NASFAA 2003: Reconnecting With Students!

NASFAA 2003

SALT PALACE CONVENTION CENTER

SALT LAKE CITY, UT ★ JULY 9-12

The Common Record - COD
An Update on COD and XML

Objectives

- ## XML
  - ➢ FSA Business needs and XML Benefits
  - ➢ Framework
  - ➢ Community Standard Update

- ## COD
  - ➢ COD Status Update
  - ➢ Common Record changes for 2004-2005

FSA Business Needs

- Reduce redundant data storage

- Improve customer relationships

- Increase accuracy of analytics

- Increase efficiency in data handling

- Reduce costs

Common Record – XML Benefits

➢ XML is a meta language – allowing trading partners to develop markup languages.

➢ XML is hierarchical in nature – can represent more complex relationships.

➢ XML blocks can be repeated – making information sharing more flexible.

➢ XML schemas define advanced relationships that are not possible in standard flat files.*

Common Record – FSA, CommonLine, and PESC

➤ Shared Goal of developing an XML Higher Education Standard.

➤ Shared Lessons Learned (Technology and Implementation)

➤ Working with Electronic Standards Council (ESC) as they develop the Common Record: CommonLine.

➤ Provide Project Management assistance to PESC as they developed the Academic Transcript schema and the CommonRecord: CommonLine schema.

Common Record – FSA's XML Framework

- XML Strategic Assessment and Enterprise Vision
- XML Technical Reference and Usage Guidelines
- XML Core Component Dictionaries
- XML Registry and Repository
- XML Framework Communications Strategy
- XML ISIR Performance Test and SAIG Capacity Plan

Common Record – Current State

- **Negotiations with Community**
  - PESC
    - Academic Transcript
  - ESC
    - Common Record CommonLine

- **XML Framework 10-31-03**

Common Record Estimated Implementation Schedule

ISIR

COD

	ISIR	COD
02-03		Common Record – COD v 1.0g
03-04		Common Record –COD 2.0c (changed all tag names)
04-05		Common Record –COD 2.0d (+2 new tags – 6 old tags)
05-06	Common Record – ISIR 1.0a Align with standard	Common Record – COD 3.0 Align with standard (XML Required)
06-07	Common Record – ISIR 1.0a (XML Required)	Common Record – COD 3.0a
07-08	Common Record – ISIR 1.0a	Common Record – COD 3.0b

COD Record Processing
YTD – as of July 1, 2003

02-03	Originations (#)	Originations ($)	Actual Disbursements (#)	Actual Disbursements ($)
Direct Loan PLUS	231,876	$1.6 billion	417,178	$1.5 billion
Direct Loan Subsidized	1.8 million	$5.8 billion	3.0 million	$5.3 billion
Direct Loan Unsubsidized	1.3 million	$4.6 billion	2.1 million	$4.2 billion
Pell	5.3 million	$15.7 billion	11.3 million	$11.4 billion
TOTAL	8.7 million	$27.8 billion	16.9 million	$22.4 billion

COD Record Processing
YTD – as of July 1, 2003

03-04	Originations (#)	Originations ($)	Actual Disbursements (#)	Actual Disbursements ($)
Direct Loan PLUS	24,971	$247 million	163	$533,415
Direct Loan Subsidized	259,080	$1.1 billion	15,472	$33.8 million
Direct Loan Unsubsidized	166,290	$818.3 million	9,692	$25.8 million
Pell	197,565	$625.6 million	17,406	$20.3 million
TOTAL	647,906	$2.7 billion	42,733	$80.5 million

Common Record Processing
YTD – As of July 1, 2003

02-03

	Received	Accepted	Rejected	TOTAL
Direct Loan PLUS	262,500	183,453	78,648	262,101
Direct Loan Subsidized	820,352	793,588	26,066	819,654
Direct Loan Unsubsidized	640,571	620,565	17,955	638,520
Pell	884,301	821,825	55,263	884,072
TOTAL	2.0 million	2.4 million	177,932	2.6 million

Common Record Processing
YTD – As of July 1, 2003

03-04

	Received	Accepted	Rejected	TOTAL
Direct Loan PLUS	18,164	17,214	688	17,902
Direct Loan Subsidized	119,578	109,238	9,594	118,832
Direct Loan Unsubsidized	104,119	96,923	6,734	103,657
Pell	128,689	110,768	7,314	118,765
TOTAL	227,382	227,643	24,330	252,266

Common Record Changes for 2004-2005

COD will accept Phase-in Participant records in 2004-2005

- All schools **must** be Full Participants using the XML Common Record in 2005-2006

Common Record Changes for 2004-2005

- The following tags will not be required for 04-05 and upcoming years:
  - ➤ <AcademicCalendarCode>
  - ➤ <PaymentMethodologyCode>
  - ➤ <WeeksUsedCalculate>
  - ➤ <WeeksProgramAcademicYear>
  - ➤ <HoursAwardYear>
  - ➤ <HoursProgramAcademicYear>

- If a school submits data in these tags, the COD system will not store or edit this data

- These tags continue to be applicable for prior award years and for Phase-in Participants

Common Record Changes for 2004-2005

- Two new informational tags will be added to the Response block:
  - \<CPS Verification Indicator\>
  - \<CPS Highest Transaction Number\>

- \<CPS Verification Indicator\> will be returned in response for Pell actual disbursement if the student was selected for verification on any CPS transaction number and the school did not report 'V' or 'S'

Common Record Changes for 2004-2005

- <CPS Highest Transaction Number> will be returned in response for Pell actual disbursement if a CPS transaction number higher than the one reported by the school

- An optional Verification Status Report will be sent to schools monthly by indicating students selected for verification by CPS that schools have not yet verified

Message Class Changes for 2004-2005

- Full Participants will have the option of using message classes that are specific by
  - Program
  - Award Year
  - Program and Award Year
  - General (e.g. COMRECIN, COMRECOP)
  - Receipts

- The 04-05 COD Technical Reference draft published in August 2003 will contain specific message class names

SAIG Transmission Header Changes for 2004-2005

- SAIG has increased the variable field on the SAIG Transmission Header from 26 characters to 50 characters

- The SAIG Transmission Header will be populated with the entire Document ID for Full Participants and the Batch ID for Phase-In Participants

- If a school uses the variable space for other data on the incoming record, COD will not overwrite this data with the Document ID or the Batch ID

COD Technical Reference for 2004-2005

- 2004-2005 COD Technical Reference will contain volumes for Full Participants, Pell Phase-in Participants, and Direct Loan Phase-in Participants

- Draft containing record layouts, message classes, schema and edits will be published in August 2003

- Final version including implementation guide and appendices will be published in November 2003

- Change pages will be published quarterly as needed

Software Developers Conference
August 14-15, 2003

- Crystal Gateway Marriott in Arlington, VA

- Detailed review of changes to the COD Technical Reference record layouts, edits, and message classes

- Get more information and register online at http://edeworkshop.ncspearson.com/swdAugust03.htm