



Electronic Access Conference

2002

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Session 24

COD and Direct Loan: Updates to Edits and Record Layouts for 2003-2004

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Session Objectives

- Review edit changes for 2003-2004
- Review new fields for 2003-2004
- Review modified common record tags for 2003-2004



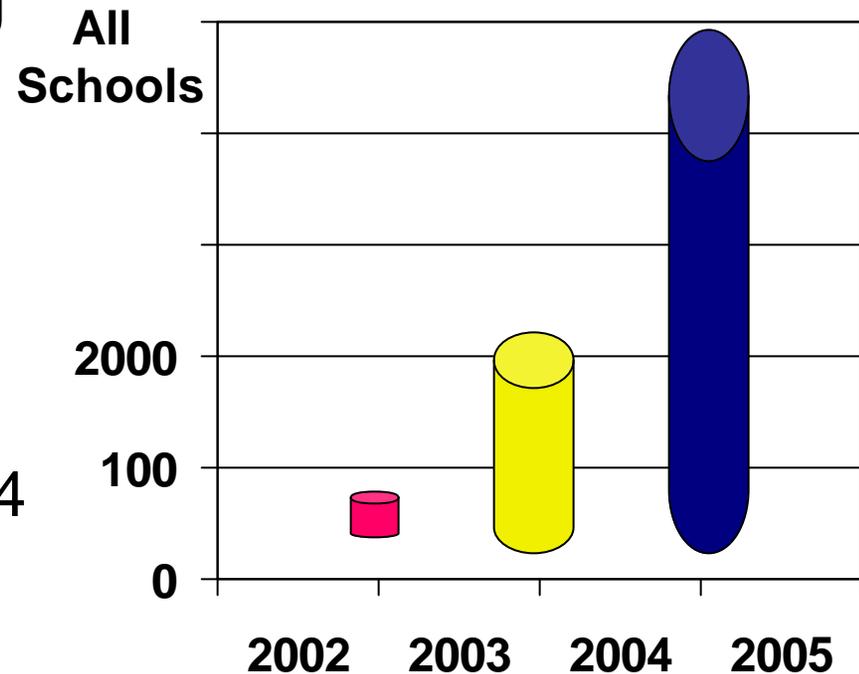
COD Participation

- Your school's "participant" status is determined by the method you use to transmit your data to COD:
 - Full Participants
 - Schools that submit data using the COD Common Record Layout in XML format
 - Phase-In Participants
 - Schools that submit data using Pell Grant/Direct Loan Record Layouts in fixed-length, flat file format



Historical Perspective – Full Participant Schools

- 22 Full-Participant Reporting Schools in AY 02/03
- EDEExpress Users and additional Vendor Software and Custom Software schools become Full-Participant Schools AY 03/04
- ALL SCHOOLS will be Full-Participants by 04/05





New Edits

- Edit 110 (*FP) – Disclosure Statement Warning on “anticipated” disbursements
- Edit 111 (*FP) – Disclosure Statement Warning on “actual” disbursements

**FP = Full Participant*

**PI = Phase In Participant*



New Edits

- Edit 106 (FP*)/T (PI*) – Warning edit for disbursements accepted, but not funded due to missing MPN
- Edit 113 (FP*)/25 (PI*) – PLUS Disbursement Reject (actual disbursements > Endorser Amount)

**FP = Full Participant*

**PI = Phase In Participant*



Record Layout Changes – New Fields

- Endorser Amount – for PLUS loans; the amount a PLUS Endorser has agreed to “guarantee”; sum of actual disbursements cannot exceed this amount
 - **<EndorserAmount>** for **Full Participants**; will be returned on the Common Record Response document for Document Type = CO
 - **Endorser Amount** for **Phase In Participants**; will be returned on the PLUS Credit Decision Override Acknowledgement record



Record Layout Changes – New Fields

- Total Disbursement Amount Accepted – the total amount of disbursement records accepted
 - <TotalFinancialDisbursementAccepted> for **Full Participants only**; will be returned on the Common Record Response document
 - Includes both “anticipated” and “actual” disbursements



Record Layout Changes – New Fields

- Total Funded Disbursement Amount Accepted – the total amount of “actual” disbursement records accepted
 - <TotalFundedDisbursementAccepted> for **Full Participants only**; will be returned on the Common Record Response document
 - Includes only accepted disbursements with Disbursement Release Indicator = True



Record Layout Changes – New Fields

- Total Non-Funded Disbursement Amount Accepted – the total amount of “anticipated” disbursement records accepted
 - <TotalNonFundedDisbursementAccepted> for **Full Participants only**; will be returned on the Common Record Response document
 - Includes only accepted disbursements with Disbursement Release Indicator = False



Record Layout Changes – New Field Values

- Promissory Note Print Code on Common Record (Full Participants only):
 - Added 'V' = COD Reprints and Sends to School
 - Added 'O' = School Prints Onsite and Sends
- Promissory Note Print Indicator on Full Loan Origination Record and for Change Transmit #S083 (Phase-In Participants only):
 - Removed 'O' = Onsite (EDExpress)
 - Added 'V' = COD Reprints and Sends to School
 - Added 'Z' = COD Reprints and Sends to Borrower



Record Layout Changes – New Field Values

- Disclosure Statement Print Code on Common Record (Full Participants only):
 - Added 'S' = School Prints and Provides to Borrower

- Disclosure Statement Print Indicator on Full Loan Origination Record and for Change Transmit #S115 (Phase-In Participants only):
 - Added 'Z' = COD Reprints



Record Layout Changes – New Field Values

■ MPNID

- Added 'N' = PLUS to <MPNID> tag on the Common Record Layout (Full Participants only)
- Added 'N' = PLUS to MPNID field on the MPN Acknowledgement (Phase-In Participants only)



Common Record Tag Name Changes

- Common Record and Schema revised based on work with PESC to meet EBXML standards
- Abbreviations eliminated from all tag names
- Some tag names changed all together



New Common Record Schema

- Full Participants are required to use the new schema for all 03-04 awards
- Full Participants may either continue to use the old schema for 02-03 awards or may switch and use the new schema for both 02-03 and 03-04 awards



2003-2004 COD School Testing

- School Testing Phases:
 - Common Record Manual Verification – February 2003
 - Structured Application Testing – Mar. 2003 – Sept. 2003
- Schools must sign-up in advance to participate in school testing:
 - Contact COD School Relations and request a school testing sign-up sheet (codsupport@acs-inc.com)
- School Testing Guide available on IFAP beginning in January 2003



Who Should Participate in School Testing?

- Software Vendors modifying software to support the XML Common Record are encouraged to test with COD
- Full Participant Schools that use their own software product are encouraged to test with COD
- The EDEExpress product is tested extensively with COD prior to being released to schools; therefore, EDEExpress Users do NOT need to test with COD
- Since most software vendors test with COD on their school's behalf; schools utilizing a software vendor's product do NOT need to test with COD
 - Schools are encouraged to talk to their vendor about test plans and testing results



School Testing Lessons Learned

- Plan to participate in manual verification testing prior to participating in additional testing phases
- Have a good understanding of SAIG On-Line Screen Manager in order to see that files were sent and received correctly
- Allow at least 2 weeks of setup time from sign-up prior to starting testing
- Plan and allow time for issue identification, error resolution and retesting with COD
- Be careful to send test files to the correct mailbox and with the correct testing message classes



How do I become a COD Full Participant?

- Schools must register with COD to become a Full Participant in Award Year 2003-2004
- To register, contact COD School Relations
 - Email **CODSupport@acs-inc.com**
 - Indicate “2003-2004 Full Participant” in Subject Line
 - Call COD School Relations
 - Select Award Year 2002-2003 and express interest to COD CSR
- All EDEExpress Users must register as Full Participants for 2003-2004



How do I obtain access to the COD Web Site?

- 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



How do I contact COD Customer Service?

- Email CODSupport@acs-inc.com
- Call COD School Relations Center
 - 1-800-4-P-GRANT for Pell Grants
 - 1-800-848-0978 for Direct Loans
 - Enter Award Year 2002-2003
- COD Web Site (www.cod.ed.gov)



Where can I get more information?

- IFAP Web Site (www.IFAP.ed.gov)
 - Common Origination and Disbursement page
 - Announcements and FAQs
 - COD Technical Reference
- COD Web Site (www.cod.ed.gov)
 - Daily Processing Updates
 - School Funding and Processing Information
- Contact COD Customer Service



COD Sessions

- Session 19 – Cash Management Overview A-Z
- Session 21 – What's New for Direct Loan Processing in 2003-2004?
- Session 22 – What's New for Pell Grant Processing in 2003-2004?
- Session 23 – COD and Pell Grants: Updates to Edits and Record Layouts for 2003-2004
- Session 24 – COD and Direct Loan: Updates to Edits and Record Layouts for 2003-2004
- Session 25 – Meet the COD Customer Service Team and Get Answers to Your COD Questions



COD Sessions

- Session 26 – COD: Using the New Web Site
- Session 27 – COD Full Participants for 2003-2004
- Session 28 – COD and Direct Loans: Balancing the Books
- Session 29 – COD, Pell, and Direct Loans: Funding for Schools
- Session 58 – Tribally Controlled Colleges: Operating as a Full Participant in the COD environment
- COD Customer Service Staff are available in the PC Lab



Questions

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