be expanded, respectively is expanded and can be collapsed.

Figure 3-13: Plus and Minus Signs Indicate Section Can be Respectively Expanded or Collapsed



In the example below, the Comments section has been collapsed, while the Supporting Documents is expanded. Simply click on the + sign to see more, and on the – sign to see less.

Figure 3-14: Illustration of Collapsed Comments and Expanded Supporting Documents Sections

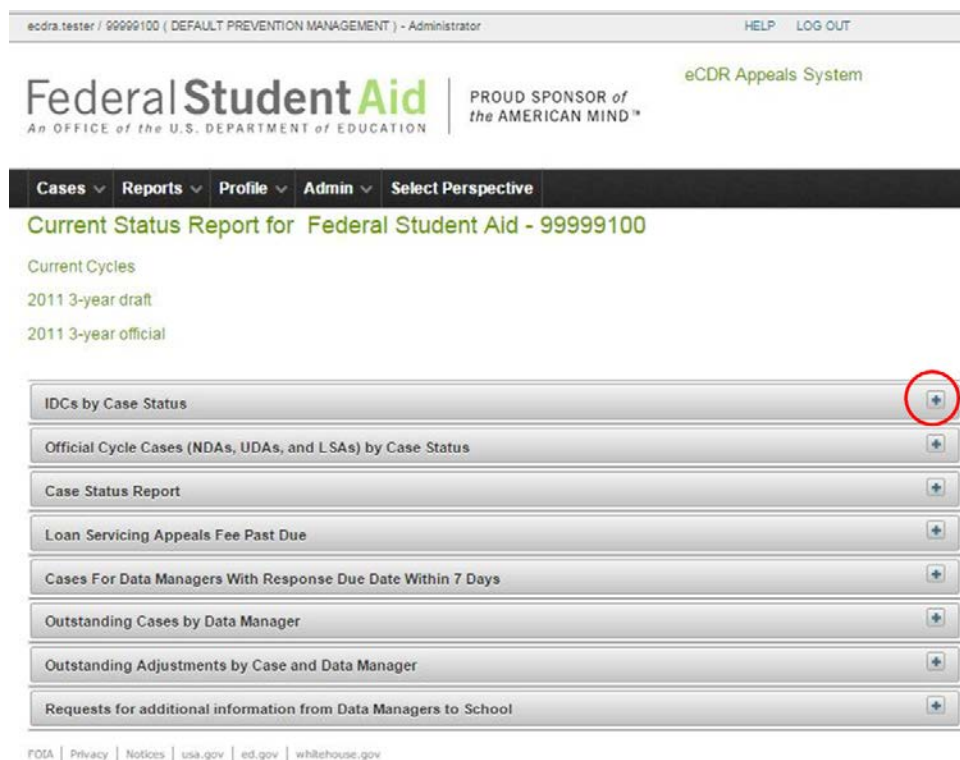


By comparison, all sections of a page were always fully expanded under the old system.

### 3.5 Viewing Reports

When using the Reports section of the eCDR Appeals, the page starts with a listing of all reports available to the user based on their role, such as illustrated below with the list of Current Status Reports available to an FSA User.

Figure 3-15: Current Status Reports Page Showing Available Reports



Each report title can be expanded to display the report's contents by clicking on the + (plus) sign at the right of the report title. Once the report is expanded, there is a - (minus) sign at the right of the report title. Clicking on the - sign will collapse the section to again only display the report's title.

Some reports offer the sort and filter options described under Section 3.2 above. Filtering is removed by blanking out all filter fields.

Some reports also offer the ability to export the report's contents to a spreadsheet. A small spreadsheet icon displays at the top right of the report. Clicking on it will initiate the export and enable you to select a location on your local computer to save the report.

For example, as we see in our example below, a DM has expanded two of the reports available to them. Each report offers the ability to sort and filter on pertinent fields, as well as the option to export the report's contents to a spreadsheet. In our example, there is only one entry in each report, making sorting and filtering unnecessary. When a report is lengthy, the ability to limit the entries that display on the report is valuable.

Figure 3-16: Current Status Reports Showing Sort/Filter and Export Options

Expand/Collapse Report Section Using +/- Sign

Export Contents To Excel

Sort/Filter Report's Contents

DM ADJUSTMENT ID	CASE ID	OPEID
1582312	303785	880030

APPEAL ID	CASE ID	OPEID	COHORT YEAR	STATUS	DATE RESPONSE DUE BY
5430	303817	880060	2011	Clarification Requested	10/05/2014

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

## 4. PAGE CONTENTS CHANGES

Screens and pages are largely laid out as they were previously. Some unused fields have been removed, and there a very minor terminology difference on the Case Details Page. They are highlighted below.

### 4.1 Unused Fields Removed

Most notable is the Case Information section of the Case Details Page. Several fields were never used, and have been removed from the display. They include Cohort Default Rate, New Official Percentage, Old Official Percentage, Program Type, Appeal Outcome, Appeal Sanction and New Numerator/Denominator. The OPEID and School's Name now display immediately below the Case Details title for the page.

The OPE ID / School Name and the new Case Information section are as illustrated below.

Figure 4-1: Case Details Page School and Case Information

**Case Details**

001085:University of Arkansas at Monticello

**Workflow Actions**

**Case Information**

Case ID: 303743  
Cohort Year: 2011  
Case Type: 3-YR IDC  
Status: Closed  
Status Date: 03/03/2014

By comparison, under the old system, the Case Information section displayed all unused fields, as illustrated below.

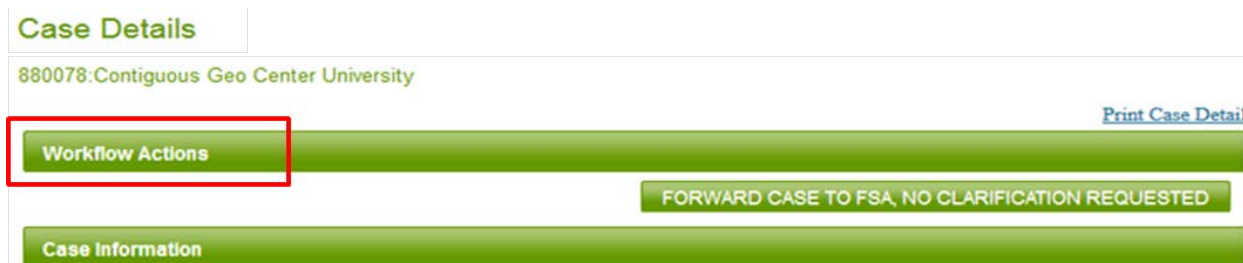
Figure 4-2: Old Case Information Section

Case Information		
Case: 300100	OPEID: 880000	Cohort Default Rate:
Case Type: 2-YR IDC	Cohort Fiscal Year: 2010	New Official Percentage:
Case Status: Submitted	Status Date: 02/18/2012	Old Official Percentage:
Program Type:	Appeal Outcome:	Appeal Sanction:
		New Numerator/Denominator:

## 4.2 Minor Terminology Change

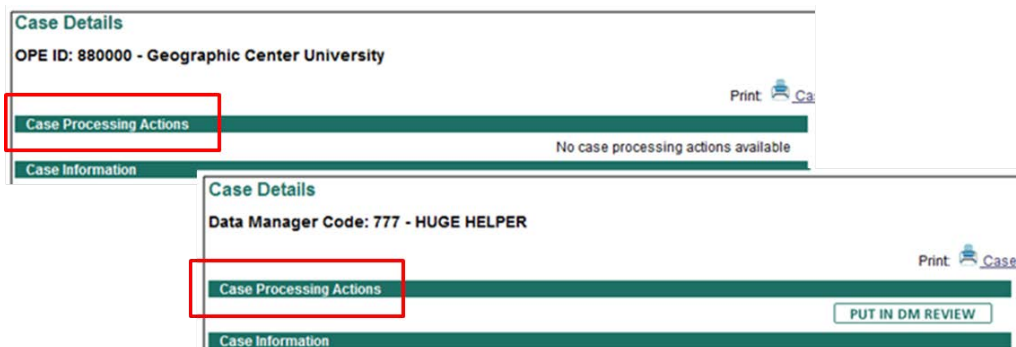
On the Case Details Page, the first section pertains to the processing actions that can be taken with the case. This section strictly focuses on actions whereby the case as a whole can (or cannot) move to another stage in the workflow. The section is now named “Workflow Actions,” as depicted below.

Figure 4-3: Case Details Page Showing Workflow Actions Section



By comparison, the section was previously named “Case Processing Actions.” Examples are provided below.

Figure 4-4: Old Case Details Page Showing Case Processing Actions Section



The purpose of the section has not changed, only its title on the screen.