



SFA Portal Strategy

Steve Hawald

Chief Information Officer

Student Financial Assistance

U.S. Department of Education

“We Help Put America Through School”

CBA/NCHELP Joint Conference

December 4, 2001

SFA Websites and Portals



Students.gov

November 16, 2001

[Email this page to a friend...](#)



students.gov

student gateway to the U.S. government
delivering government information and services
across your campus & around the world

Search for:

Within: **students.gov links database**

Select a **Hot Link** for *Fast Answers!*

Apply for Financial Aid

AMERICA RESPONDS

U.S. Government information and resources
in response to September 11 events

STUDENT LOAN RELIEF

For Terrorist Attack Victims
For Military Personnel Called to Active Duty

[privacy](#) · [link to us](#) · [add a link](#) · [disclaimer](#) · [about us](#) ·
[FAQs](#) · [contact us](#)

quick connections:

Need to apply for financial aid, file your taxes, or get a job? Connect now to some useful and popular government services by selecting from these featured links.

Pick a Quick Connection...

one-stop info spots:

Health, consumers, nutrition, business women, seniors—the U.S. Government has a variety of one-stop info spots for citizens. Choose what's important to you from this list of federal portals.

Pick a One-Stop Info Spot...



plan your education...

It's never too early... or too late... to begin planning education after high school. Here are some valuable links to help you get started.

[Prepare for college](#); [College](#); [Graduate school/young professionals](#); [Vocational](#); [International students](#); [Study abroad](#); [Parents guide](#); [Distance education](#); [School websites](#)

career development...

Whether you're beginning a new career or looking for a better job, the links in this section will help you get organized and find the information you need.

[Internships](#); [Fellowships](#); [Student job programs](#); [Explore careers](#); [Job search](#)

military service...

Discover the possibilities -- not only for military educational benefits, but for a dedicated life of service through great job opportunities.

pay for your education...

Here you will find general information about the major federal student aid programs (who is eligible and how to apply), tax credits for education expenses, and other federal, state, and private sources of information.

[Scholarships and grants](#); [Student loans](#); [State financial aid](#); [Work-study](#); [Military funding](#); [Budget your money](#); [Calculate costs](#)

community service...

Looking for ways to give back to your community? You can make a difference. Search for all types of volunteer and service opportunities with the links in this section.

[Environment](#); [Health care](#); [Education](#); [Poverty](#); [Children](#); [Be an international volunteer](#)

government 101...

For research, reference, and general information, here you will find a wide range of resources. From the White House to the Library of Congress to the Supreme Court -- you may be surprised at what's available here.





FAFSA On the Web

Student Financial Assistance
Office of the Chief Information Officer

Welcome to the U.S. Department of Education
Complete your Free Application for Federal Student Aid (FAFSASM) online

WELCOME | GETTING STARTED | ENTERING A FAFSA | CHECK MY SUBMITTED FAFSA | FEDERAL SCHOOL CODE SEARCH | PRIVACY ACT & SECURITY INFO | FREQUENTLY ASKED QUESTIONS | HELP

OPEN A SAVED APPLICATION | CUSTOMER SERVICE | CUSTOMER FEEDBACK | SITE AVAILABILITY | DEADLINES | AWARDS

[FAFSA en Español](#)

[Info on Aid Programs](#)

[Accessible](#)

[Enter a FAFSA on the Web](#)

[Security](#)

[Register with Selective Service](#)

[IRS Home Page](#)

VeriSign Secure Site
Click to verify



Schools portal

Student Financial Assistance
Office of the Chief Information Officer



Schools Channel

U.S. Department of Education
Student Financial Assistance

Friday, November 16

"We Help Put America Through School"

[Home](#)

[Portal Help](#)

[FAQs](#)

[Contacts](#)

[Got a Question?](#)

[Portal Feedback](#)

[Calendar Item](#)

Optimized for 4.X Browsers and Above - [Download Here](#)

SFA Links*

Reference Library

- [Advisory Committee on SFA](#)
- [Campus Security](#)
- [ED Home Page](#)
- [IFAP Home Page](#)
- [National Assoc. of SFAA](#)
- [Regional Assoc. of SFAA](#)
- [SFA Guidance: Terrorist Attacks](#)
- [SFA Home Page](#)
- [SFA Publications By Title \(IFAP\)](#)
- [SFA Publications By Topic \(IFAP\)](#)
- [State Assoc. of SFAA](#)

Student Data

- [DL Consolidation-School Services](#)
- [Direct Loan Entrance Counseling](#)
- [Direct Loan Home Page](#)
- [Direct Loan: Loan Origination](#)
- [Direct Loan Servicing On-line](#)
- [FAA Access on the Web](#)
- [NSLDS for FAAs](#)
- [Pell/RFMS](#)
- [SFA PIN Registration](#)

Book Store

- [SFA Publications and How to Order](#)
- [SFA Technical Support](#)
- [Student Aid Internet Gateway](#)

Participation & Funding

- [App for Approval to Participate](#)
- [FISAP on the Web](#)
- [GAPS & E-payments](#)

SFA Headlines

[More Headlines](#)

SFA Policy and Rule Changes

- [Recent Terrorist Attacks-Relief for Borrowers](#)
- [Recent Terrorist Attacks-Reporting Deadlines](#)

SFA News

- [Read All About the Upcoming "SFA to the Internet" Project](#)

SFA Search Tool

SFA Links & IFAP Database



[Advanced Search](#)

[About this Search](#)

My SFA- Sign Up Now!

USERNAME:

[Privacy Statement](#)

PASSWORD:



[CUSTOMIZE YOUR LINKS!](#)

SFA Calendar

Events

Deadlines

Training

NPRMs

< **November 2001** >

Su	Mo	Tu	We	Th	Fr	Sa
28	29	30	31	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	1

Friday, November 16

- [Massachusetts Fall Conference](#)

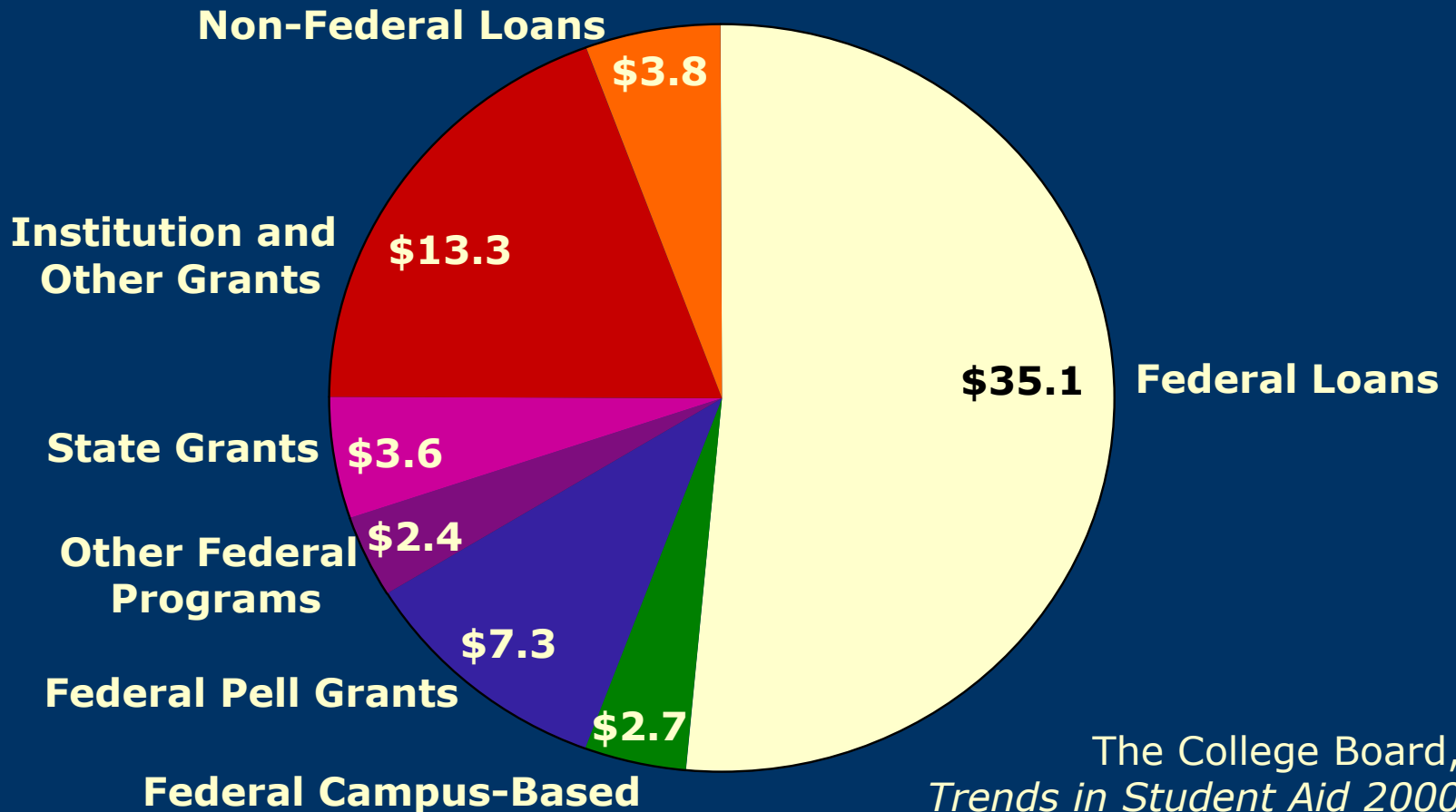
The SFA Context



Postsecondary financial aid

TOTAL AID AWARDED 1999-2000

\$68.4 Billion



The College Board,
Trends in Student Aid 2000



Performance objectives

- “Raise Our Customer Satisfaction Index From a Level Typical of Government to the Range Enjoyed by America’s Best Financial Service Companies.”
- “Reduce Our Unit Cost — the Amount We Spend Administering Per Recipient — by One-fifth”
- “[Raise] Our Employee Satisfaction Rating...From Mediocre to the Level of NASA Workers Who Reach for the Stars.”

Greg Woods, Interim Performance Objectives

Nov 15, 1999



Customer satisfaction

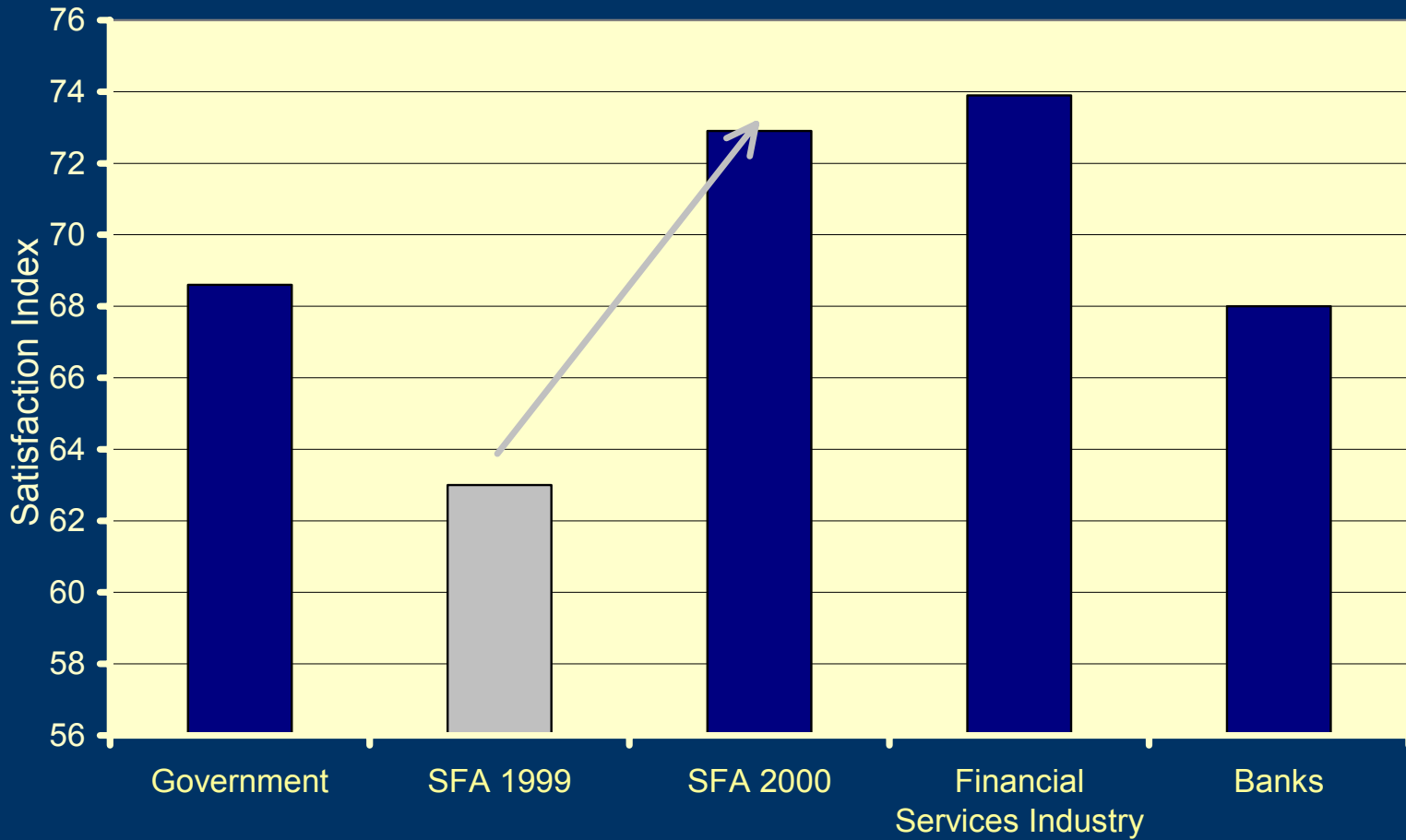
	1999	2000	
Federal Government	68.6	68.6	0
Student Financial Assistance	63	73	+10
Patent & Trademark Office	57	59	+2
Internal Revenue Service (e-filers only)	74	75	+1
Federal Emergency Management Agency	73	73	0
U.S. Mint	86	84	-2

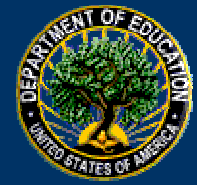
*American Customer Satisfaction Index
University of Michigan Business School*



Customer satisfaction

American Customer Satisfaction Index
University of Michigan





“Most satisfied” customers

Transaction Type	1999	2000
Electronic	74	75
Paper	NM	48
All	51	NM

*Internal Revenue Service, by type of filer
NM – Not Measured*



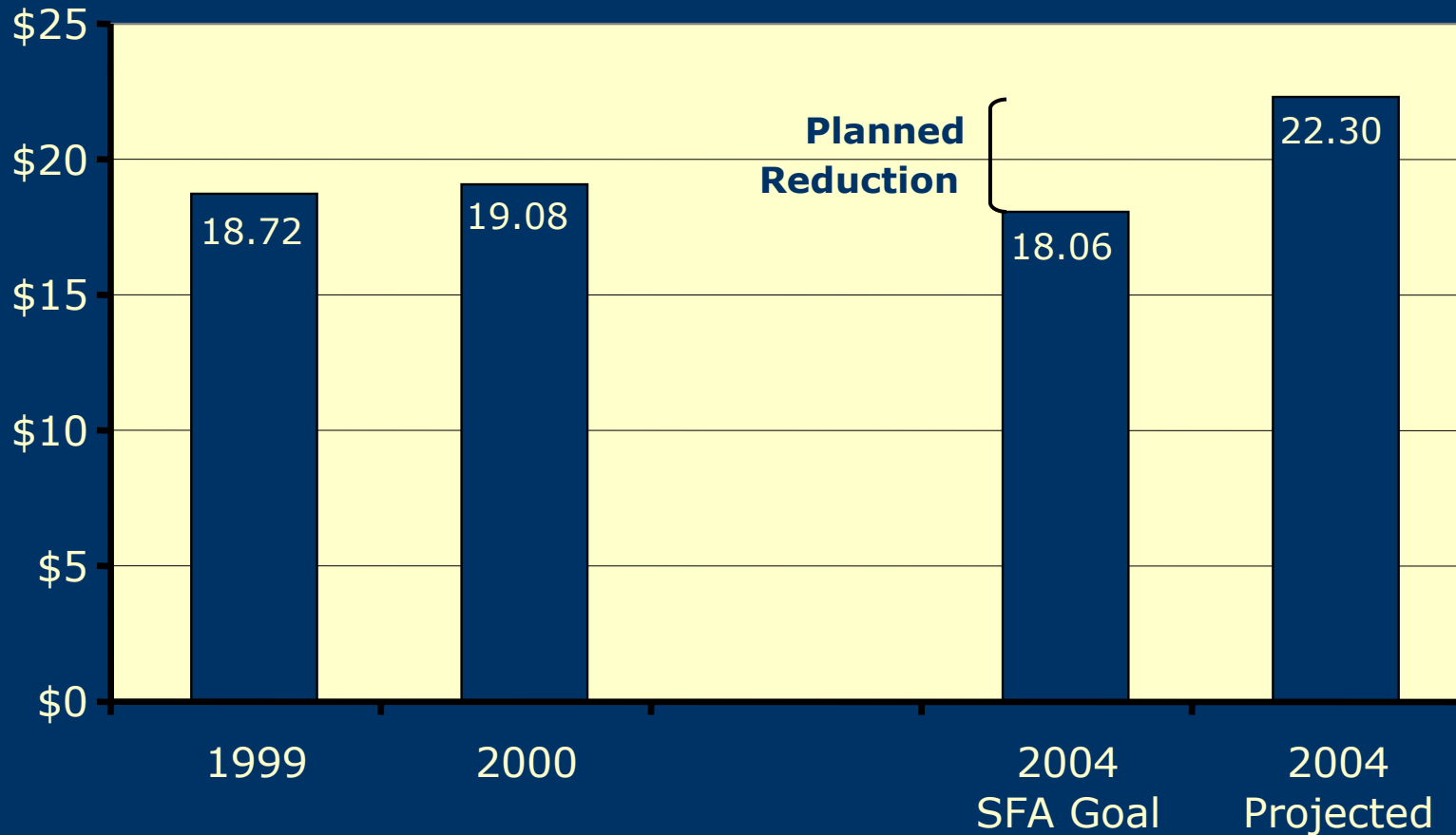
Observation

On-line customers today using electronic services are more satisfied than those that don't.



Reducing unit costs

Annual Cost per Recipient



SFA FY2001 Performance Plan

Each dollar reduction represents \$14 million annual savings

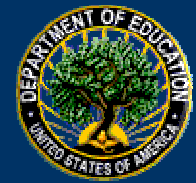
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Financial aid delivery: Large, complex

- A Very Complex Distributed System... Is Implied [for SFA].
- The Postsecondary Education Community Comprises Approximately 6,500 Lenders, 7,500 Schools, and Over 14 Million Students, As Well As State and Federal Government Organizations, Servicers, Guaranty Agencies, Secondary Markets, Professional Organizations, Commercial Software Development Companies Specializing in Software to Support Postsecondary Institutions, Etc.

Project EASI, Concept Document, June 23, 1997



FY 2002 PBO Victory Initiatives

- Turbo FAFSA
- Common Origination & Disbursement
- Financial Management System with E-Business Center
- NSLDS Mad Dog Changes
- Portal with Single Logon
- E-Sign & P-Note
- Consistent Answers for Customers (Contact Centers, CRM, Customer Data)
- Human Resources Support Systems
- Product Support Analysis (FAFSA, DL Participation, DL e-Servicing)

The Role of Portals



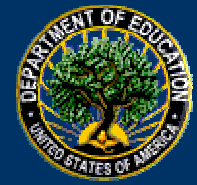
The busin\$\$\$ strategy

Portals offer convenience

Convenience increases use

Use

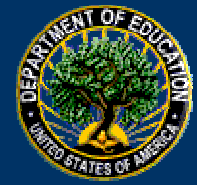
- increases customer satisfaction
- decreases unit costs



SFA Objectives

- Increase customer satisfaction
 - Decrease unit costs
 - Increase employee satisfaction
-

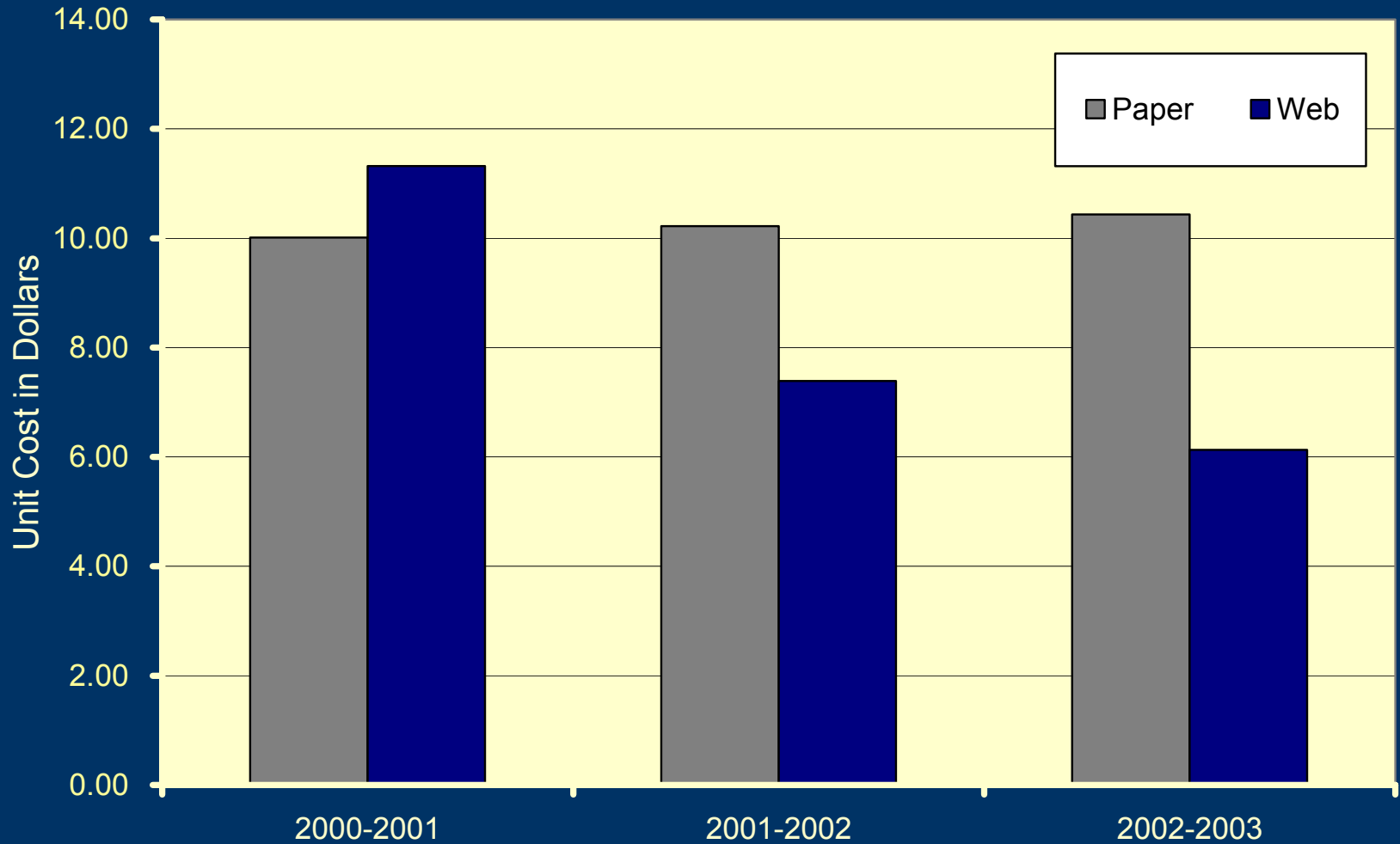
Portals are tools for meeting these objectives



Unit costs

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Cost of FAFSA Processing

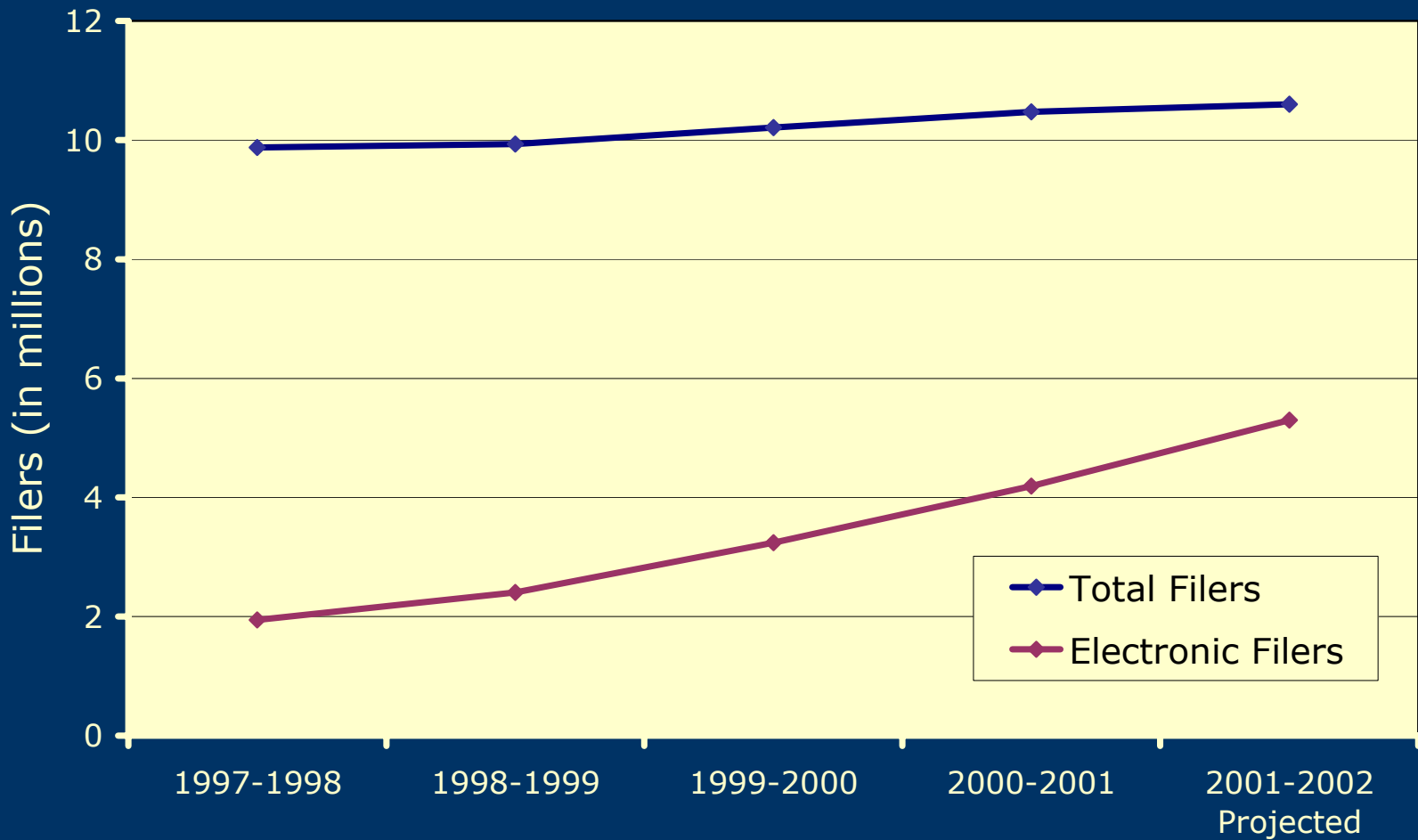




FAFSA On The Web

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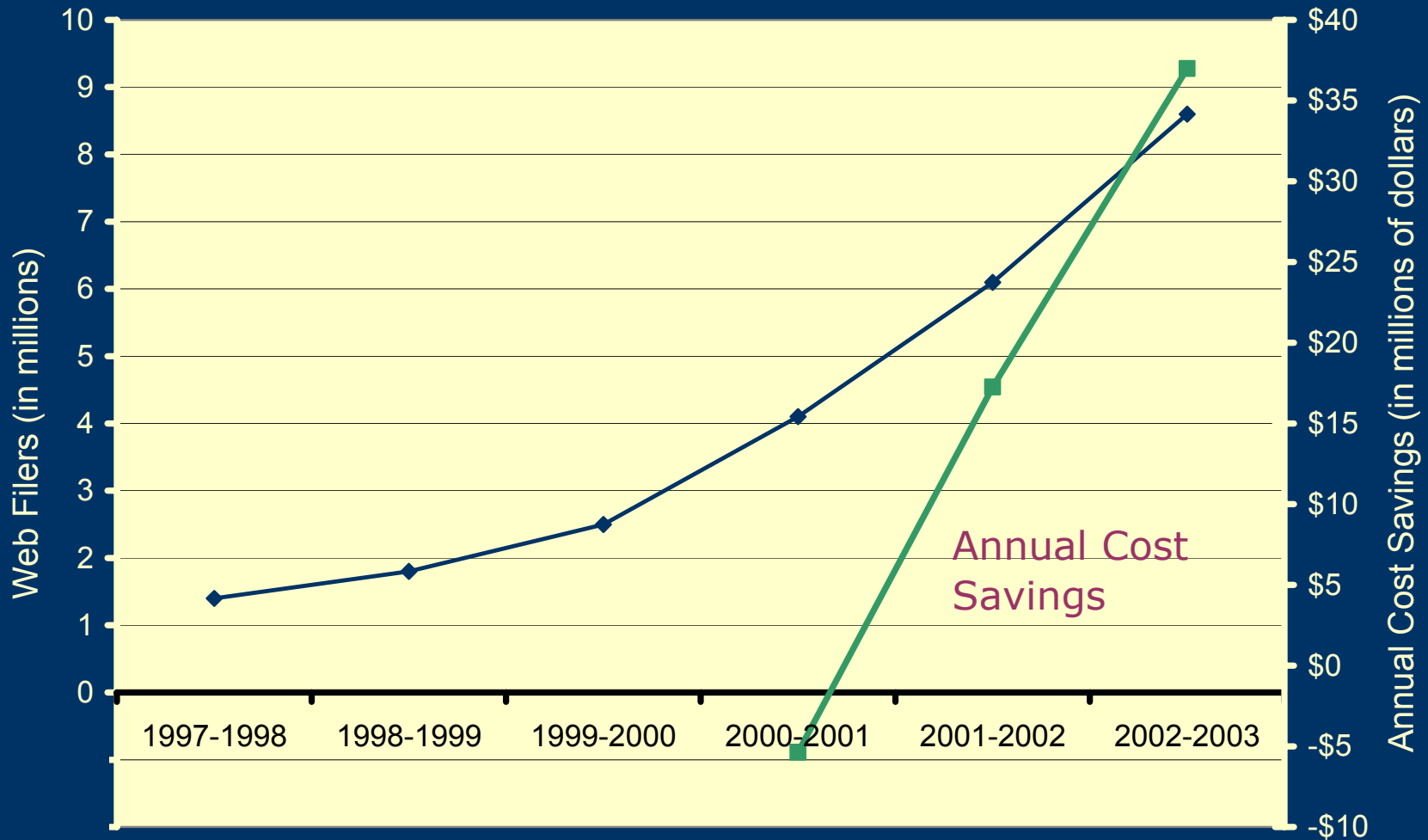
FAFSA Filers for Federal Financial Aid





Cost savings

FAFSA On the Web



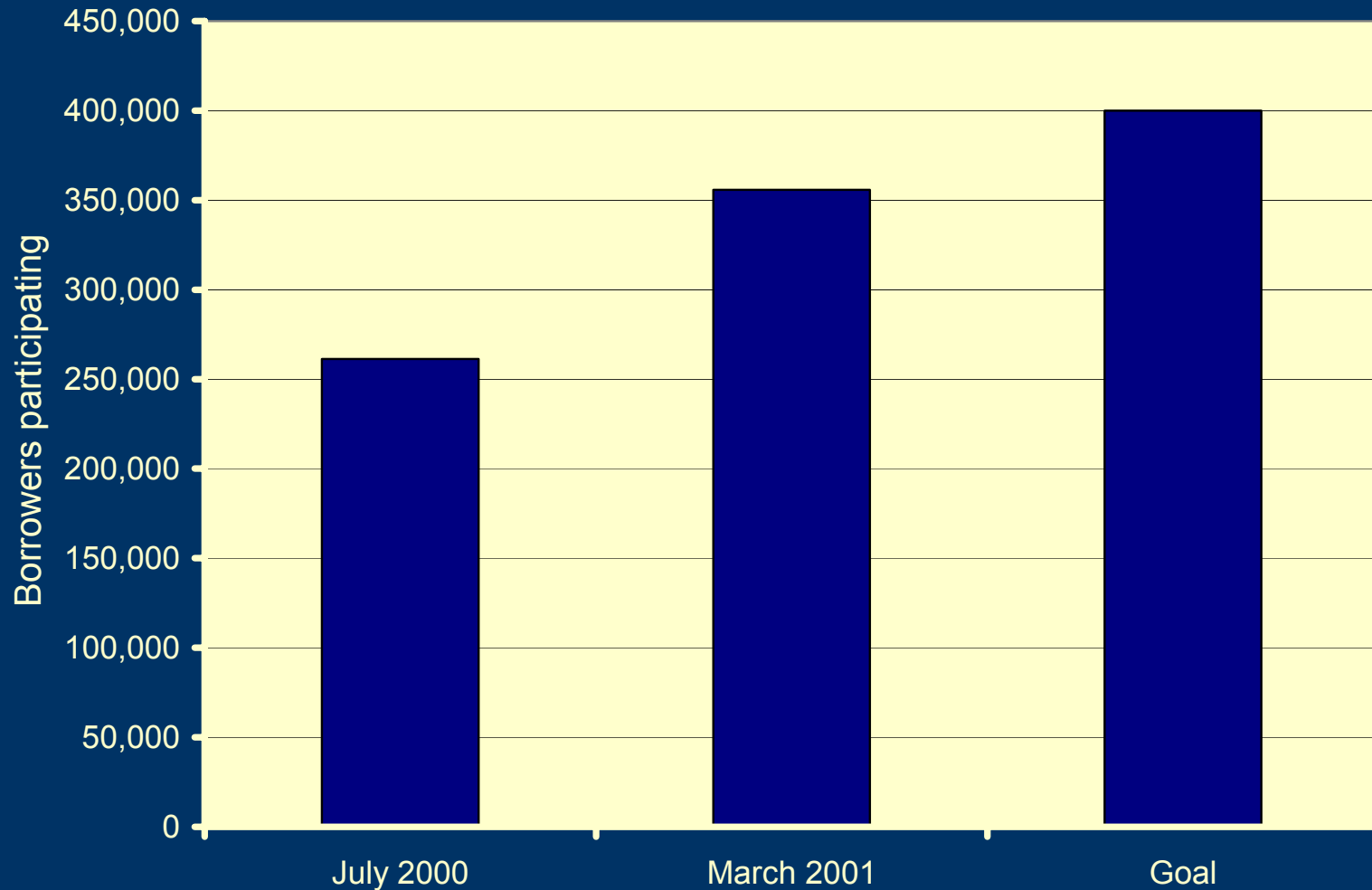
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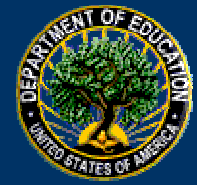


E-commerce initiative

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Electronic Debiting
Federal Direct Loan Program



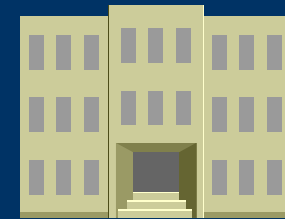


Value of Web applications

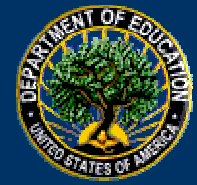
\$23 million (President's Budget)
Operating Costs \longrightarrow Investment



Electronic Access



SFA



Portals offer

- Single signon
- Personalization
 - Selection of content
 - Organization of display
 - Preferred style
- Support of multiple devices

➔ Implementing a portal will increase the number of those using electronic services



Web-Enabled Applications

- FAFSA on the Web
- Schools Portal Release 2.0 with Single Sign-On
- Financial Partners Portals – FY 2002
- Student On-line Access to Direct Loan Servicing
- API to SFA Systems



SFA Portal Strategy

- Phase 1- Created an Enterprise Portal Vision
 - completed March 2001
- Phase 2 - Develop an enterprise repository of reusable portal components using the existing Schools Portal
 - completed November 2001
 - Utilizes Java J2EE standards and an Open Source Framework

Software Developers Conference, November 8, 2001



Benefits of the Portal Strategy

- Creates a Lightweight Portal Framework that
 - reduces custom coding and development complexity and ensures that portlets can be reused on multiple portal pages.
 - supports WAP and other wireless technologies for future initiatives
- SFA portal standards are available to the community
- Community has the opportunity to integrate with SFA systems.

Software Developers Conference, November 8, 2001



SFA Enterprise Portal to...

- Be a phased development of students and financial partners portals
- Consolidate, integrate and eliminate multiple Websites
- Provide common look and feel across all SFA e-Commerce products
- Enhance the existing Schools Portal
 - Single signon
 - "New" architecture
 - Common look & feel

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Technology Choices

Announced February 2000

- XML - B2B Standard
 - Business Messages
 - XML Schema
- Java - Transportable Programs
 - Shared Java Components
 - Web Implementations – FAFSA
- UML - Unified Modeling Language



Integrated services



Portal

Customer
Interaction
Center

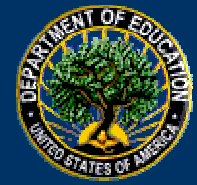


Real-time
Data Mart



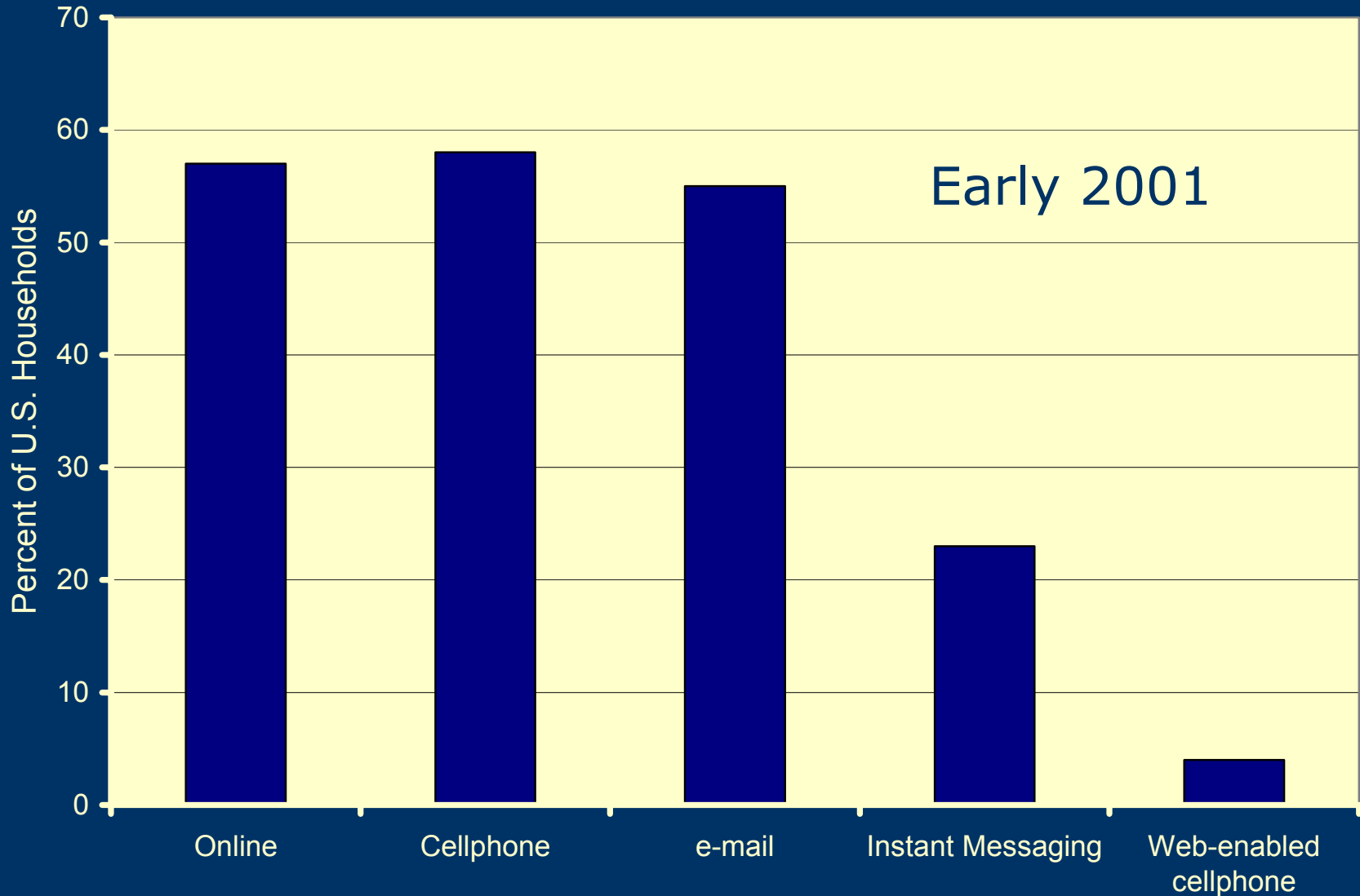
Customer Interaction Center

- Consolidating Call Centers
- CRM Standards – Siebel Systems
- Providing On-line Access to All SFA Systems
- Providing Knowledge Tools to Customer Service Representatives
- Supporting Customer Self-service Via IVR, E-mail, Web-access
- Improving the Quality of All Services



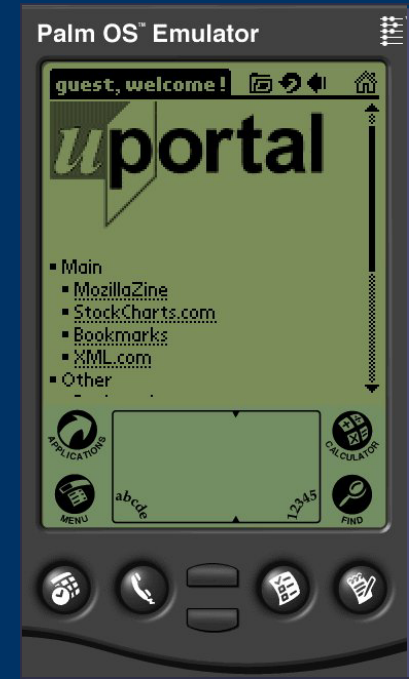
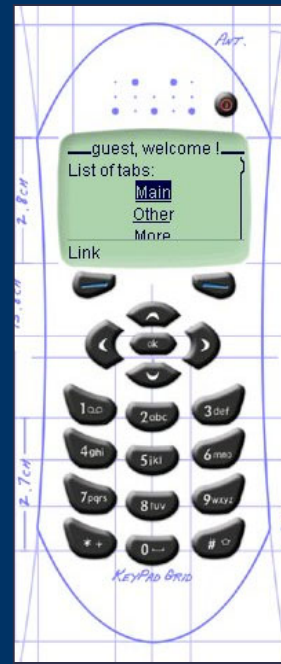
The communicating household

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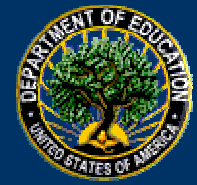




Multiple target devices



Example from JA-SIG uPortal 2.0



A possible future

- SFA supports “real” wireless applications
- SFA portlets become available for use on college and university portals
- Real-time integration with school business systems - the “Florida State University” model

All increase direct access to SFA on-line services



The future

- 18 SFA Web sites
 - become
- 4 SFA Portals
 - with experience and integration could become
- Single SFA Portal with extensive personalization



The “portal initiative”

- Satisfied “customers”
- increasing their use of SFA portals and portlets
- achieving objectives

Everybody benefits!

? ? ? ? ?
? ? ? ? ?
? Questions and Answers ?

? ?

Thank you
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stephen_hawald@ed.gov

Supplementary Slides



Portal defined

- generally synonymous with a gateway, for a World Wide Web site that is or proposes to be a major starting site for users when they get connected to the Web

www.whatis.com, May 19, 2001

- “A portal’s main reason for existence is to integrate disparate systems and data into a unified, centrally accessible interface.”

Jim Paroza, “Enterprise value of portals is clear,”
eWeek, Sep 13, 2002



Types of portals

- Enterprise [integration]
- Knowledge/document management
- Collaboration and messaging
- Front end to application servers

Jim Rapoza, "Enterprise value of portals is clear,"
eWeek, September 13, 2001



Yahoo, "THE Portal"

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The screenshot shows the Yahoo! homepage with the following elements:

- Navigation Links:** Calendar, Messenger, Check Email, What's New, Personalize, Help.
- Advertisements:** netsijet.com (claim it before it's gone), "Enter to win The Ultimate Outdoors Trip" (click here), "Make Yahoo! your home page".
- Search:** A search bar with a "Search" button and a link to "advanced search".
- Travel:** "Yahoo! Travel" with links for Air, Car, Hotel, Vacation, and Cruises.
- Shop:** Auctions, Classifieds, PayDirect, Shopping, Travel, Yellow Pgs, Maps, Media, Finance/Quotes, News, Sports, Weather.
- Connect:** Careers, Chat, Clubs, Experts, GeoCities, Greetings, Mail, Members, Messenger, Mobile, Personals, People Search.
- Personal:** Addr Book, Briefcase, Calendar, My Yahoo!, Photos, Fun, Games, Kids, Movies, Music, Radio, TV, more...
- Yahoo! Auctions:** A section titled "Bid, buy, or sell anything!" with sub-sections for Categories (Antiques, Cameras, Coins, Comic Books, Computers, Electronics, Sports Cards, Stamps) and Items (Ichiro Suzuki, Tiger Woods, PlayStation 2, MP3 Players, Dawson's Creek, Morgan Dollars, Longaberger, Palm Pilots). It also lists "Baseball Cards - McGwire, A-Rod, Jeter, Bonds, Sosa, Griffey Jr., Ichiro".
- In the News:** A list of news items including "Israel PM defiant over Palestinian strikes", "Democrat ad campaign targets Bush energy plan", "The Son's Room' wins at Cannes", "Shrek' tops weekend box office", and "Playoffs: NBA, NHL | MLB more...".
- Marketplace:** A section for shopping with links to computers, videos, CDs, toys, electronics, and more. It also includes "Y! Bill Pay - get organized, pay bills online" and "Looking for a car? job?".
- Other Sections:** Arts & Humanities (Literature, Photography...), News & Media (Full Coverage, Newspapers, TV...), Business & Economy (B2B, Finance, Shopping, Jobs...), Recreation & Sports (Sports, Travel, Autos, Outdoors...), Computers & Internet (Internet, WWW, Software, Games...), and Reference (Libraries, Dictionaries, Quotations...).



MyYahoo, a personal portal

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My YAHOO! Welcome, Michaela and Justin! - [Yahoo!](#) - [Update](#) - [Account Info](#) - [Help](#) - [Sign Out](#) 12,000 registered use Oracle's free CRM Software. [See why.](#)

See what's hot with [Buzz module on My Yahoo!](#)

"I own my own domain. Am I not the coolest?"
(ok, don't answer that)
YAHOO! Domains www.

[[move to bottom](#)] [Advanced](#)

© 1976, 2000 SANRIO CO., LTD © 1976, 2000 SANRIO CO., LTD

Justin & Michaela [Add Page](#) - [Options](#)

Personalize [Content](#) [Layout](#)

Calendar [Edit](#) [X](#)

◀ May 2001 ▶

Su	Mo	Tu	We	Th	Fr	Sa
29	30	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2

Today is **May 20, 2001**

Today [Add Event](#)
No events scheduled.

Monday [Add Event](#)
No events scheduled.

Tuesday [Add Event](#)

Horoscopes [Edit](#) [X](#)

Aries

Horoscope (by astrocenter.com)
Today you get a little break from reality. The Moon-Jupiter sextile suggests you to dream, actually to dream big! Think about what it is that you want most out of life. Aim your arrow at the stars and pull back your bow as far as possible. There is no limit to how far you can go. Your only limitation is your own imagination. Don't worry if your plan doesn't seem to make any rational sense. Worry more about what you want and less about how you are going to get it.

Cancer

Horoscope (by astrocenter.com)
This is an excellent day for you, in which you will find a great deal of strength in your emotions. Trust that your instincts are serving you well, better than any other sign in

Message Center [Edit](#) [X](#)

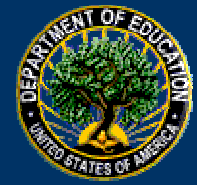
[Check Email](#)
[Check Calendar](#)

Maps [Edit](#) [X](#)

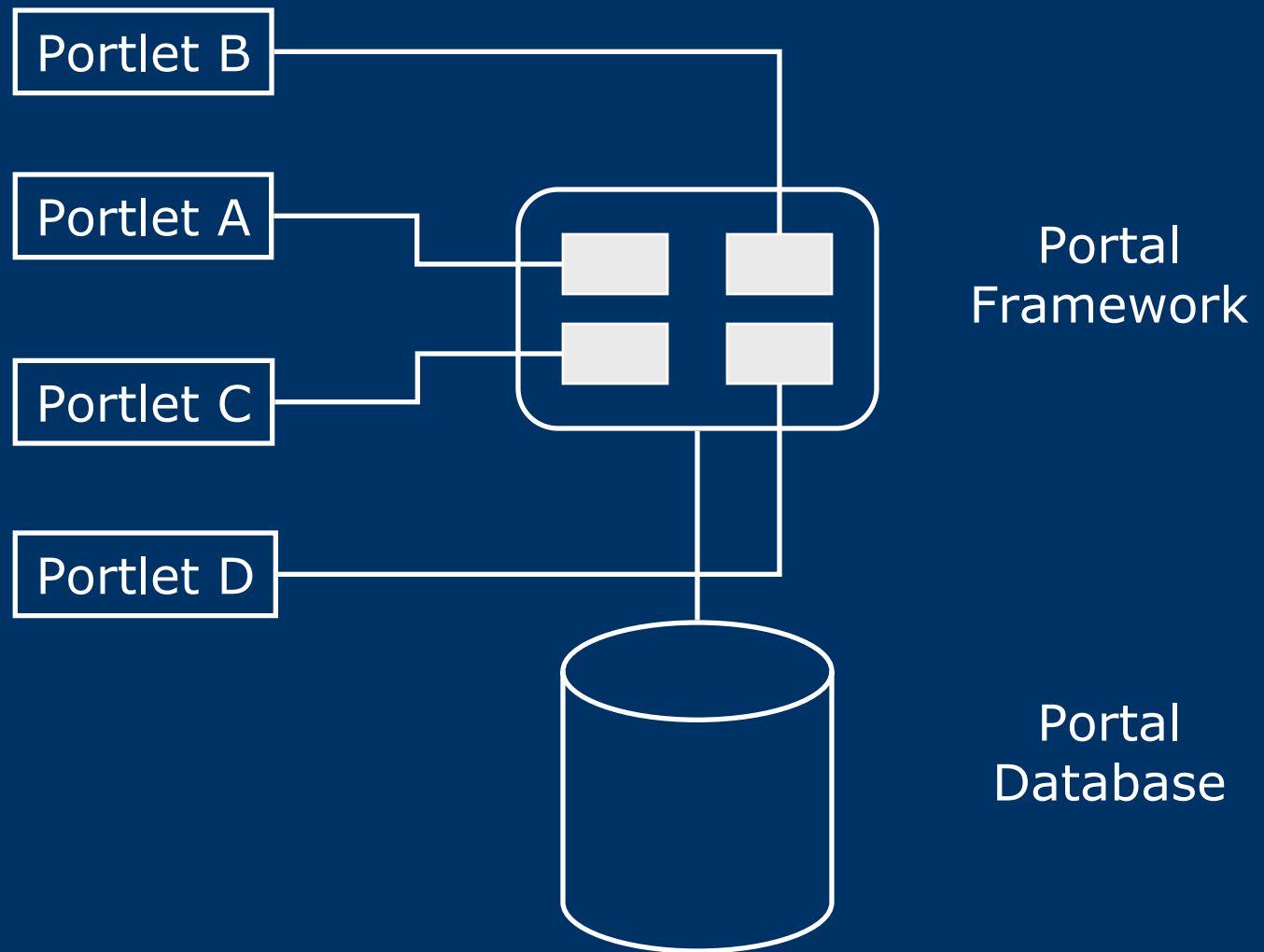
Select from Recently Used
([clear recent](#))
— Recently Used — ▾

Or Map a New Address:
Street Address or [Airport Code](#)

City, State or a Postal Code



Portal integration



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Portlet defined

[A portal] bridges the largely disconnected worlds of dynamic data, documents, and Web sites using re-usable information components called *portlets*. A portlet is a live area of HTML or XML/XSL which represents an information source in a standardized, consistent, and secure manner. Portlets summarize, promote, or provide basic access to an information source for a group of users who find business value in the information. [underline added]

Feature overview, Oracle 9iAS Portal,
www.oracle.com/collateral/portal_fov.html/, November 17, 2001



Other component names

<u>Company</u>	<u>Name</u>
Apache, IBM (Jetspeed)	Portlets
JA-SIG uPortal	Channels
Epicentric	Modules
BEA Systems	Portlets
Plumtree	Gadgets
iPlanet	Channels
Citrix	Portlets
Oracle	Portlets



FAFSA On The Web

FAFSA e-Filers

