

BREAKOUT SESSION #18

Common Origination and Disbursement (COD) Update

Marie Fitzpatrick and Alanna Nelson

U.S. Department of Education

2023 FSA Training Conference for Financial Aid Professionals

AGENDA

1. Recent Changes


1. Pell Eligibility Restoration for Eligible Loan Discharges
2. New Campus-Based FWS Reporting

2. Upcoming Changes

1. Campus-Based Schema 1.0b
2. New Award Year Updates
3. New COD Schema 5.0b
4. Grant Processing Changes

3. Resources

RECENT CHANGES



PELL RESTORATION FOR LOAN DISCHARGES

Pell Eligibility Restoration for Eligible Borrower Defense Loan Discharges



PELL RESTORATION FOR LOAN DISCHARGE

- “Pell Lifetime Eligibility Used (LEU) Restoration for Eligible Loan Discharge” implemented 7/30/2023
 - New LEU Adjustment Type of “Restoration for Discharge”
 - Adjustment = Pell eligibility used during the corresponding eligible loan period discharged
- Notifications
 - Schools receives notification of a School File available for download identifying impacted students with a “Restoration for Discharge” adjustment
 - Students most impacted by the restored eligibility will receive an email notification
- Electronic Announcement(EA) posted 7/20/2023

NEW CAMPUS-BASED FWS REPORTING

FWS Wage Submission for 2024-25 FAFSA



NEW CAMPUS-BASED FWS REPORTING

- New Campus-Based schema implemented on July 30, 2023
- Schema version 1.0a and web reporting options available to report Federal Work Study (FWS) wages
- Reporting method options:
 - (1) By award year(s)
 - (2) One calendar year total
- Reporting person data, CPS transaction, and 2022 calendar year FWS wages ONLY

NEW CAMPUS-BASED FWS REPORTING

- COD will transmit FWS wages to FAFSA Processing System (FPS) to calculate Student Aid Index (SAI) for 2024-25 FAFSA submissions
- Resources:
 - Campus Based XML 1.0a Schema – posted March 6, 2023 (updated June 15, 2023)
 - 2023-2024 COD Technical Reference – updated with Volume 4 in May 2023
 - Operational Information – Reporting Federal Work-Study Earnings to the COD System Using the Campus-Based XML Schema Version 1.0a - posted July 21, 2023
 - Reminder EA - TBD

UPCOMING CHANGES



CAMPUS-BASED SCHEMA 1.0b

- New version 1.0b schema to report FWS wages
- All ***2023 calendar year*** records must be sent to COD using this new schema
- Records for 2022 calendar year may still be sent using older version of the schema 1.0a, or 1.0b,
 - Common record responses will be sent using whichever schema version they were sent to COD in
 - Web responses will be sent using version 1.0b only
- Schema posting in February 2024; anticipated implementation by early summer 2024

CAMPUS-BASED SCHEMA 1.0b

- **New Name Suffix Field (Person Level)**
 - Max Length of 10 characters
 - Optional; use instead of reporting the suffix in the Last Name field
- **Person Level Modifications**
 - “First Name” expanded to max length of 35 characters
 - “Middle Initial” becomes “Middle Name” with max length of 35 characters
 - “Postal Code” reduced to 10 characters
 - “Phone Number” reduced to 15 characters
 - “Country Code” new valid value of ‘XK’ for Kosovo
- **Award Level Modifications**
 - Fields with “CPS” updated to “FPS”

NEW AWARD YEAR UPDATES

- COD website screens default to 2024-25 award year for the New Award Year
 - “25” in 2024-25 award year message classes
 - “25” in 2024-25 Loan ID’s and MPN ID’s
 - Update preferences on Web search pages to change default award year
- Report format selections carry forward
- StudentAid.gov website processing options carry forward

SEQUESTRATION CHANGES

FY 24 sequester fee reductions are the same as the FY 23.

Direct Loans		
Earliest Disbursement Date	Sub/Unsub Orig Fee	PLUS Orig Fee
10/1/2020 – 9/30/2024	1.057%	4.228%

Teacher Education Assistance for College and Higher Education (TEACH) Grant		
First Disbursed	Percent Reduction	Maximum 2023-24 Award
10/1/2020 – 9/30/2024	5.7%	\$3,772.00

Iraq and Afghanistan Service Grant (IASG)		
First Disbursed	Percent Reduction	Maximum 2023-24 Award
10/1/2023 – 9/30/2024	5.7%	\$6,973.49

NEW COD SCHEMA 5.0b



NEW COD SCHEMA 5.0b

- All 2024–25 records must be submitted using the new schema version 5.0b
- Records for prior award years may be sent using older schema versions, or 5.0b
 - Prior year record responses will mirror whichever schema version was submitted
- All system-generated responses, regardless of award year, will be sent in 5.0b, including:
 - Unsolicited system-generated responses for all award years
 - COD Web Activity responses for all award years
- COD Common Record XML Schema Version 5.0b EA posted 9/21/2023

NEW COD SCHEMA 5.0b – NEW

- **Name Suffix Field (Person Level)**
 - Max Length of 10 characters
 - Optional for students and borrowers having a Last Name suffix such as Junior, II, Third, etc.
 - Use instead of reporting the suffix in the Last Name field
- **IASG and CFH Eligible tags (Award Level)**
 - True/False Field
 - Optional field returned in Pell response for recipients certified as eligible for Iraq Afghanistan Service Grant (IASG) or Children of Fallen Heroes(CFH) eligible on the FAFSA Partner Portal
- **Enrollment Intensity Percentage (Disbursement Level)**
 - Required for new 2024-25 Pell disbursements
 - Optional for maintenance
 - Whole number between 0 - 100

NEW COD SCHEMA 5.0b – MODIFIED

- **Person Level Modifications**

- “First Name” expanded to max length of 35 characters
- “Middle Initial” becomes “Middle Name” with max length of 35 characters
- “Postal Code” reduced to 10 characters
- “Phone Number” reduced to 15 characters
- “Country Code” new valid value of ‘XK’ for Kosovo

- **Award Level Modifications**

- Fields with “CPS” updated to “FPS”

- **Disbursement Level Modifications**

- *Up to 3* occurrences of “CIP Code” per disbursement for students enrolled in multiple programs in the payment period
 - One CIP code will still be required per disbursement

NEW COD SCHEMA 5.0b – REMOVED

Data elements eliminated from 5.0b

- Secondary EFC Code
- Award Linked Expected Family Contribution
- New Expected Family Contribution
- New DoD Match Flag
- Linked DoD Match Flag
- New Pell Eligibility
- New CPS Process Date
- Linked CPS Process Date
- New Scheduled Grant
- Issued Disbursement Amount
- Linked Pell Eligibility



NEW COD SCHEMA 5.0b

Field changes will result in systemwide changes

EDITS

- All edits updated to reflect new, modified and removed fields.
- New Warning Disburse edit 131 – Duplicate CIP code

REPORTS

- Reports will be Award Year specific to accommodate the many changes

GRANT PROCESSING CHANGES



PELL GRANT PROCESSING CHANGES

- 2024-25 Scheduled Award determination is formulaic*
- No Federal Pell Grant Payment and Disbursement Schedule
- Scheduled Award based on:
 - Student Aid Index (SAI),
 - Max Pell Indicator
 - Minimum Pell Indicator,
 - Iraq & Afghanistan Service Grant(IASG) Indicator,
 - Children of Fallen Heroes (CFH) Indicator,
 - Cost of Attendance(COA)

** Session B015 details Calculating the Scheduled Award*

PELL GRANT PROCESSING CHANGES

- All Scheduled Awards will be rounded to the nearest \$5 increment, with exceptions for low COA
- New Enrollment Intensity % field to calculate the Annual Award
 - In addition to, not in place of, Enrollment Status



IASG & CFH PROCESSING CHANGES

- 2024-25 IASG and CFH students are eligible for Pell Grant regardless of SAI
 - No separately funded program for Pell-ineligible IASG students
- No Department of Defense (DoD) Match flag eligible students
- ISIR transaction with Pell Elig Flag = “Yes” and IASG or CFH Indicator

IASG & CFH PROCESSING CHANGES

- All 2024-25 Pell Grant originations and disbursements for IASG and CFH students may be processed via batch or web submission
- Web Changes
 - “Post 9/11 Deceased Veteran Dependent Indicator” no longer populated after 2023-24
 - Pell Create/Update Award screens will display the unalterable “IAS Grant” or “CFH Indicator” fields if applicable
- IASG LEU converted to Pell LEU
 - New “IASG LEU” Pell LEU Adjustment Type
 - Converted LEUs exceeding 600% not eligible for Pell, but not in overaward

IASG & CFH PROCESSING CHANGES

MAIN IASG/CFH RETIRED EDITS

- Warning **Edit 192** for IASG
- Warning **Edit 224** for CFH
- Warning **Edit 168** for Post 9/11 Deceased Veteran Dependent Indicator

2024-25 COMMON RECORD RESPONSE

- New <IASGEligible> tag
 - Pell Award block
- New <CFHEligible> tag
 - Pell Award block

RESOURCES



RESOURCES

Posting Date	ID & Link	Title
10/13/2023	COD-23-06	COD Common Record XML Schema Version 5.0b (Updated Oct. 13, 2023)
8/4/2023	GEN-23-11	FAFSA Simplification Act Changes for Implementation in 2024-25
7/20/2023	GRANTS-23-06	Guidance on COD Processing of Pell Grant Restoration for Eligible Loan Discharges
7/21/2023	CB-23-13	Operational Information – Reporting Federal Work-Study Earnings to the COD System Using the Campus-Based XML Schema Version 1.0a
5/23/2023	COD-23-03	2023–2024 COD Technical Reference (May 2023 Update)
3/6/2023	CB-23-06	Campus-Based XML Schema Version 1.0a (Updated March 26, 2023)