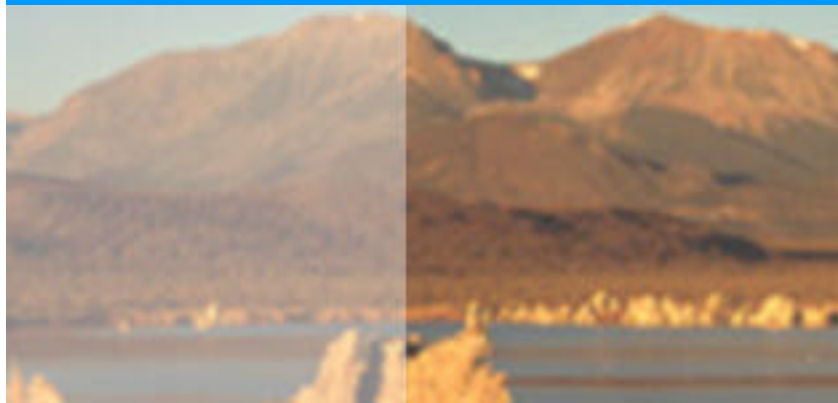


*NASFAA 2003: Reconnecting
With Students!*





COD and Pell Processing





Objectives

- What is the status of Pell in COD?
- What's New for Pell and COD?
- Tools for Funds Management
- Pell and COD Processing Updates





Pell Status

- Verification Initiatives
- Verification “W”
 - Warning messages
 - De-obligation
- Administrative Cost Allowance
- Initial Authorizations for 03-04
- POP – How are we doing?





Administrative Cost Allowance

- Identified code issues with the Unduplicated Recipient Count resulted in incorrect ACA payments being displayed on the COD web site for some schools
- Payments were delayed until appropriate code fix
- Corrected ACA payments have been sent to schools





POP Process

NEW

OLD

Overawards allowed to exist for 30 days

Pell did not allow overawards for any period of time

MRR is produced informing all schools involved of the situation and providing contact information

MRR is produced informing all schools involved of the situation and providing contact information

If after 30 days the situation has not been remedied, all schools involved will receive a negative disbursement. Eligible school can submit a positive disbursement at any time

Required submission of a negative disbursement from ineligible school first and then a positive disbursement from the eligible school



Why New POP Process?

- School Feedback
 - Complaints indicated improvements were needed
- Removal of reliance on schools that can't respond
- Allows funds to flow instead of inhibiting funds





Why New POP Process?

- Unofficial Withdrawals
- School Choice: Summer Header/Trailer
- Identification of Mid-Year Transfers
- Enhanced Web Information Readily Available





Students in POP

As of May 2003



	2001-2002	2002-2003
Blocked At One Time	88,890	16,117
Resolved	48,020	14,231
Still in Conflict	25,645	1,893
Unblocked but Unpaid to Date	15,225	0

LEFT BEHIND



POP on the Web: Before Adjustments



U.S. DEPARTMENT OF EDUCATION
COMMON ORIGATION & DISBURSEMENT



Person **School** **Batch** **Award** **Reports** **User** **Program**

► **Person Search**

▼ **Person Info**

Detail
All Awards
Direct Loan
Pell
Promissory Notes
Events
Correspondence

► **Pnote Search**

► **Credit Check Search**

Person Pell Information

? **HELP**

SAMPLE STUDENT

02/29/1952

Pell Grant Summary

Year	School	Eligibility Used	POP Flag	POP Start Date	POP End Date	Award Amount Approved	Scheduled Award Amount
'02-'03	FAULKNER UNIVERSITY	100.000%	Y	11/15/2004		\$4,000.00	\$4,000.00
'02-'03	HUDSON VALLEY COMMUNITY COLLEGE	100.000%	Y	11/15/2004		\$4,000.00	\$4,000.00
Total:		200.000%					

Mar 17 2003 12:25 EST

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POP on the Web: After De-obligation



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Person School Batch Reports User Program

► **Person Search**

▼ **Person Info**

[Detail](#)

[All Awards](#)

[Pell](#)

[Events](#)

[Correspondence](#)

► **Pnote Search**

►

SAMPLE STUDENT

10/20/1903

Pell Grant Summary

Year	School	Eligibility Used	POP Flag	POP Start Date	POP End Date	Award Amount Approved	Scheduled Award Amount
'02-'03	TUSKEGEE UNIVERSITY	0.000%	N	04/24/2004	05/25/2004	\$4,000.00	\$4,000.00
'02-'03	UNIVERSITY OF ALABAMA	0.000%	N	04/24/2004	05/25/2004	\$4,000.00	\$4,000.00
'02-'03	UNIVERSITY OF ALABAMA AT BIRMINGHAM	0.000%	N	04/24/2004	05/25/2004	\$4,000.00	\$4,000.00
'02-'03	COVENANT COLLEGE	0.000%	N	04/24/2004	05/25/2004	\$4,000.00	\$4,000.00
Total:		0.000%					



Tools for Resolving POP

- Edit codes returned on disbursement records
 - Full Participant: 68 or 69 (for concurrent enrollment)
 - Phase-In: 411 or 410 (for concurrent enrollment)
- MRR
 - MRR is produced for conflicting disbursements
 - Contains information on all schools involved and their contact information
 - Imported via SAIG mailbox
- Report of cumulative students in POP is in development and will be available to schools in 2004-2005
- Department is monitoring edit 55





After 30 days if neither school adjusts...

- System generated negative disbursement
 - Full Participant: Common Record Doc Type ND
 - Phase-In Participant: Batch Type #G
- Customer Service Outreach
 - Phone Call
 - Email





What's New?





Pell Changes for 2003-2004: Record Layouts

- <NegativePendingAmount>
 - New for **Full Participants**
 - Returned on the Common Record Response document for Document Type = RS with edit code 040 "Changed Award Amount is Less Than Total Disbursements"
 - Indicates the amount by which disbursement(s) will be reduced if action is not taken by the school within 30 days





Pell Changes for 2003-2004: Verification Initiatives

- Verification Status Code:
 - Added 'S' = Selected, but not Verified
 - <VerificationStatusCode> tag on Common Record Layout for **Full Participants**
 - Verification Status field on Origination Record and Origination Acknowledgement for **Phase-In Participants**





Pell RFMS Data Conversion

- Conversion of data from RFMS to COD will be complete by the end of the summer
- RFMS award years 99-00, 00-01, 01-02 will be processed by the COD system after the RFMS conversion is complete





Pell RFMS Data Conversion

- Conversion should be seamless for schools since the COD system will work with schools' present software and will accept and retrieve prior award year information in RFMS formats where applicable. However, certain RFMS business functionality will change with the conversion to the COD system
- Important information about business rule changes will be detailed in forthcoming P-messages and IFAP postings





Timeline for RFMS Conversion



- July 1 **Web message** on RFMS web site alerted schools that RFMS will stop processing at the end of July
- July 25 **Last day records must be submitted** in order to guarantee complete processing of reports from the RFMS system
- July 31 **Last day of RFMS processing**





Timeline for RFMS Conversion

AUGUST

- August 1-18
- August 18

SEPTEMBER

- September 9

RFMS Conversion – Records submitted after July 31 will be held in the SAIG mailbox until the conversion is complete

COD begins processing. Data from the 99-00 award year through the present will be available on the COD web site

Last day the RFMS web site will be available for inquiry





COD Focus Group

May 15-16, 2003

- Over the course of two days, 24 schools and 5 vendors generated hundreds of ideas on the following topics:
 - Reports
 - COD Web Site
 - Common Record/Schema
 - Customer Service
 - Direct Loan Processing
 - Pell Processing
 - Edits
- We have incorporated some of these ideas into changes for the 2004-2005 Award Year
- Thank you for participating in the 2004-2005 Requirements gathering process.
- If you would like to participate in future focus groups, please give a COD team member your business card





Participant Status 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
- Reminder: EDEExpress users are Full Participants beginning in 2003-2004





Pell Changes for 2004-2005: Record Layouts

- The following data elements will not be required on the Common Record for the 04-05 award year and subsequent years:
 - Academic Calendar Code
 - Payment Methodology Code
 - Weeks of instructional time used to calculate payment
 - Weeks of instructional time in program's definition of award year
 - Credit/Clock hours used to calculate payment
 - Credit/Clock hours in this student's program of study's academic year
- If a Full Participant school submits data in these tags, the COD system will not edit or store the data and will not return these tags on a Full Response
- These tags will continue to be edited and stored for Phase-In Participants and will be returned in the Acknowledgement





Pell Changes for 2004-2005: Verification Initiatives

- 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 disbursements if the student was selected for verification on any CPS transaction number and the school did not report 'V' or 'S'





Pell Changes for 2004-2005: Verification Initiatives

- <CPS Highest Transaction Number> will be returned in response for Pell actual disbursements if a CPS transaction number higher than the one reported by the school exists
- A Verification Status Report will be sent to schools monthly indicating those students selected for verification by CPS that schools have not yet verified (QA schools excluded)





Campus Based Changes for 2004-2005

- COD will accept and process all Campus Based student award and disbursement data from Full Participant schools for the 03-04 and 04-05 award years and forward
- Campus Based student award and disbursement data will be viewable on the COD web site





COD Web Site Changes for 2004-2005

- New web page will display student data from CPS applicant system
 - Users will have the ability to search applicant data by SSN, or by SSN and award year





COD Web Site Changes for 2004-2005

- “Batch ID” will be changed to “Document ID”
- Batch Search Results List
 - Batch Search screens will contain Award Type and Doc Type fields and permit filtering by these fields
 - Date Received and Date Response field will be separated into two individual fields. Date Received will indicate the date the batch was received by COD and Date Response will indicate the date COD sent a response to the school
- Batch Record Detail
 - Batch Record Detail will be split into two portions. The upper portion will contain the batch information sent by the school and the lower portion will contain the data sent out by COD in the batch response and in system generated responses





Back



Forward

Batch Search Results

Address https://cod.1



Go

Google

Search Web

Search Site

News

Page Info

Up

Highlight

▼ Batch Search

► Action Queue

► Pell Data Requests

Search Results

HELP

Click on a Batch ID from the list below to view detailed information about the Batch.

Entity ID	School Name	Begin Date	End Date
71740076	SAMPLE UNIVERSITY	06/02/2003	07/31/2003

Batch Type Award Year All

Records 1 to 25 of 25

Batch ID	Date Received / Date Response Sent	Status	Students	Accepted	Rejected
2003-06-25T10:43:43.0000000001	06/25/2003	Accepted	2	2	0
2003-06-25T10:43:42.0000000001	06/25/2003	Accepted	1	1	0
2004-09-01T13:09:39.6571740076	06/13/2003	Accepted	1	1	0
2004-09-01T13:09:39.656	06/13/2003	Accepted	1	1	0
2004-08-31T09:42:56.524	06/13/2003		1	1	0
2004-08-31T09:39:51.3071740076	06/13/2003	Accepted	1	1	0
2004-08-31T09:39:51.304	06/13/2003	Accepted	1	0	1
2004-08-31T09:26:51.585	06/13/2003		1	1	0
2003-06-05T14:41:25.0000000001	06/05/2003	Accepted	1	1	0
2004-07-25T11:42:06.6271740076	06/05/2003	Accepted	1	1	0
2004-07-25T11:42:06.629	06/05/2003	Accepted	1	1	0
2004-07-25T11:39:29.0971740076	06/05/2003	Accepted	1	1	0
2004-07-25T11:39:29.094	06/05/2003	Accepted	1	1	0
2003-06-05T11:40:40.0000000001	06/05/2003	Accepted	1	1	0
2004-07-24T10:31:38.2471740076	06/05/2003	Accepted	1	1	0



Back



Forward

Address https://cod.u.



Batch Award Detail



Go

View Award Information

HELP

SAMPLE UNIVERSITY

03-'04

Common Record Information

Batch ID	2004-09-01T13:09:39.6571740076
Attending Entity ID	71740076

Student

Student Name	MONROE
SSN	999919100
Date of Birth	04/15/1985
Loan Default / Grant Overpay	Z

Award Information

Award ID	999919100U04G26171001
Award Year	'03-'04
Award Number	1
Award Amount	\$1,000.00
Award Start Date	05/01/2004
Award End Date	09/01/2004
College Year	0
CPS Trans Number	1
School Use Only	
Disclosure Print Indicator	S





COD Web Site Changes for 2004-2005

- An Award Year drop down box will be added to the Person Pell Information page enabling user to filter by Award Year
- Award Amount Disbursed and Award Amount Approved will be added to Person Pell Information page
- COD Customer Service email address will be added to the Contact Us web page



File Edit View

Back

Address https://

Google

Search Web

Search Site

News

PageRank

Page Info

Up

Highlight

Pell Award



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**Person****School****Batch****Award****Reports****User****Person Search****Person Info**

Detail

All Awards

Direct Loan

Pell

Promissory Notes

Credit Check

Events

Correspondence

Pnote Search**Credit Check Search**

Person Pell Information

[? HELP](#)

SAMPLE STUDENT

04/10/1700

Pell Grant Summary

Year	Attending School	Eligibility Used	POP Flag	POP Start Date	POP End Date	Award Amount Approved	Scheduled Award Amount
'03-'04	BATON ROUGE COLLEGE	0.000%				\$4,000.00	\$4,050.00
Total for '03-'04:		0.000%					

CREATE NEW AWARD



Back



Forward

Contact Us



Go



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Contact Us

[? HELP](#)

Please use this screen to enter feedback (i.e., problems, enhancements, comments, etc.) about the Common Origination and Disbursement Site. Please include your email address.

**Return E-Mail
Address:**

**Type your message
here:**

SUBMIT**CANCEL**

To contact Customer Service by phone, please call the numbers below:

Pell 1-800-474-7268

Direct Loan 1-800-848-0978



COD Web Site Changes for 2004-2005

- School Report Options can be set on the COD web site
 - Schools will be able to define sort options, delivery options, and format options via the web site
 - Specific options will vary based on report
 - More information on the options for each report will be available in the Technical Reference Appendices published in November 2003





Back

Address



Google

Report Selection



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Person

School

Batch

Award

Reports

User

► **School Search**Return to: [School List](#)▼ **School Information**

School Summary
Financial Aid Contact
Eligibility
General
Options
Funding Info
Summary Financial Info
Refunds of Cash
Cash Activity
Events
Message List
Yearly Totals
Relationships
Balance Confirmation
Request Post Deadline
Processing
Correspondence
Report Selection

Report Selection

[? HELP](#)

SAMPLE UNIVERSITY

Program

Direct Loan

Award Year

'03-'04

**30 Day Warning:**

Comma Delimited

**Disbursement Activity Not Yet Booked at Servicing:**

Comma Delimited

**Duplicate Student Borrower**

Comma Delimited

**Funded Disbursement List**

Comma Delimited

**Inactive Loans**

Comma Delimited

**Pending Disbursement List**

Comma Delimited



SAS

[Modify SAS Options](#)**SUBMIT**



COD Web Site Changes for 2004-2005

- GAPS Debit Date will be added to the Cash Activity screen on the COD web site
- The GAPS Debit Date will indicate the date that the funds are expected to post to the school's account
- Calculations on the Cash Activity screen will be corrected





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 Timeline

- 2004 – 2005 Development Schedule:

- | | |
|-------------------------|---------------|
| ➤ Requirements Complete | June 2003 |
| ➤ Design Complete | August 2003 |
| ➤ Development Complete | November 2003 |
| ➤ Testing Complete | February 2004 |
| ➤ School/Vendor Testing | February 2004 |
| ➤ System Start Up | March 2004 |





Tools for Funds Management





New Warning Edit: 02-03

- Edit 55 – “Disbursement Information Received 30 Days or More After Date of Disbursement”
- Applies to both Pell and Direct Loan
- Through May 2003, 2304 schools received Edit 55
- 500,005 occurrences through May 2003
- Program violation of 30 day reporting requirement
 - For Pell, annual deadline notice





Cash Management Tools for All Schools

- COD provides schools tools for cash management:
 - Current Funding Level (CFL)
 - Available Balance
 - Substantiating Drawdowns
 - Unsubstantiated Cash Balance
 - Aging of Drawdowns





Current Funding Level (CFL)

- The CFL is set at a level sufficient to make funds available to cover the initial disbursement needs for each school receiving funds under the advance payment method
- The CFL is akin to the authorization level for the Pell program
- The CFL increases throughout the year as schools submit and COD accepts actual (not anticipated) disbursement records which substantiate funds that have been drawn





Available Balance

- The difference between the CFL and drawdowns (cash at school)
- The available balance is the amount a school can request at any point prior to substantiating more draws





Substantiating Drawdowns

- To substantiate a draw means to submit and have COD accept actual disbursement records that equal the amount of cash drawn or pushed to the school
- All draws must be substantiated timely in order to comply with the 30 day reporting requirement
- COD will match actual disbursements to drawdowns on a first-in/first-out basis
- Each drawdown will be aged to see how long it takes a school to “substantiate” the draw





Unsubstantiated Cash Balance

- The difference between cash at school and substantiated draws
- Lets a school know at any point what amount of funds have not been substantiated
- If a school does not substantiate cash drawn in a timely manner:
 - Call from Customer Service and warning messages
 - Freeze cash request (further funds will be temporarily stopped until draws have been substantiated)
 - Call for cash (school will be required to return unsubstantiated amounts)





Aging of Drawdowns

- Schools, Customer Service, and FSA can use the COD Website to see:
 - Each drawdown
 - Unsubstantiated Cash Balance
 - Available Balance
 - The number of days since the drawdown





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[Person](#)[School](#)[Batch](#)[Award](#)[Reports](#)[User](#)[▶ School Search](#)[▼ School Information](#)[School Summary](#)[Financial Aid Contact](#)[Eligibility](#)[General](#)[Options](#)[Funding Info](#)[Summary Financial Info](#)[Refunds of Cash](#)[Cash Activity](#)[Events](#)[Message List](#)[Yearly Totals](#)[Relationships](#)[Balance Confirmation](#)[Request Post Deadline](#)[Processing](#)[Correspondence](#)[Report Selection](#)

School Funding Information

[? HELP](#)

SAMPLE UNIVERSITY

Funding Information

Program

PELL

Award Year

'03-'04

Entity ID	71740076
Initial CFL	\$65,000.00
Current CFL	\$65,000.00
Previous CFL	\$0.00
CFL Adjustment	\$65,000.00
Last CFL Change Date & Time	0001-01-01 16:14:10
Available Balance	\$20,000.00
Cash > Net Accepted & Posted Disbursements	\$45,000.00
Net Accepted & Posted Disbursements	\$0.00
Net Drawdowns	\$45,000.00
Total Unduplicated Recipients	
ACA	\$0.00
Last ACA Payment Date	



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[Person](#)[School](#)[Batch](#)[Award](#)[Reports](#)[User](#)[► School Search](#)[▼ School Information](#)

- [School Summary](#)
- [Financial Aid Contact](#)
- [Eligibility](#)
- [General](#)
- [Options](#)
- [Funding Info](#)
- [Summary Financial Info](#)
- [Refunds of Cash](#)
- [Cash Activity](#)
- [Events](#)
- [Message List](#)
- [Yearly Totals](#)
- [Relationships](#)
- [Balance Confirmation](#)
- [Request Post Deadline](#)
- [Processing](#)
- [Correspondence](#)
- [Report Selection](#)

Cash Activity

[? HELP](#)

SAMPLE UNIVERSITY

Program/Year Selection**Program**

PELL

Award Year

'03-'04

[Printer Friendly](#)**Cash Activity Summary**

Net Draws \$45,000.00
Cash > Accepted & Posted Disbursements & older than 30 days \$45,000.00

	Totals		
Date of Transaction		04/28/2003	03/28/2003
Time		11:01:51 PM	10:28:25 AM
Drawdowns/Payments	\$45,000.00	\$20,000.00	\$15,000.00
Drawdown Adjustments	\$0.00		
Refunds of Cash	\$0.00		
Returns of Cash	\$0.00		
Drawdown Offsets	\$0.00		
Days Since Net Draws Increase		538	569
Days Left For On-time Reporting		000	000
Payment Control Number		20000000000000	1500000000
Accepted & Posted Disbursements Applied	\$0.00	\$0.00	\$0.00
% of Accepted & Posted Disb. Applied to Net Draws	0.0%		
Cash > Accepted & Posted Disbursements	\$45,000.00		
% of Cash > Accepted & Posted Disbursements	100.0%		
Source System		GAPS	GAPS

Amounts in parentheses decrease net draws



Processing Updates





Pell Processing

YTD Totals – as of July 1, 2003

TOTALS

	2002-2003	2003-2004
Originations (#)	5.3 million	197,565
Originations (\$)	\$15.7 billion	\$625.6 million
Actual Disbursements (#)	11.3 million	17,406
Actual Disbursements (\$)	\$11.4 billion	\$20.3 million
% Substantiated	99.91%	N/A
Students in Pell Program	4,763,730	



Pell Processing Update

- Verification Status Incorrect in COD
 - “Blank” status was being rejected for 02-03 and 03-04 awards
 - 02-03 awards are being accepted with the Verification Status of “S”. “S” is not a valid value for this award year
 - For all award years, any adjustment attempts to lower the disbursement amount and update the verification status to “W” are rejecting





Pell Processing Update

- Actual Disbursements Not Displaying Correctly in COD
 - 2002-03 Phase-In actual disbursement batches (#D) are accepted but the Disbursement Release Indicator is displaying “False” on the COD web site instead of “True”





Pell Processing Update

- Current Funding Level (CFL) in COD is Different than GAPS
 - Discrepancies exist between COD CFL & GAPS authorization for some schools. GAPS has implemented a code fix and COD is in the process of cleaning up data





Pell Processing Update

■ Data Corrections

- Major financial code fixes were implemented in April 2003. Issues were localized to 2002- 2003 award year. However, some schools are receiving incorrect payment amounts due to ongoing data clean up
- The COD Summary Financial Information screen is displaying incorrect figures in the Disbursement Amount, Disbursement Adjustment Amount, and Ending Cash Balance fields due to ongoing data clean up
- COD was not sending system generated negative disbursements (such as the type generated by unresolved POP conflicts) to NSLDS on a consistent basis. The code has been fixed; however, COD is still cleaning up affected schools' data





Customer Service





COD Customer Service Statistics

As of July 1, 2003

The COD School Relations Center opened on April 29, 2002. What has happened since?

- Total Inbound Calls to COD School Relations 102,810
- Total Inbound Calls to Applicant Services 20,073
(since March 1, 2003)
- Total Outreach Calls 206,466
- Total Inbound Emails 35,938
- Total Number of COD Website Users 3,830





COD Customer Service Statistics

As of July 1, 2003

Full Participant Schools Processing in COD

- In the 2002-2003, Award Year 22 schools processed as Full Participants
- In the 2003-2004, Award Year 2532 schools are set up to process as Full Participants
- As of June 23rd, 445 schools are actively processing as Full Participants for the 2003-2004 award year

ALL schools must become Full Participants for the 2005-2006 Award Year





COD Customer Service Statistics

As of July 1, 2003

2003-2004 School Testing

- School Testing provides an opportunity to test business processes and software with COD, prior to transmitting and processing production data
- For the 2003-2004 award year:
 - 42 Total Participants in school testing
 - 28 Schools
 - 14 Vendors
- School Testing window closes July 2003





COD Customer Service: Behind the Scenes

- Total of 92 staff at the COD School Relations Center to support Customer Service efforts
- Reference tickets are opened if a CSR can't provide a resolution during the phone call
 - CSRs now have a "Reminder" queue to track all call backs to schools with an open reference ticket
- Calls are tracked on the COD system
 - A memo is recorded for all schools or students who call
 - CSRs also code each contact for trending and tracking
- Communication Techniques
 - COD Processing Updates and COD web site postings
 - Frequently Asked Questions
 - IFAP Communications, P-messages
 - Customer Service Outreach Campaigns





COD Customer Service: Outreach Campaigns

■ Current outreach campaigns for Pell Grants

➤ Disbursement to Drawdown

- Contact is made weekly
- “Reminder” e-mail sent to schools who have not substantiated. These are sent at 20, 30, and 45 days
- At 60 days School Relations phones the schools who remain unsubstantiated

➤ POP

- Contact is made weekly
- School Relations phones schools who have not cleared a POP condition and have recently received a negative disbursement





COD Customer Service: Behind the Scenes

- New IVR and CSR Team Structure
 - Calls distributed by area code
 - Schools will be in more direct contact with their Primary CSR
 - Teams broken down by regions
 - Northeast
 - Southeast
 - Central
 - Mountain/Pacific
 - International (Puerto Rico)
 - Primary CSR's work the same hours as their schools
 - Support Specialists to handle third party software vendors and mainframe schools





How Do I Contact COD School Relations?

- Email CODSupport@acs-inc.com
- Call the COD School Relations Center
 - 1-800-4-P-GRANT for Pell Grants
 - 1-800-848-0978 for Direct Loans
 - Enter option of the desired award year
- COD Web Site (www.cod.ed.gov)





How Do I Obtain Access to the COD Website?

- Submit a Security Administrator Request Letter on school or corporate letterhead
 - Security Administrator is responsible for setting up additional users at your institution
 - Reporting/Attending school relationships in COD will automatically allow access to other school codes
- Refer to announcements on IFAP for detailed instructions and mailing address
 - 6/3/02 - Updated: COD Website Access for Schools
 - 6/3/02 - COD Website Access for Vendors/3rd Party Servicers





Where Can I Get More Information?

- IFAP web site (www.IFAP.ed.gov)
 - Common Origination and Disbursement page
 - Announcements, FAQs, COD Technical Reference
- COD web site (www.cod.ed.gov)
 - Daily Processing Updates
 - School Funding and Processing Information
- Contact COD School Relations





Where Can I Get More Information?

- Software Developer's Conference
 - Arlington, VA – August 14-15, 2003
(<http://edeworkshop.ncspearson.com/swdAugust03.htm>)
- Electronic Access Conferences
 - San Diego – November 2-5, 2003
(<http://edeworkshop.ncspearson.com/SanDiego.htm>)
 - New Orleans – December 2-5, 2003
(<http://edeworkshop.ncspearson.com/NewOrleans.htm>)





Other COD Sessions

- COD and Direct Loan Processing
- COD: The Common Record: An Update on COD and XML





Questions

