

Experimental Sites Webinar:

Experimental Sites: Loan Reporting Templates

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Preconference Objectives

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- The Experimental Sites Data Collection Instrument

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- Reporting Details (by Experiment)

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- Action Plans

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- Questions

Required Reporting Data

Study Abroad

Single Disbursement

Early Disbursement

Loan Amounts

Unequal Disbursements

Reduced Unsubsidized Eligibility

Reporting Period (2014-15 Award Year)

- Ends December 11, 2015
- 2014-15 Data ONLY - unless
 - 2014-15 was your first year of participation or
 - You defined a *new* group for the reduced or unequal disbursements experiment(s) during 2014-15

Online Resources

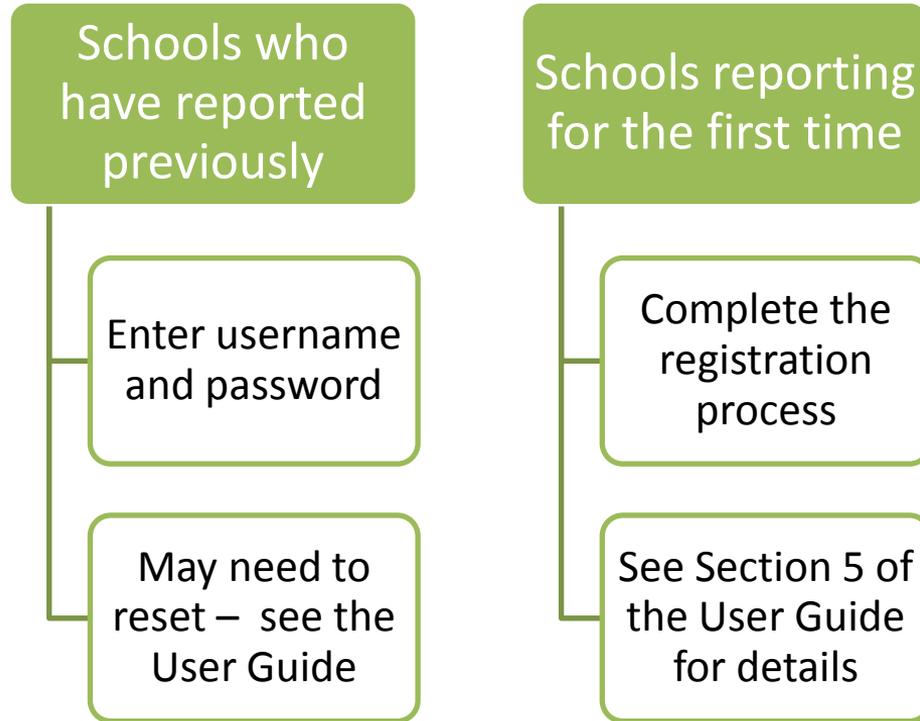
Data Collection Instrument

- <http://ExperimentalSites.ed.gov>
- Click “Data Collection Instrument” in the ESI Reporting box
- Select the “2014-15 Data Collection Instrument

User Guide

- <http://ExperimentalSites.ed.gov>
- Click “Data Collection Instrument” in the ESI Reporting box
- Select the “2014-15 ESI User Guide”

Data Reporting Instructions



Technical Details

- Browser Requirements
 - Explorer 9.0 or higher, recommended
 - Must support Java script
- Types of authorized users
 - School Coordinator
 - School Users

Using the Experimental Sites Data Collection Instrument

- Log into the Experimental Sites Data Collection Instrument
- Click on Start/Continue Survey
- View the status of your submission
- To review data you entered previously please contact the Experimental Sites Team (202-377-4380 or ExperimentalSites@ed.gov)
- Enter applicable worksheet data
- Submit completed report

WARNINGS!!!

- The Experimental Sites data collection instrument will “timeout” your session if there has been no activity for 10 minutes
- Once your report is submitted, you will NOT be able to make any additional changes, or edit the report or the worksheets (without manual intervention by the Department)

Reporting Details

- Vary by Experiment
- See the appendix of the User Guide for complete details

Overview of Reporting Details

- All Direct Loan Experiments
- **Question #1:** Please provide a narrative description of your school's experiences implementing the experiment. Did *the experiment* benefit or harm any students? If so, how? Did *the experiment* cost or save the taxpayer money? If so how?

Overview of Reporting Details

- Both of the Direct Loan Experiments involving Study Abroad Students
- First 11 items of **Question #2**:
- Request counts of students defined by various characteristics: participation in a study abroad programs; graduate status; undergraduate status; Pell Grant eligibility; and borrowing additional funds through the Direct Loan program.

Overview of Reporting Details

- Direct Loan Experiment allowing single disbursement to Study Abroad Students
- The remaining items of **Question #2** request further information concerning: sum of new borrowing through the Direct Loan program; counts of Direct Loan borrowers dropping out prior to the midpoint of the term; and counts of various student groups completing the term.

Overview of Reporting Details

- Direct Loan Experiment allowing early disbursement to Study Abroad Students
- The remaining items of **Question #2** request further information concerning: sums of new Direct Loan borrowing; counts of borrowers receiving their initial Direct Loan disbursement early; and counts of students completing their study abroad term.

Overview of Reporting Details

- Direct Loan Experiments involving reducing eligibility or allowing unequal disbursements of unsubsidized Direct Loans
- **Question #2** requests the number of groups
- **Question #3** requests a description of each group
- Further reporting requested by **Questions #4 and #5** is to be done for each response to **Question #3**

Overview of Reporting Details

- Direct Loan Experiments involving reducing eligibility or allowing unequal disbursements of unsubsidized Direct Loans
- **Question #4:**
- Templates for both experiments request
 - Tuition and Total Cost information
 - Distribution of applicable student group across EFC ranges
- Template for unequal disbursements requests
 - # of loan periods
 - % disbursed in highest period
- Template for reduced eligibility requests
 - Average reduction in loan eligibility

Overview of Reporting Details

- Direct Loan Experiments involving reducing eligibility or allowing unequal disbursements of unsubsidized Direct Loans
- **Question #5:**
- Template for both experiments request
 - By Group and Year in School
 - # of students receiving various types of funding
 - Sum of \$'s disbursed of a particular funding source
 - # of students experiencing various post secondary outcomes (e.g., completion, progression, leaving without finishing, etc.)

Action Plan

Action Plans

- <http://ExperimentalSites.ed.gov>
- Click “Action Plans” in the Implement an Experiment box
- Select the experiment(s) you are participating in

For the Experiments Ending 2015-2016 Award Year

- **Student Abroad**
 - Single Disbursement
 - Early Disbursement
- **Loan Amounts**
 - Unequal Disbursement

Experimental Sites Update



Direct Loan Program—Single disbursement of a one-term loan for study abroad students

Project Lead: _____

Exemptions:

[HEA Section 428G\(a\)](#) which generally requires multiple disbursements of student loans.

[34 CFR 685.301\(b\)\(3\)\(ii\)](#) which requires at least two disbursements of Direct Loan Program loan proceeds.

Through award year 2015-2016, the exemptions allow a single disbursement of a one-term loan for some study abroad students attending participating institutions even if the institution's cohort default rate equals or exceeds five percent.

Action Plan for 2016-2017 and beyond: The institution must transition back to the required law and regulations below:

Regulations/law: [HEA Section 428G\(a\)](#) and [34 CFR 685.301\(b\)\(3\)\(ii\)](#)

To assist you with your action plan, we have provided guidance on areas that you may want to consider during the transition process.

Action	Timetable
Policies and Procedures	
<ul style="list-style-type: none"> ❑ Locate affected policies and procedures ❑ Update policies and procedures to reflect current requirements 	
Systems	
<ul style="list-style-type: none"> ❑ Identify affected system changes, as applicable 	
Consumer Information	
<ul style="list-style-type: none"> ❑ Identify all Consumer Information documents and web pages that require updates ❑ Schedule Changes 	
Reporting	
<ul style="list-style-type: none"> ❑ Prepare for reporting requirements. Reporting requirements remain in effect for the Fall 2015 reporting period. For the Fall 2016 reporting period FSA will administer a Customer Satisfaction Survey that participating schools will be required to complete to satisfy the reporting requirement 	
Impact on other Offices	
<p>Financial Aid Office: Train staff on the current law and how it impacts the aid office</p> <p>Publication Office: Provide information that requires updates and include web pages</p> <p>Computer Systems: Notify institutional information technology department if any changes need to be made to systems</p> <p>Other Offices: Notify other offices and make changes as appropriate</p>	

Helpful resources when revising policies and procedures:

[A Guide to Creating A Policies & Procedures Manual, Section 8, Direct Loans](#)

Contact information

- The “Contact Us” page on the ESI website
- ExperimentalSites@ed.gov
- Warren Farr at 202-377-4380

QUESTIONS?

