

Additional COD System Changes – July 2017 **Attachment to June 2017 Electronic Announcement**

This document highlights the processing function enhancements and modifications we will implement during the July 14-16, 2017 period. We cover the information in the following order:

- Changes Impacting All Programs
- Changes Impacting the Direct Loan Program
- Changes Impacting the StudentLoans.gov Website

Changes Impacting All Programs

The following changes will impact the Common Origination and Disbursement (COD) System processing of Federal Pell Grant (Pell Grant), Iraq and Afghanistan Service Grant, Teacher Education Assistance for College and Higher Education (TEACH) Grant, and William D. Ford Federal Direct Loan (Direct Loan) awards.

Enhancements to the COD Batch Search and Search Results Functionality

We will make enhancements to the batch search functionality on the COD Web Site.

- *Batch Search* – The COD Batch Search page will be updated to provide additional search criteria flexibility. Following implementation, schools will be able to select one, multiple, or all award years when searching by Entity ID. The date range for the search period will also be expanded to allow a period of up to 180 days (instead of the current 60 days). The option for selecting one, multiple, or all award years will also be available when doing a person (SSN) search.
- *Batch Search Results* – The COD Batch Search Results pages will be updated to include additional information about the records in the search results. Schools will also have enhanced filtering capability to further refine the search results.
 - *Batch Search Results – Entity ID* – New columns will be divided and display the count of Accepted (A) and Rejected (R) records at the Student, Award, and Disbursement level respectively.
 - *Batch Search Results – SSN* – A new Disbursement Release Indicator (DRI) column will be added. Schools will be able to filter by award type, award year, DRI flag, or by edit number.
 - *Batch Information Detail page* – A new DRI column will be added. Schools will be able to filter by name or by edit number.

Updates to the Anticipated Disbursement Queue

In March 2017, we added a new Anticipated Disbursement Queue page to the COD Web Site where schools are able to search and view anticipated disbursements (DRI=False) currently on file on the COD System. Beginning July 16, 2017, we will make the following additional updates to improve the functionality and navigation of the Anticipated Disbursement Queue:

- *“Bread Crumb” Links* – We will add functionality so that users can return to the search page without having to re-enter the information from the beginning.
- *Disbursements in Closed Award Years* – A message will appear on the “Anticipated Disbursement Queue” page alerting the user that they may not be able to view select records if the records are not open for processing.

COD Web Site – Login Screen Changes

Beginning July 16, 2017, Federal Student Aid will modify the manner in which a user logs in to the COD Web Site. Similar to the current process for other Federal Student Aid websites, such as National Student Loan Data System (NSLDS), when a user clicks on the COD Web Site Home page login button, instead of being directed into the current COD Web Site login page, users will be redirected to Federal Student Aid’s Access and Identity Management System (AIMS) COD login page. The new login page will also include token management options. After a user logs in, the user will be redirected to the COD Web Site user role selection page and proceed as they currently do. **Note:** User credentials will NOT change; users will continue to use their current FSA User ID and password to log in.

Updates to the Closeout Process

Currently, there are some differences in the closeout process among the Direct Loan, Pell Grant, and TEACH Grant programs. Beginning July 16, 2017, we will modify the COD System to make the closeout process similar across programs and to streamline the processes. We will make the following changes:

Closeout Action	Before July 16, 2017	Beginning July 16, 2017
Balance Confirmation Process	The COD Web Site allows users to complete the closeout process for Direct Loans on the “School Balance Confirmation” page. Schools can complete this process for Direct Loans for all award years available on the COD Web Site.	<p><u>Direct Loans</u></p> <p>The “School Balance Confirmation” page will continue to be available for Direct Loans 2011-2012 and forward so schools can officially closeout an Award Year.</p> <p>Schools will no longer need to have a Zero Balance Letter on file to complete their Direct Loan Balance Confirmation process. Schools should still make sure they are using their School Account Statement to do a final month of reconciliation before confirming closeout.</p> <p><u>Pell Grant and TEACH Grant</u></p> <p>The COD Web Site will be updated to allow authorized users to complete the balance confirmation process via the “School Balance Confirmation Page” for Pell Grant and TEACH Grant. This process will be available for the 2016-2017 Award Year and forward.</p> <p>Schools should ensure they are reconciling to a zero balance before confirming</p>

Closeout Action	Before July 16, 2017	Beginning July 16, 2017
		<p>closeout.</p> <p>Note: Balance confirmation will allow schools to receive a Program Year Closeout Letter to document completion of final reconciliation. It will also allow for tighter controls over available funding and data submission. For more information on data submission see Edits below.</p>
Reopen Functionality	Currently, requests to reopen a Direct Loan Award Year that was previously confirmed closed out prior to the submission deadline, must be made by contacting COD School Relations. The request is then sent to Federal Student Aid for manual processing.	<p>The COD Web Site will be updated to add reopen functionality for schools to the new "Request Reopen/Extended Processing" page This new functionality will immediately allow a school to "reopen" processing for any program (Direct Loan, Pell Grant, or TEACH Grant) and/or award year that has not passed the data submission deadline, but where the school has previously and successfully confirmed closeout. This will allow a school to continue to process for that program and/or award year until it completes the confirmation process again or the data submission deadline passes.</p> <p>Note: Once the data submission deadline has passed, a school will need to request and be approved for Extended Processing before further data will be accepted by the COD System as outlined in updated edits below. Schools will use the "Request Reopen/Extended Processing" page on the COD Web Site for these requests. This page was previously labeled "Request Post Deadline/Extended Processing". The type of request (Reopen or Extended Processing) is managed by the system and should appear seamless to the user.</p>
School Correspondence	School closeout correspondence for the Direct Loan and TEACH Grant programs are systematically sent to schools and are viewable on the COD Web Site's "School Correspondence" page.	<p>New COD System-generated closeout correspondence has been added to the COD Web Site for the Pell Grant and TEACH Grant programs. School correspondence for all programs has been streamlined and revised to reflect current and updated closeout processes and procedures.</p> <p>All closeout correspondence will be viewable on the COD Web Site under the "School Correspondence" page. For ease of access, correspondence will be organized</p>

Closeout Action	Before July 16, 2017	Beginning July 16, 2017
		<p>by Program including a new Non Program Specific area.</p> <p>More information on the types of available closeout correspondence can be found in Volume II, Section 1 of the COD Technical Reference.</p>
Balance Changes after School Confirms Closeout	For Direct Loans only if a school's balance changes after a school is confirmed closed out, a school is notified of the change via system-generated correspondence. The school must request to be reopened or granted Extended Processing to submit additional data.	For all programs (Direct Loan, Pell Grant, and TEACH Grant), schools will no longer be considered confirmed closed in the COD System if their balances change. If this happens before the data submission deadline, schools will be able to resume processing immediately without requesting to be reopened. If this happens after the data submission deadline, schools may need to request and be approved for Extended Processing based on updated edits listed below. Schools will be notified of the change in balance via system-generated correspondence.
COD Reject Edit 43	Schools receive this edit if they submit an award (Direct Loan, Pell Grant, or TEACH Grant) before the earliest date to process a common record or after the latest date to process a common record and the school is not on Extended Processing. Schools will also receive this edit on Direct Loan awards if submitted after the school has completed/confirmed closeout (via the balance confirmation process).	<p>In addition to the current triggers, schools will also receive this edit if they submit Pell Grant or TEACH Grant awards after the school has completed/confirmed closeout (via the balance confirmation process).</p> <p>Note: The enhancement to the closeout process does not alter schools' ability to send in Pell Grant downward adjustments for any award years on the COD Web Site. Also, the enhancement will not alter schools' ability to make changes to awards or disbursements for students in a Pell Grant Potential Overaward Project (POP) situation.</p> <p>More information about this edit can be found in Volume II, Section 4 of the COD Technical Reference.</p>
COD Reject Edit 71	<p><u>All Programs (Direct Loan, Pell Grant, or TEACH Grant)</u></p> <p>Schools receive this edit on a new actual disbursement or maintenance record if:</p> <ul style="list-style-type: none"> • Submitted before the Earliest Date to Accept a 	<p>In addition to the current triggers, schools will also receive this edit if they submit Pell Grant or TEACH Grant disbursements or adjustments, or change the DRI from False to True after the school has completed/confirmed closeout (via the balance confirmation process).</p> <p>Note: The enhancement to the closeout</p>

Closeout Action	Before July 16, 2017	Beginning July 16, 2017
	<p>Common Record.</p> <ul style="list-style-type: none"> Submitted after the Latest Date to Accept a Common Record and the school is not on Extended Processing. <p><u>Direct Loan Only</u></p> <p>In addition, schools receive this edit on a new actual disbursement or maintenance record if:</p> <ul style="list-style-type: none"> Submitted after the school has completed balance confirmation closeout. <p><u>Pell Grant Only</u></p> <p>This edit is bypassed for downward disbursement adjustments, and for disbursements being corrected due to Pell Grant POP.</p>	<p>process does not alter schools' ability to send in Pell Grant downward adjustments for any award year on the COD Web Site. Also, the enhancement will not alter schools' ability to make changes to awards or disbursements for students in a Pell Grant POP situation.</p> <p>More information about this edit can be found in Volume II, Section 4 of the COD Technical Reference.</p>

For more information on closeout or extended processing in the COD System, refer to [Volume II, Section 1 of the 2017-2018 COD Technical Reference](#) posted on the IFAP website.

Session Timeout Pop-Up Message Added to the COD Web Site

We will add a "session time-out" warning message to the COD Web Site. Currently, after 15 minutes of inactivity a user is automatically logged out of the site. Beginning July 16, 2017, a warning message will appear and remain on the screen when a user has 5 minutes or less remaining before being automatically logged out of the COD Web Site. Once the pop-up screen appears, users will have the option of selecting "Keep Active" to remain logged into the COD Web Site. If no action is taken, a user will be logged out at the end of the 5-minute warning.

Changes Impacting the Direct Loan Program

The following change will impact the COD System processing of Direct Subsidized Loan, Direct Unsubsidized Loan, and Direct PLUS Loan awards.

Modifications to the 150% Direct Subsidized Loan Limit Functionality

Beginning July 16, 2017, the COD Web Site will be updated to improve processing and the accuracy of 150% Direct Subsidized Loan Limit calculations.

For complete operational implementation information for the COD System changes specific to the 150% Direct Subsidized Loan Limit, refer to the June 2017 Electronic Announcement posted on the IFAP website.

Changes Impacting the StudentLoans.gov Website

The following change will update what a user sees on the StudentLoans.gov website.

New Federal Loan Servicer Information Section

The StudentLoans.gov website will be updated to include Federal Loan Servicer(s) information section called “My Loan Servicer” which will be located on the “My Home Page” page on the right side of the screen below the “My Profile” section. The new servicer information section will display the servicer’s contact information and eligible loan data for that specific borrower. **Note:** A borrower must be logged in to see the new servicer information section. In addition, only a borrower who has eligible loan data associated to a servicer(s) on file in the National Student Loan Data System (NSLDS) at the time of log in will have his or her servicer’s information displayed.

Removal of the Servicer Eligibility Check for FFEL Borrowers

The StudentLoans.gov website will be updated to remove the servicer eligibility check at the beginning of the Income-Driven Repayment (IDR) Plan request to allow additional borrowers to complete the form online. Borrowers who only have a Federal Family Education Loan (FFEL) program loan(s) with servicers that do not participate in the online process will now be able to complete the IDR Plan request online. While this group of FFEL-only borrowers cannot submit the online application on the StudentLoans.gov website, they will be provided instructions on how to print and mail their pre-populated form to their servicer(s).

Income-Driven Repayment Anniversary Date Information

With this release, the IDR Plan Request application on the StudentLoans.gov website will include an Anniversary Data lookup functionality to guide users on when to recertify their income and family size.