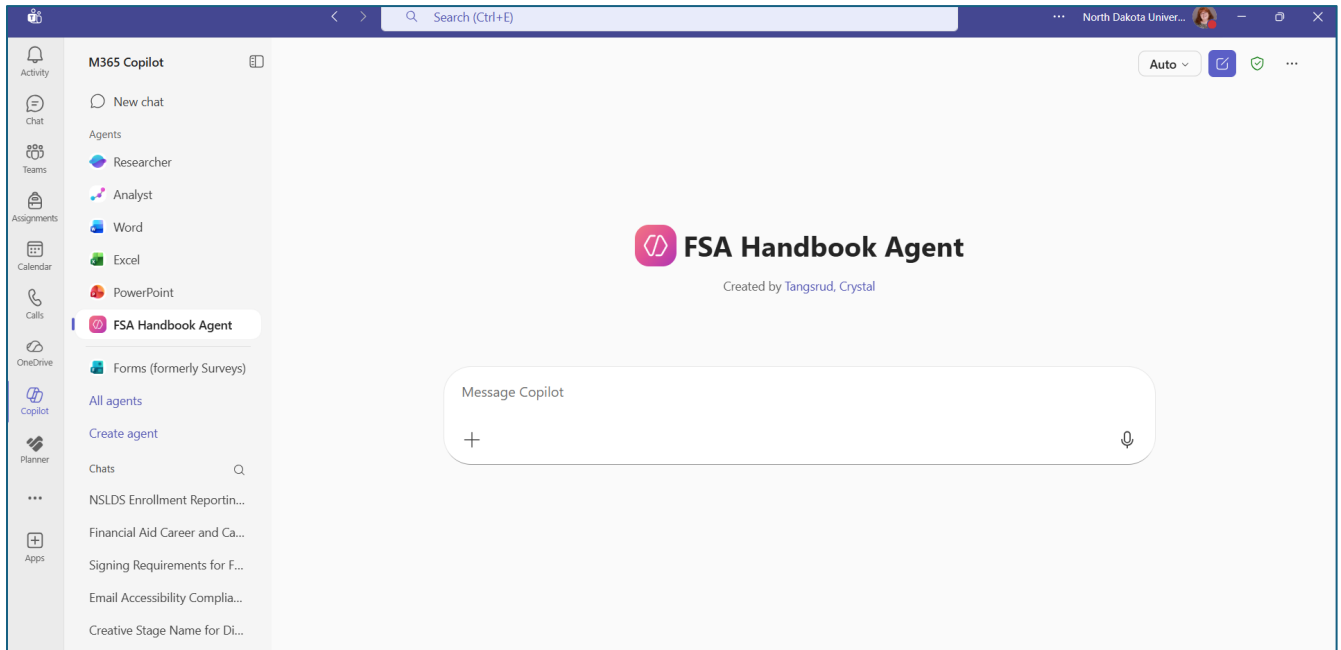
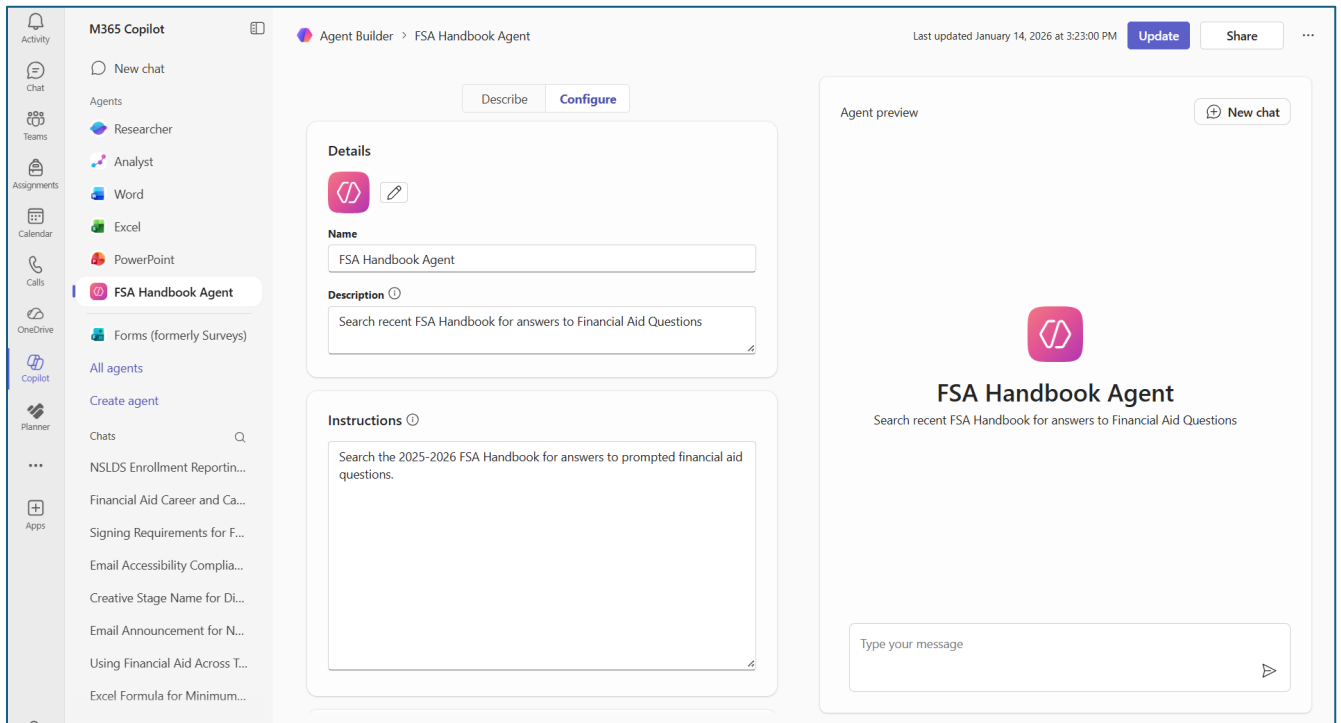


Setting Up a FSA Handbook Agent



1. In Teams click CoPilot
2. Click **Create Agent** on the right.




3. Give your agent a name and description
4. Give your agent clear instructions.









5. Provide it with the FSA Handbook URL: <https://fsapartners.ed.gov/knowledge-center/fsa-handbook/>
 - a. **Note:** If you use an aid year specific URL you will need to remember to provide your agent with a new URL annually.


Knowledge  


Choose the sources your agent will use to generate responses


Add files, meetings, chats, emails, and websites 


Enter a URL or name or drop files here  

Search all websites. To limit results to specific sites, [enter a URL above](#) 

Only use specified sources 


Reference org chart and profile info 

Websites




 <https://fsapartners.ed.gov/knowledge-center/fsa-handbook>

6. Allow your agent to create documents and images for you.

Capabilities

Create documents, charts, and code 

Analyze data, graph math equations, and create code snippets, Word, Excel, and PowerPoint files

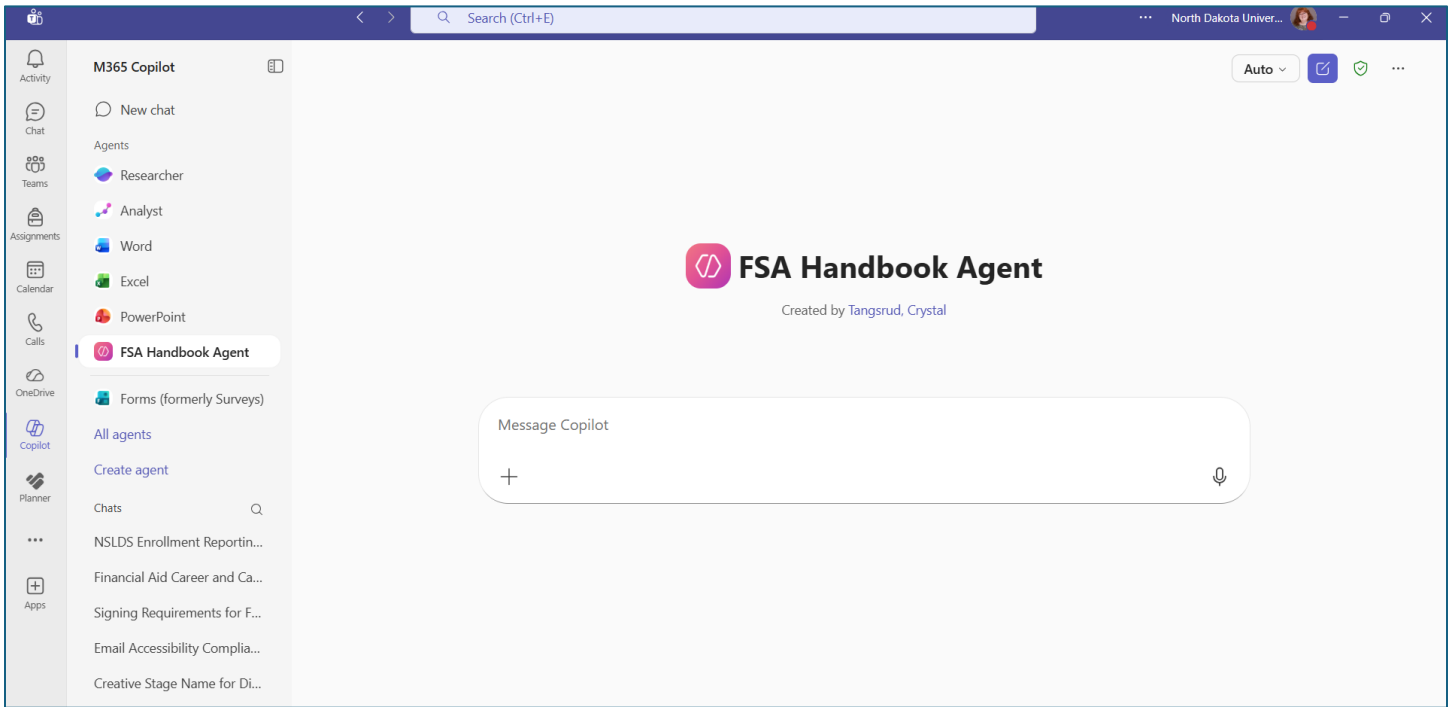
  

Create images

Create visual aids like images and art in response to user prompts

To use your agent:

In the CoPilot app in Teams. Click on your agent and ask your question! Make sure you review the response for accuracy.



Examples:

Today

for NSLDS enrollment reporting how often are we required to reprot

FSA Handbook Agent

For NSLDS enrollment reporting, the Federal Student Aid (FSA) Handbook requires schools to report on a regular, ongoing basis with a clear minimum standard:

Required Reporting Frequency

Schools must report enrollment information to NSLDS at least every 60 days. ed

This applies to all Title IV–eligible students, regardless of whether they are receiving aid in that term.

Reporting Changes in Enrollment Status

In addition to the 60-day minimum cycle:

- Any change in a student's enrollment status (e.g., withdrawal, graduation, less-than-half-time) must be reported within 30 days of the change ed
- This is especially important because enrollment status drives:
 - In-school deferment

does a 1040 need to be signed

 FSA Handbook Agent

Short answer: yes.

A **Form 1040 must be signed** to be considered a valid federal tax return.

What “signed” means

- **Paper return:** The taxpayer must sign and date the return.
- **Married filing jointly: Both spouses must sign.**
- **Electronically filed (e-file):** The signature is provided electronically (for example, via an **IP PIN** or prior-year AGI). That still counts as a valid signature.

An **unsigned 1040 is not a valid return** and can be rejected or treated as not filed.

Financial aid (FAFSA / verification) context

From a Federal Student Aid standpoint:

can financial aid from one term be used to pay charges in another term

 FSA Handbook Agent

Short answer: Usually no—but sometimes yes, with limits and authorization.

Under the 2025–2026 Federal Student Aid (FSA) Handbook, Title IV aid is tied to a specific payment period/term, and there are clear rules about when funds can be applied to charges from *another* term.

General rule

Financial aid must be used to pay charges for the payment period in which the aid is disbursed (e.g., fall aid pays fall charges). Schools cannot freely move aid between unrelated terms. ed

When aid *can* be used for charges in another term

- Prior-term charges (limited)