



**FSA Experimental Sites Initiative
Online Annual Reporting Tool User Guide
Version 3.0 (September 20, 2004)**

The U.S. Department of Education, Federal Student Aid introduced the online annual reporting tool for the Experimental Sites Initiative in December 2003. All participating schools are required to use the online tool to complete and submit their annual reports. This guide will discuss the reporting requirements, and how to use the online reporting tool to report current academic year data and to access prior year reports. The following is a brief Table of Contents:

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1.0 Reporting Period

Participants will use the online reporting tool to complete and submit their annual reports. Your annual report must be submitted by November 15.

2.0 Authorized Users

Each participating school can designate up to three individuals to access and use the online tool. Each user will have the same access rights, with the ability to edit, save, and submit the school’s annual report. Only the School Experimental Sites Coordinator can designate/add, or remove authorized users.

2.1 Designating/Adding a User

To designate or add a user, your school's Experimental Sites Coordinator or other designated user must complete the Request for New User Access form (see Appendix A for a copy of the form). The Experimental Sites Coordinator and user will sign the form and fax it to the Experimental Sites team at 202-275-4537 (Attention: Experimental Sites User Access).

The user will then be registered and issued a temporary password (a confirmation email message will also be sent to your school's Experimental Sites Coordinator). When the user first logs onto the Experimental Sites online reporting tool, s/he will be prompted to change the temporary password.

2.2 Removing Users

To remove a user, your school's Experimental Site Coordinator must complete the Request to Remove User Access form (see Appendix B for a copy of the form). The Experimental Sites Coordinator will sign the form and fax it to the Experimental Sites team at 202-275-4537 (Attention: Experimental Sites User Access).

Once the user has been removed from the authorized users database, a confirmation email message will be sent to your school's Experimental Sites Coordinator only.

3.0 Accessing the Experimental Sites Annual Reporting Tool

To access and use the online reporting form, you must have a web browser (e.g., Internet Explorer 5.0 or higher). You can access the Experimental Sites online reporting tool from the Experimental Sites home page at <http://www.ed.gov/offices/OSFAP/expsites>. The "Annual Reporting Tool" link is located under "For Participants" in the tool bar on the left hand side.

4.0 Logging In

To prevent unauthorized access to the reporting tool, the log in screen will ask you to enter your *User ID* and *Password*. Once you enter your User ID and password, click "Log In". The system will verify that you are a registered user and that you are authorized to access your school's report. During your first log in attempt, you will be asked to change your temporary password.

After you enter your User ID and password, you will be presented with a Warning Screen indicating that you are accessing and using a United States Government computer network. To access the online reporting tool, click "I Agree". If you click "I Disagree" you will be returned to the Experimental Sites home page.

4.1 Password Lock-Out

As a system security feature, the online reporting tool log in screen will allow only five consecutive, failed log in attempts before the system automatically locks-out your password. You will then have to contact Warren Farr at 202-377-4380 or ExperimentalSites@ed.gov to get a new

temporary password. The password will be emailed to you (with a cc: to your school's Experimental Sites Coordinator).

4.2 *Forgot Your User ID or Password*

If you do not remember your User ID or password, contact Warren Farr at 202-377-4380 or ExperimentalSites@ed.gov. If you forgot your User ID, you will be provided with your User ID via email or phone. If you forgot your password, a new temporary password will be emailed to you (with a cc: to your school's Experimental Sites Coordinator).

4.3 *Changing Your Password*

You can change your password at any time. To change your password, click the "Let me change my password after login" button on the log in screen. You will be asked to provide your new password, and then re-enter your new password. Your password must contain: (1) a minimum of eight characters, a maximum of twenty, (2) three of the following: upper-case letters (A-Z), lower-case letters (a-z), numerals (0-9), and/or special characters (!,@,#,\$,&,*) and (3) no spaces. Your password must also be different from your last five passwords.

4.4 *Expiring Passwords*

User passwords will expire every 90 days. When your password expires, you will be prompted to provide a new password when you attempt to log in.

5.0 *Annual Report Home Page*

After logging in, the online reporting tool will take you to the Annual Report Home Page. The Home Page lists your school name, the academic year for which you are reporting, and some information on using the site. The Home Page's "Experimental Sites Worksheets Required" section lists the specific experiments in which your school is participating for the current year. This section can also be used to track your progress in completing your annual report. As each worksheet is completed, a checkmark will appear beside the experiment. Once you have completed all of the worksheets, you can then submit your final annual report (see Section 10.0 for additional details on submitting the report). In addition, the site contains a drop-down menu where you can access your prior academic year reports (see Section 12.0 for additional details on this feature).

6.0 *Accessing Worksheets*

It's important to complete the Demographics worksheet first since the system must check some of the other worksheet data against this form. After completing the Demographics worksheet, you may complete your remaining worksheets in any sequence you prefer. The "Go to Worksheet" box at the bottom of every page lets you "jump" directly to any worksheet. To access a worksheet, click on one of the experiments in the "Go To Worksheet" box's drop down menu and then click "Go". You can also access a worksheet by clicking on the worksheet's name in the "Experimental Sites Worksheets Required" section of the Annual Report Home Page.

7.0 Entering Worksheet Data

Once you open a worksheet page, your cursor will automatically appear in the first data entry field. You can go to a particular field by either using your mouse to click on a data field or by using the “Tab” key. You are not required to enter all of your worksheet data at one time. You can enter some data, save the worksheet, and then return to the worksheet at a later time (see Section 9.0 for additional details on saving a worksheet).

When completing the worksheets, there are several data elements that have specific range, sum, and/or cross-edit check requirements. The Data Dictionary lists each of these requirements where applicable. Please make sure to refer to the Data Dictionary as you are completing the worksheets (see Section 14.0 for additional details on accessing the Data Dictionary). Also, when you save your worksheet, the online reporting tool will automatically check your entered data to make sure it does not violate any range, sum, and/or cross-edit check requirements (e.g., number in field 1 cannot be greater than number in field 2). If there is an error, you will be returned to the worksheet and a red error message will be provided at the top of the worksheet. The error message will state ERROR and then provide a description of the error.

Lastly, almost all of the worksheets have comment boxes that must be completed before you can submit your report. When you open a worksheet, the system will automatically check to see if the worksheet’s comment boxes are completed. If a comment box is not completed, the system will display a red notification message stating “[not entered]” above the comment button. You can save your worksheet data without entering data in the comment box. However, you will not be able to submit your report until all required comment boxes are completed. Once you enter comments in a comment box, the notification message will disappear.

8.0 Timeouts

The Experimental Sites online reporting tool will “timeout” your session if there has been no activity for 30 minutes. Inactivity means that the server has not been accessed for 30 minutes (i.e., you may have been typing in a worksheet, but if you have not saved or opened a new worksheet during the 30 minutes, you will be timed-out). Please note that if you are timed-out, you will lose any changes that were made since you last saved. The reporting tool will display the log in screen with the message “Your session has timed out. For your security, we must ask you to log in again.” Simply log in by entering your User ID and password.

9.0 Saving Worksheet Data

The Experimental Sites online reporting tool gives you the freedom to enter, save, and edit your worksheets at your convenience. In other words, you do not have to complete all your data entry in a single session. To save a worksheet, click the “Save Data” button located near the bottom of the worksheet. The system will then check (1) the formats of some of the data elements (e.g., make sure there is no text in a number field) and (2) make sure the data elements do not violate any range, sum, and/or cross edit check requirements (e.g., number in field 1 cannot be greater than number in field 2). Some data elements in the experiment worksheets cannot be greater than

data entered into the Demographic worksheet. When you save the worksheet, the system will also check for any of these data entry errors. If there is an error, you will be returned to the worksheet and a red error message will be provided at the top of the worksheet. The error message will state ERROR and then provide a description of the error. If you attempt to go to a new worksheet without correcting the errors, the system will notify you that you will lose your entered data and ask you if you would like to continue.

If there are no formatting or cross edit check errors within the worksheet, you will be returned to the worksheet and a red message will be provided at the top of the worksheet stating “Your data has been saved”. You can then continue your data entry. You can also exit the reporting tool, return to the reporting tool Home Page by clicking the “Annual Report Home” button in the main tool bar, or use the “Go to Worksheet” navigation box to select a new experiment.

When you save your worksheet, the system will also check to see if all required fields have been completed (this includes any required text boxes). If so, a checkmark will be displayed next to the worksheet’s name on the reporting tool Home Page. This can serve as a useful reference for determining the status of your completed worksheets. IMPORTANT NOTE: If a check mark does not appear next to one of your worksheets, make sure you completed all required fields and text boxes. If a required text box has not been completed, the system will display a red notification message stating “[not entered]” above the comment button.

You can return to a saved worksheet at any time by selecting the worksheet in the “Go to Worksheet” navigation box and clicking “Go”. When the system opens the worksheet, it will automatically retrieve your saved data.

If you attempt to go to a new worksheet without saving your current worksheet, the system will prompt you to save the worksheet. IMPORTANT NOTE: If you close your web browser or click your web browser’s “Back” button without saving your current worksheet, you will lose any unsaved data.

10.0 Submitting Your Completed Report

Once you have completed all of your school’s worksheets, you can then submit your school’s annual report to the Department of Education. The reporting tool Home Page will also display checkmarks next to those worksheets that have been completed (i.e., all of the worksheets’ required fields have been completed). You can use the Home Page to verify that all of your worksheets are complete before submitting your annual report.

To submit your annual report, return to the reporting tool Home Page and click the “Submit Report” button. The reporting tool will verify that all required fields have been completed. If there are any incomplete fields, you will be provided with a dialog box stating that your report could not be submitted because a worksheet(s) was not complete. The dialog box will also refer you to the list of worksheets on the reporting tool Home Page. Those worksheets that do not have a checkmark after their name are not complete (i.e., have some missing data).

After verifying that all of your worksheets are completed, the reporting tool will also run a final check to make sure the data elements do not violate any range, sum, and/or cross edit check requirements (e.g., number in field 1 cannot be greater than number in field 2). If there are any remaining data entry errors, the tool will return you to the Home Page and a red error message will be provided at the top of the worksheet. The error message will state “ERROR: The following data entry errors have been identified and must be corrected before your report can be submitted.” The error message will also provide a list of the worksheets with the data entry errors so that they can be corrected.

Once the system verifies that all of your worksheets were completed and that there are no data entry errors, then your report will be submitted to the Department of Education. The reporting tool will provide you with an immediate confirmation that your report was submitted. You will be able to print this confirmation page for your records.

IMPORTANT NOTE: Once your report is submitted, you will NOT be able to make any additional changes, or edit the report or the worksheets. As a result, it is important that you make sure that all data elements are final before you submit your report. You will be able to print your annual report and individual worksheets after the report is submitted (see Section 11.0 for additional details on printing). If you determine that you need to make additional changes to your submitted report, contact Warren Farr at 202-377-4380 or ExperimentalSites@ed.gov. The Experimental Sites team will then unlock your submitted report, so that you can make any final changes.

11.0 Printing Your Worksheets and Annual Report

You can print your worksheets by experiment or your entire annual report at any time. To print an individual worksheet, open the worksheet by using the “Go To Worksheet” navigation box or by clicking on the worksheet’s name in the Annual Report Home Page and then click the “Printer Friendly Version” button. You will then be presented with a printer-friendly view of your worksheet. To print the worksheet, click “Print”. Once the worksheet is printed, click the “Return” button to return to the data entry form.

Once you submit your annual report, you will still be able to print an individual worksheet. When you open a worksheet using the “Go to Worksheet” navigation box or by clicking on the worksheet’s name in the Annual Report Home Page, you will be automatically taken to the printer-friendly view of the worksheet. To print the worksheet, click “Print”. Once the worksheet is printed, click the “Return” button to return to the reporting tool Home Page.

To print your entire annual report, go to the reporting tool Home Page and click the “Printer Friendly Version” button. You will then be presented with a printer-friendly view of all of your worksheets. To print the report, click “Print”. Once the report is printed, click the “Return” button to return to the Home Page.

12.0 Accessing Prior Academic Year Worksheets/Reports

From the Annual Report Home Page, you can access your prior year worksheets and report. Underneath your school's name, you will see a drop-down menu called "Reporting Year". To view your prior academic year data, select a particular year from the drop-down menu. The screen will then change to the academic year that you selected and will list your school's experiments for that year. Please note that you will only be able to view and print your prior year worksheets and report (this reminder will appear at the top of your screen).

To print an individual worksheet, open the worksheet by using the "Go To Worksheet" navigation box or by clicking on the worksheet's name in the Annual Report Home Page. You will be automatically taken to the printer-friendly view of the worksheet. To print the worksheet, click "Print". Once the worksheet is printed, click the "Return" button to return to the reporting tool Home Page.

To print your entire annual report, go to the reporting tool Home Page and click the "Printer Friendly Version" button. You will then be presented with a printer-friendly view of all of your worksheets. To print the report, click "Print". Once the report is printed, click the "Return" button to return to the Home Page. If you'd like to access the Data Dictionary for the academic year you selected, click on the Data Dictionary link at the top of the page.

To return to the current academic year report, select the current year from the "Reporting Year" drop-down menu.

13.0 Logging Off / Exiting the Reporting Tool

You can exit the Experimental Sites annual reporting tool at any time by clicking "Log Off" in the main tool bar. You will then be logged off the tool and sent to the Annual Reporting Tool Log In screen. You can then close your browser or navigate to another site.

14.0 Data Dictionary

Two Data Dictionaries have been developed for the Experimental Sites annual report. The Data Dictionaries provide detailed descriptions of each worksheet's data elements and tips on how to complete each item, including any specific range, sum, and/or cross edit check requirements. The first Data Dictionary includes information on the Demographics worksheet and the following nine experiments:

- Loan Proration
- Overaward Tolerance
- Loan fees in Cost of Attendance
- Credit of Title IV aid to Institutional Charges
- Credit Title IV Aid to Prior Term Charges
- Multiple Disbursements for Single Term Loans
- Thirty Day Delay for First Time First year Borrowers
- Entrance Loan Counseling
- Exit Loan Counseling.

The second Data Dictionary includes information on the Demographics worksheet and the Ability to Benefit experiment.

The Data Dictionary can be accessed from the main tool bar by clicking “Data Dictionary”. Depending on whether or not your school participates in the Ability to Benefit experiment, the system will retrieve the appropriate Data Dictionary for your school (remember that if you are accessing prior academic year data and click on the Data Dictionary link, you will be provided with that year’s Data Dictionary). The Data Dictionary will be an Adobe PDF file. If you do not have Adobe Acrobat, a link to the Adobe home page where you can download a reader is also provided in the main tool bar. Once you open the Data Dictionary, you can print it by clicking “File” and then “Print” in the Adobe main tool bar.

15.0 User Guide

This User Guide can be accessed from the main tool bar by clicking “User Guide”. The User Guide will be an Adobe PDF file. If you do not have Adobe Acrobat, a link to the Adobe home page where you can download a reader is also provided in the main tool bar. Once you open the User Guide, you can print it by clicking “File” and then “Print” in the Adobe main tool bar.

16.0 Help

The Help function provides you with contact information for assistance/questions in completing your annual report. To access the Help function, click the “Help” button on the main tool bar.

17.0 Feedback

The Feedback function gives you an opportunity to let us know what you think about using the online reporting tool and if there are any ways that we can improve our service. To access the Feedback function, click the “Feedback” button on the main tool bar. You will then be provided with a link to the Experimental Sites email address – ExperimentalSites@ed.gov – where you can send feedback.

18.0 Privacy

The Privacy function provides you with a link to information on the Department of Education, Federal Student Aid’s privacy policies. To access the privacy note, click the “Privacy” button on the main tool bar.

19.0 Questions/Contacts

If you have any questions on completing your annual report or on using the online reporting tool, please contact Warren Farr at 202-377-4380 or ExperimentalSites@ed.gov.

Appendix A

U.S. Department of Education
Federal Student Aid

Experimental Sites Initiative
Annual Report Online Tool
Request for New User Access

The following information is required for access to the Experimental Sites Online Annual Reporting Tool. Your school’s Experimental Sites Coordinator or other designated user must fill out the necessary information and fax the completed form to 202/275-4537 (Attention: Experimental Sites User Access).

- 1. Name _____
- 2. Title _____
- 3. Institution _____
- 4. OPE ID _____
- 5. Phone _____
- 6. Fax _____
- 7. Email _____
- 8. School Coordinator Name _____
- 9. School Coordinator Email _____
- 10. Create your User ID: _____
(Your User ID can include letters and/or numbers)

User’s Signature and Date

School Coordinator’s Signature and Date

NOTE: When this access request is processed, the requestor will be notified via email of their initial (temporary) password (the school’s Coordinator will receive a copy of the email). The User will log into the system using the User ID and password and will be immediately required to change the password.

| | |
|---|---|
| For Experimental Sites Team Use Only | |
| Date Received: | _____ |
| Access Issued: | Yes _____ No _____ Date _____ |
| | System Security Officer Signature _____ |

U.S. Department of Education
Federal Student Aid

Appendix B

Experimental Sites Initiative
Annual Report Online Tool
Request to Remove User Access

The following information is required in order to remove a user’s access to the Experimental Sites Online Annual Reporting Tool. The school’s Experimental Sites Coordinator must fill out the necessary information and fax the completed form to 202/275-4537 (Attention: Experimental Sites User Access).

- 1. User Name _____
- 2. Institution _____
- 3. OPE ID _____
- 4. School Coordinator Name _____
- 5. School Coordinator Email _____

School Coordinator’s Signature and Date

NOTE: When this removal request is processed, the school’s Experimental Sites Coordinator will be notified via email.

| |
|--|
| <p>For Experimental Sites Team Use Only</p> <p>Date Received: _____</p> <p>Access Removed: Yes _____ No _____ Date _____</p> <p>System Security Officer Signature _____</p> |
|--|