



# Software Developers Conference Agenda

November 6, 2003

8:30 a.m. - 8:45 a.m.	Welcome
8:45 a.m. - 9:30 a.m.	Data Strategy
9:30 a.m. - 10:15 a.m.	Common Record Update
10:15 a.m. - 10:45 a.m.	<i>Break</i>
10:45 a.m. - 11:15 a.m.	CPS Update
11:15 a.m. - 12:00 p.m.	COD Update
12:00 p.m. - 12:30 p.m.	Questions and Answers
12:30 p.m. - 12:45 p.m.	Conference Wrap-up



# Data Strategy

- Status Update
- SSIM
- RID
- Technology Strategies



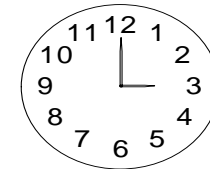
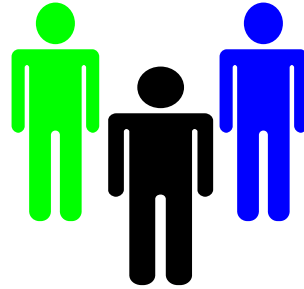
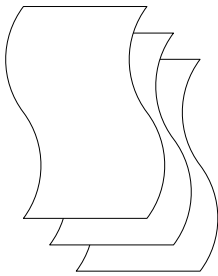
# *Data Strategy Update*

Keith Wilson, Jeanne Saunders,  
Paul Hill, Denise Hill



# Data Strategy Purpose

*The Right Data to the Right People at the Right Time.*



- Consolidation of Data into Shared Source
- Focus on Data Quality

- Trading Partner Enrollment
- Access Management
- Single Sign-Up
- Routing ID (RID)
- Standard Student Identification Method (SSIM)

- Integrated Student View
- Integrated School View
- Foundation for more Timely Updates



# Data Strategy Initiatives

*Data Strategy has evolved into the integration of five core initiatives.*

▪ **Data Framework**

- As-Is and Target State Data Flows
- Quality Assurance and Implementation Plan

▪ **XML Framework**

- XML ISIR
- XML Registry and Repository

▪ **Common Identification**

- Standard Student Identification Method
- Routing ID

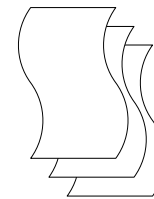
▪ **Trading Partner Enrollment and Access**

- Trading Partner Management
- Enrollment and Access Management

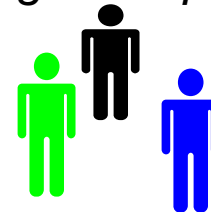
▪ **Technical Strategies**

- External Data Exchange
- Data Storage, Management and Access

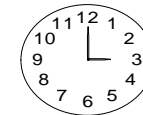
*Right Data*



*Right People*

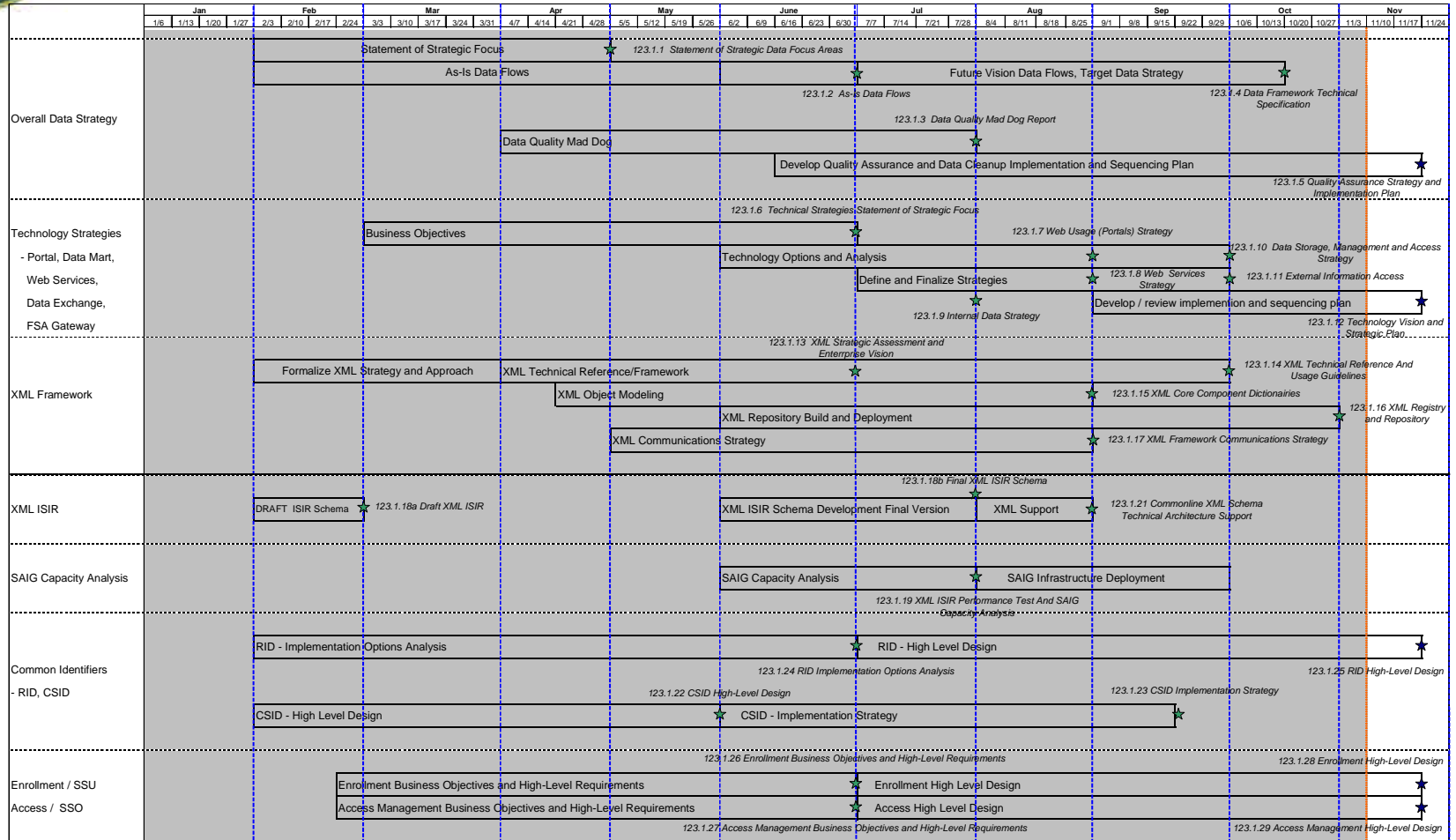


*Right Time*





# Data Strategy Timeline



**Legend**

- ★ Delivered on Schedule
- ★ Scheduled Delivery Date
- ★ Late Delivery



Current Date



# SSIM Recommendations

The recommended SSIM implementation option consists of two stages following a pilot that will allow early realization of the SSIM benefits, but also maintain alignment with the FSA Data Strategy overall vision

## ■ SSIM Pilot

–SSIM logic will be implemented in CPS for renewal FAFSAs only (planned for '04 – '05)

## ■ Stage One - Implement the algorithm at the system level and use centralized routing (Enterprise Application Integration -- EAI) for error handling and change processing

–Individual application's implementation of the matching algorithm option for processing input files from one system to another

–Error handling and correction processing would be implemented through centralized routing (EAI) to allow communication/propagation to systems as determined

–Implementation would begin with the next requirements cycle ('05 – '06) with CPS, NSLDS, and COD as *potential* candidates

## ■ Stage Two – The team will create a picture and high level plan on how to include SSIM in the overall Data Strategy end state vision

–The team will assess how SSIM will fit into the overall Data Strategy vision





# SSIM Next Steps

- Standard Student Identification Method (SSIM)
  - Begin SSIM Pilot on Renewal FAFSAs in CPS
  - Select Stage 1 Participants and Begin Requirements Gathering for the 2005-2006 Software Release
  - Continue to align SSIM with the Data Strategy End State Vision (Stage 2)

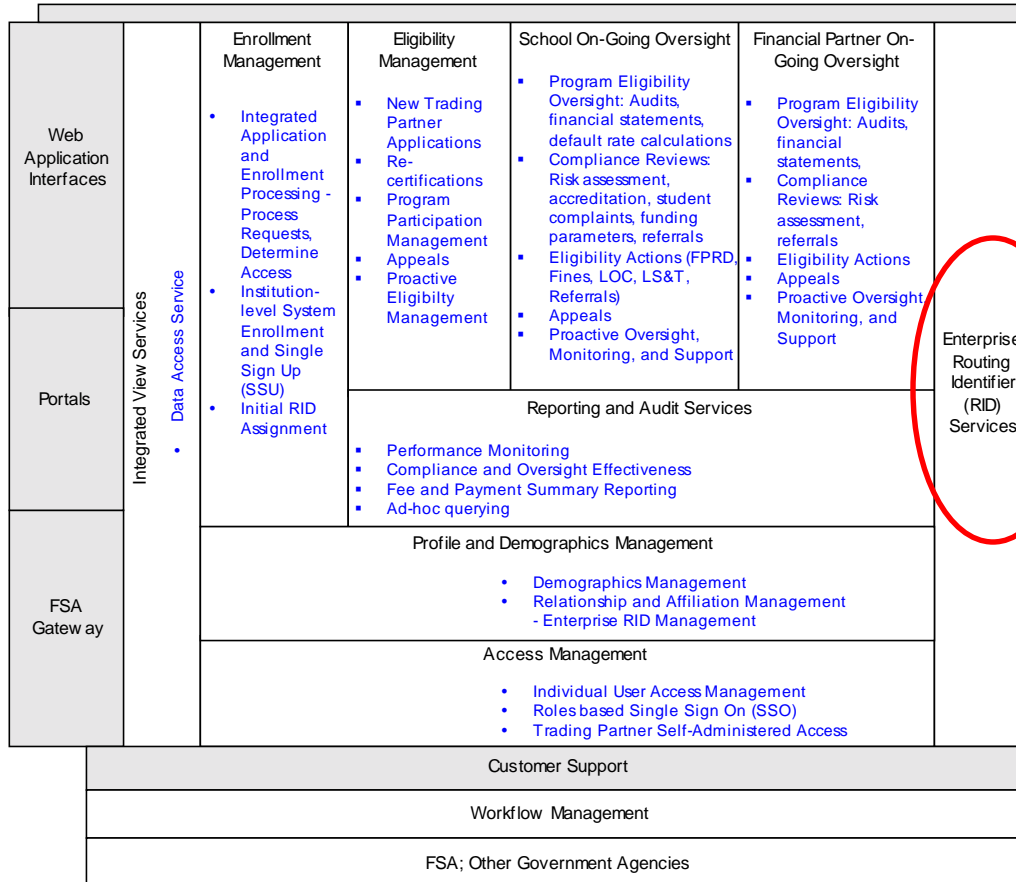





# Routing ID (RID) Solution Recommendation

## Trading Partner Management Framework

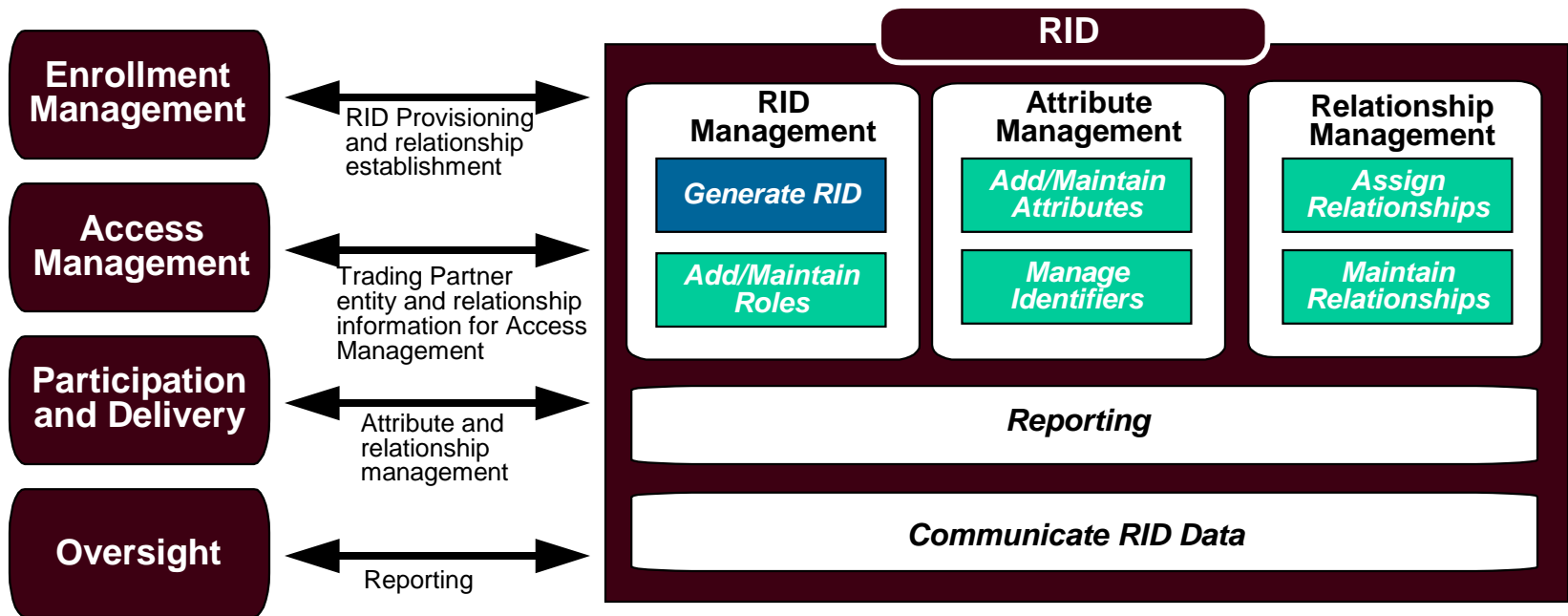
(Schools, Guaranty Agencies, Lenders, Third Party Servicers, State Agencies, Software Developers and Auditors)



 = User Access Points



# Routing ID (RID) Functional Components





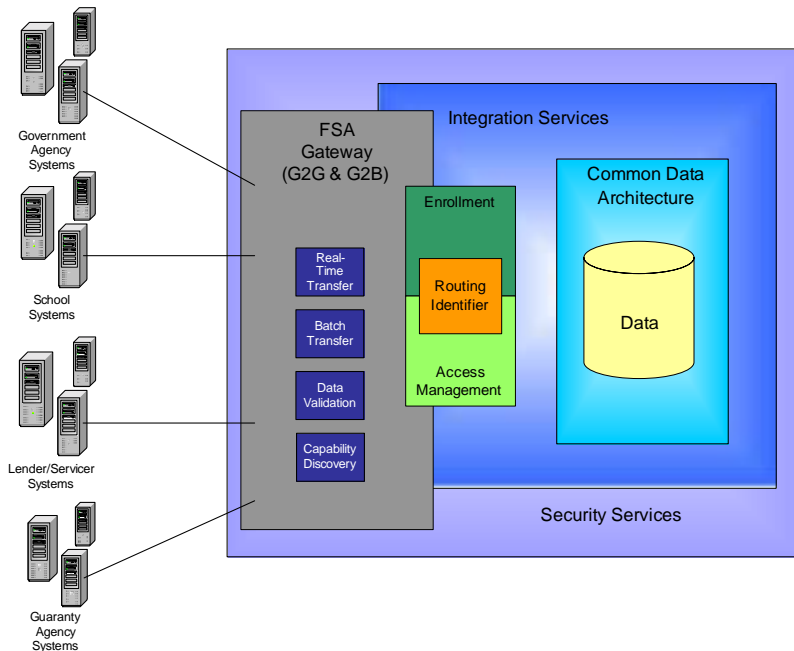
# RID Next Steps

- Routing ID (RID)
  - Complete High-Level Solution Design
  - Gather Requirements for the TPMS
  - Determine Roll-out the TPMS
    - Group Related Business Processes
    - Coincide with New Development Year
  - Conduct Focus Groups to Obtain Feedback



# Technology Strategies: FSA Gateway

Trading Partners

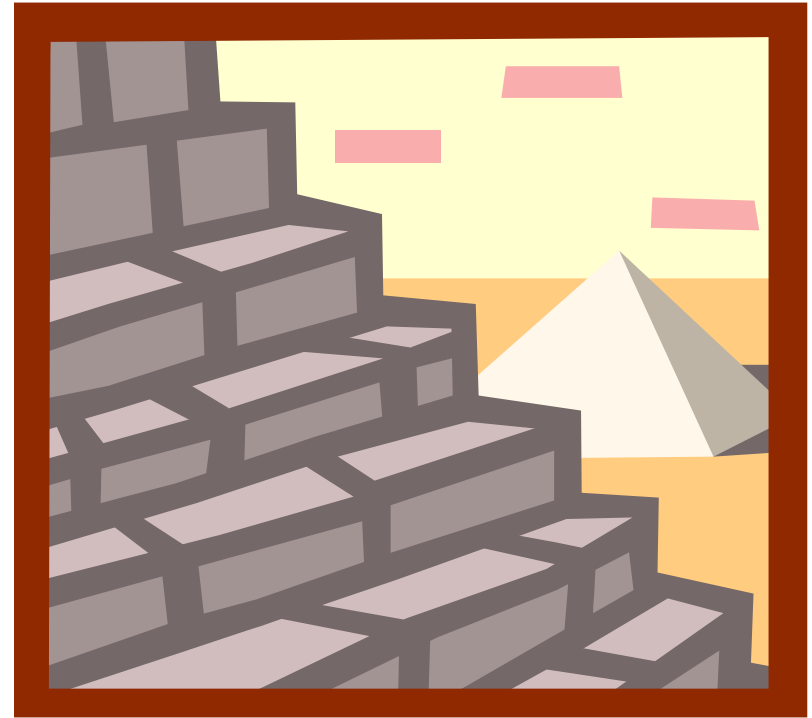


- Provide right-time access to FSA data and business functions
- Leverage standard data formats in data exchange
- Use common data definitions for data exchange and validation
- Integrate with existing FSA capabilities and other initiatives
- Incorporate with Trading Partner Management and security efforts to enable uniform communication between FSA and trading partners



# Data Strategy Next Steps

- Market Research
- Continued Data Strategy Work





# Thank You!

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# *Common Record Update*

Holly A. Hyland, FSA  
Kim Shiflette, NCHELP





# Common Record Update

## Agenda

ISIR

COD

XML Framework

CR:C



# *CommonRecord: CommonLine Industry Update*

Kim Shiflette - NCHELP  
CRC Co-Chair



# What is Common Record: CommonLine (CRC)

- CommonLine Converging and  
Aligning with the Common Record
  - COD standards with the flexibility of  
FFELP
  - Supports all functionality available in  
CommonLine Release 5



# The Common Record for FFELP & Alternative Loans

- Designed to meet the needs of
  - Schools
  - SIS Vendors
- Designed in collaborative manner
  - Schools and SIS Vendors
  - FSA and PESC (Postsecondary Electronic Standards Council)
  - Lenders, Guarantors and Service Providers



# The Common Record for FFELP & Alternative Loans

- Loan Origination and Disbursement Processing
  - New Structure
  - New Names
  - Same Business Process



# The Common Record for FFELP & Alternative Loans

- Change Processing
  - New Structure
  - New Names
  - New Business Process “End Result”



# The Common Record for FFELP & Alternative Loans

- In General
  - All records sent in a single file
  - Pre and Post guaranty changes can now be sent together
  - Student Centric
  - Support of real time functionality in an XML based record





# Progress Report

- July - CRC Implementation Guide Version 1.0 and Schema Published
  - Version 1.01, 1.02, etc.
- Document Refreshed on Monthly Basis
  - issues, clarifications, etc.
- Schemas Republished as Needed
  - issues, clarifications, etc.



# Progress Report

- Testing Tool - January 2004
- Training - Three sessions
  - October: Midwest
  - January: Jacksonville, FL 29th and 30th
  - February: Phoenix, AZ - 23rd and 24th
- CRC Transport - Developing Standard



# Industry Implementation

- January 2004 - Testing Begins
- April 2004 - Implementation Begins
- Industry Implementation Schedule
  - A few looking at Spring 2004
  - 1/2 Fall 2004
  - Remainder 2005/2006
  - Phased and full implementation



# Information

## **NCHELP - Electronic Standards Committee Page:**

[http://www.nchelp.org/committees/e\\_standards/CommonRecordCommonLine.htm](http://www.nchelp.org/committees/e_standards/CommonRecordCommonLine.htm)

- Documentation and Tracking Documents
- Issue Submission
- Schemas
- Instance Documents



# 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 Estimated Implementation Schedule



**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





# XML Strategic Assessment and Enterprise Vision

- History of FSA and Community Collaborative Effort
- FSA Current State
- Best Practices – Case Studies
- Future State – XML Maturity Model
  
- Not an FSA XML System Sequence Plan



# Common Record: ISIR

- Draft Schema
  - Currently published
  - <http://ifap.ed.gov/eannouncements/0304XMLISIRSchema.html>
- Second Draft
  - Second release in December
  - Conforms to community standard



# XML Technical Reference and Usage Guidelines

- Introduction to XML
- XML Schema Design Best Practices
- XML Schema Object Management
  - Classification of Objects
  - Versioning of Objects
- XML Schema Design Patterns
- XML Schema Development Methodology



# XML ISIR Performance Test and SAIG Capacity Plan

- Introduction
  - Business Objectives
- Performance Test Process
- Performance Test Results



# XML Core Components Dictionaries

- Introduction to Core Components
  - Business Objectives
- Functional Description
- Detailed Description



# XML Core Components Dictionaries

- Over 500 Components
- Under FSA Business Review
- Next steps includes comparing with PESC Core Components Dictionary
- Will be released for Public Use



# XML Registry and Repository

- Based on a tools analysis, FSA has developed a custom solution; however, it is organized to easily move to an OTS product as tools mature.
- The custom-developed XML Registry and Repository will be a Web-based application that consists of Java Server Pages (JSPs) and Servlets that access an Oracle database. In order to provide support for the ebXML standard, the database structure will be based on OASIS's ebXML specifications for Registry and Repository v. 2.5.





# ebXML Registry and Repository Specifications

The Oasis ebXML Registry Technical Committee has released the following two documents which together form the complete specifications for an ebXML Registry. Both these specifications should be adhered to in order for a Registry to be fully ebXML compliant.

- **ebXML Registry Information Model Specification 2.5** defines the types of metadata stored in the Registry and the relationships among the various metadata classes.
- **ebXML Registry Services Specification 2.5** defines the services the Registry should provide to the users and the protocols that must be supported by the Registry.



# Community XML Technical Architecture Support

- CommonRecord: CommonLine Schema Support
- PESC XML Forum Support
- College Transcript Support



# Welcome


## XML Registry

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WELCOME TO THE FSA XML REGISTRY AND REPOSITORY.



**FSA XML  
REGISTRY/REPOSITORY**

**WELCOME**

This tool provides a central access point for FSA's XML Core Components, XML Schemas, and supporting documentation.

Users can access the XML Registry and Repository to search, view, upload, and download the XML Core Component definitions and documentation.

Registered Users (Update Access): [Click Here](#)

Guest Users (Read-Only Access): [Click Here](#)



# Core Component View - Base

**FSA FEDERAL STUDENT AID** XML Registry  
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[Registry](#) [Users](#) [Info](#) [Log Out](#)

**CLASSIFICATIONS**  
**CORE COMPONENTS**  
SECTOR LIBRARIES  
MESSAGE SPECIFICATIONS  
SEARCH

**FSA CORE COMPONENTS**

- Aid**
  - DISBURSEMENTS
    - CORE COMPONENTS
    - ENHANCED LISTS
  - LOANS AND GRANTS
    - CORE COMPONENTS
    - ENHANCED LISTS
- DOCUMENT**
  - CORE COMPONENTS
  - ENHANCED LISTS
- ENTITY**
  - ADDRESS AND CONTACT
    - CORE COMPONENTS
    - ENHANCED LISTS
- FINANCIAL PARTNER (FP)**
  - DISBURSEMENTS
    - CORE COMPONENTS
    - ENHANCED LISTS
- IDENTIFICATION**
  - CORE COMPONENTS
  - ENHANCED LISTS
- PARTICIPATION**
  - CORE COMPONENTS
  - ENHANCED LISTS

**CORE COMPONENT: INSTITUTION'S CURRENT ID FOR AWARD DISBURSEMENT**

[BASE PROPERTIES](#) | [DETAILS](#) | [ASSOCIATIONS](#) |

[Update this Core Component](#)

Business Term:	Institution's Current ID for award disbursement	
Definition:	This basic component identifies the Institution's Current ID for award disbursement	
Related Terms:		
Classification:	/ Aid / Disbursements /	
Namespace Identifier:	urn:us:gov:ed:fsa:aid:disbursement:	
Version:	1.0.0	
Object:	Qualifier	Property Award Institution ID
Property:	Qualifier	Property Current ID
XML Data Type:	token	
Core Component Data Type:	IdentifierType	
XML Tag Name:	CurrentID	
Status:	Submitted	
Stability:	Static	



# Core Component View - Details

FSA FEDERAL STUDENT AID XML Registry

Registry Users Info Log Out

CLASSIFICATION  
CORE COMPONENTS  
SECTOR LIBRARIES  
MESSAGE SPECIFICATIONS  
SEARCH

FSX Core Components

- Ann
  - Dissemination
    - Core Components
      - Enumerated Lists
  - Lower and Covert
    - Core Components
      - Enumerated Lists
- Document
  - Core Components
    - Enumerated Lists
- Entity
  - Address and Contact
    - Core Components
      - Enumerated Lists
- Financial Parties (FP)
  - Dissemination
    - Core Components
      - Enumerated Lists
  - Identification
    - Core Components
      - Enumerated Lists
  - Participation
    - Core Components
      - Enumerated Lists
- Section
  - Dissemination
    - Core Components
      - Enumerated Lists
  - Identification
    - Core Components
      - Enumerated Lists
  - Participation
    - Core Components
      - Enumerated Lists

CORE COMPONENT: INSTITUTION'S CURRENT ID FOR AWARD DISBURSEMENT

Date Properties | Details | Associations

Facets

Facet Type	Facet Value
length	10
minLength	
maxLength	
pattern	
enumeration	

Supplementary Fields

Field Name	Field Value
schemaID	
schemaname	
schemever	
schemaAgencyID	
schemaAgencyName	
schemaAgencySchemeID	
schemaAgencySchemeAgencyID	
schemaDataURI	
schemaURI	

XML Schema Definition

```
<!-- ===== CORE COMPONENT: CurrentIDType ===== -->
<xs:complexType name="CurrentIDType">
  <xs:simpleContent>
    <xs:restriction base="IdentifierType">
      <xs:length value="10"/>
    </xs:restriction>
  </xs:simpleContent>
</xs:complexType>
```





# Core Component View -

**FSA** FEDERAL STUDENT AID  
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XML Registry

Registry | Users | Info | Log Out

CLASSIFICATIONS  
**CORE COMPONENTS**  
SECTOR LIBRARIES  
MESSAGE SPECIFICATIONS  
SEARCH

FSA CORE COMPONENTS  
Aid  
DISBURSEMENTS  
CORE COMPONENTS  
ENUMERATED LISTS  
LOANS AND GRANTS  
CORE COMPONENTS  
ENUMERATED LISTS  
DOCUMENT  
CORE COMPONENTS  
ENUMERATED LISTS  
ENTITY  
ADDRESS AND CONTACT  
CORE COMPONENTS  
ENUMERATED LISTS  
FINANCIAL PARTNER (FP)  
DEMOGRAPHICS  
CORE COMPONENTS  
ENUMERATED LISTS  
IDENTIFICATION

**CORE COMPONENT: INSTITUTION'S CURRENT ID FOR AWARD DISBURSEMENT**

BASE PROPERTIES | DETAILS | **ASSOCIATIONS**

Child Associations

These are the child elements of this Core Component.

Associated Object	Business Term	Min	Max	Association Type
There are no child associations for this Core Component.				

Parent Associations

These are other Core Components that have this Core Component as a child element.

Associated Object	Business Term	Min	Max	Association Type
AwardInstitutionID	Institution's ID for award disbursement	1	1	ContainsCCObject



# Message Specification - View

**FSA** FEDERAL STUDENT AID  
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[Registry](#) [Info](#)



[CLASSIFICATIONS](#)  
[CORE COMPONENTS](#)  
[SECTOR LIBRARIES](#)  
[MESSAGE SPECIFICATIONS](#)  
[SEARCH](#)

**FSA MESSAGE SPECIFICATIONS**

- [Aid APPLICATION](#)
- [Aid Award](#)
- [Aid AWARDSSES](#)
- [INSTITUTION PARTICIPATION](#)
- [SERVICING](#)

**MESSAGE SPECIFICATION: COMMONRECORD**

[Download](#)

Name:	CommonRecord
Namespace Identifier:	urn:us:gov:ed:fsa:award:COD2.0c
User Version:	2.0c
Expiration Date:	
Description:	This is the External Common Record for COD. It is used to submit Awards and Disbursements for Pell Grants and Stafford Direct Loans.
Status:	Approved
Stability:	Static







# Message Specification - Download

**FSA FEDERAL STUDENT AID** XML Registry

We Help Put America Through School

Registry Info

CLASSIFICATIONS  
CORE COMPONENTS  
SECTOR LIBRARIES  
**MESSAGE SPECIFICATIONS**  
SEARCH

FSA MESSAGE SPECIFICATIONS

- ADD APPLICATION
- ADD AWARD
- ADD AWARDNESS
- INSTITUTION PARTICIPATION
- SERVICES

**MESSAGE SPECIFICATION: COMMONRECORD**

Download

Name: CommonRecord  
Namespace Identifier: urn:us:gov:ed:fsa:award:COD2.0c  
User Version: 2.0c  
Expiration Date:  
Description:  
Status:  
Stability:

**File Download**

Some files can harm your computer. If the file information below looks suspicious, or you do not fully trust the source, do not open or save this file.

File name: CommonRecord2[1].0c.xsd  
File type: XML Schema  
From: fsaxmlregistry.ed.gov

Would you like to open the file or save it to your computer?

Open Save Cancel More Info

Always ask before opening this type of file

# Search



**FSA** FEDERAL STUDENT AID

*We Help Put America Through School*

XML Registry

[Registry](#) [Info](#)



- CLASSIFICATIONS
- CORE COMPONENTS
- SECTOR LIBRARIES
- MESSAGE SPECIFICATIONS
- SEARCH**

SEARCH

Please enter keyword(s) and select search criteria.

Search |

Search Text:	<input type="text"/>
Search For:	<a href="#">Select All</a>
<input checked="" type="checkbox"/> Core Components	
<input checked="" type="checkbox"/> Enumerated Lists	
<input checked="" type="checkbox"/> Sector Libraries	
<input checked="" type="checkbox"/> Message Specifications	
Search On:	<a href="#">Select All</a>
<input checked="" type="checkbox"/> Name	<input checked="" type="checkbox"/> Description
<input checked="" type="checkbox"/> Tag Name	<input checked="" type="checkbox"/> Related Term
<input checked="" type="checkbox"/> Business Term	<input checked="" type="checkbox"/> Qualifier Representation Term
<input checked="" type="checkbox"/> Object Class Term	<input checked="" type="checkbox"/> Qualifier Object Class
<input checked="" type="checkbox"/> Property Term	<input checked="" type="checkbox"/> Qualifier Property Term



# Core Component - Update

**FSA FEDERAL STUDENT AID** XML Registry

[Registry](#) | [Users](#) | [Info](#) | [Log Out](#)

**CLASSIFICATION**  
[CORE COMPONENTS](#)  
[SECTOR LIBRARIES](#)  
[MESSAGE SPECIFICATIONS](#)  
[SEARCH](#)

**FSA CORE COMPONENTS**

- Aid**
  - DISBURSEMENTS
    - CORE COMPONENTS
    - DELEGATED LISTS
  - LOANS AND GRANTS
    - CORE COMPONENTS
    - DELEGATED LISTS
  - DOCUMENT
    - CORE COMPONENTS
    - DELEGATED LISTS
  - ENTITY
    - ADDRESS AND CONTACT
      - CORE COMPONENTS
      - DELEGATED LISTS
    - FINANCIAL FACTOR
      - DEMOGRAPHIC
        - CORE COMPONENTS
        - DELEGATED LISTS
      - IDENTIFICATION
        - CORE COMPONENTS
        - DELEGATED LISTS
      - PARTICIPATION
        - CORE COMPONENTS
        - DELEGATED LISTS
    - PERSON
      - DEMOGRAPHIC

**CORE COMPONENT: INSTITUTION'S ID FOR AWARD DISBURSEMENT**

[Basic Properties](#) | [Details](#) | [Associations](#)

[Save](#) | [Cancel](#)

Business Term:	Institution's ID for award disbursement	
Definition:	This complex component provides a logical grouping of components used to identify an Institution for award disbursement.	
Related Terms:		
Classification:	/ Aid / Disbursements /	
Namespace Identifier:	urn:us:gov:ed:fsa:aid:disbursement:	
Version:	1.0.0	
Object:	Qualifier	Object Class Award Institution ID
Property:	Qualifier	Property Term
XML Base Data Type:	N/A	
Core Component Data Type:	Aggregate	
XML Tag Name:	AwardInstitutionID	
Status:	Submitted	
Created:	On: [Date]	



# Core Component - Add

**FSA FEDERAL STUDENT AID XML Registry**  
The Help That America Needs Through School

Registry Users Info Log Out

**CLASSIFICATIONS**  
CORE COMPONENTS  
SECTOR LIBRARIES  
MESSAGE SPECIFICATIONS  
SEARCH

**FSA Core Components**

- Am
  - Disbursement
    - CORE COMPONENTS
    - GENERATED LISTS
  - Loans and Grants
    - CORE COMPONENTS
    - GENERATED LISTS
- Document
  - CORE COMPONENTS
  - GENERATED LISTS
- Entity
  - ADDRESS AND CONTACT
    - CORE COMPONENTS
    - GENERATED LISTS
  - FINANCIAL PARTNER
    - Demographics
      - CORE COMPONENTS
      - GENERATED LISTS
    - IDENTIFICATION
      - CORE COMPONENTS
      - GENERATED LISTS
    - PARTICIPATION
      - CORE COMPONENTS
      - GENERATED LISTS
  - Person
    - Demographics

**CORE COMPONENT:**

BASE PROPERTIES | DETAILS | ASSOCIATIONS

Save | Cancel

Business Term:	<input type="text"/>
Definition:	<input type="text"/>
Related Terms:	<input type="text"/>
Classification:	urn:uuid:eeeca46b-fbb-4eba-b96d-90df2fc86a76
Namespace Identifier:	
Version:	0.0.0
Object:	Qualifier <input type="text"/> Object Class <input type="text"/>
Property:	Qualifier <input type="text"/> Property Term <input type="text"/>
XML Base Data Type:	
Core Component Data Type:	Select a Type
XML Tag Name:	<input type="text"/>
Status:	Submitted
Created:	Now



# Questions and Answers

We appreciate your feedback and comments.  
We can be reached at:

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# *CPS Update*

Teri Hunt



# ISIR Datamart

- ISIR Datamart will be implemented on Jan. 2, 2004
- Will store 2004-05 ISIR data for retrieval and distribution to authorized users
- New feature in FAA Access to CPS Online allows users to request ISIRs from Datamart





# ISIR Datamart cont.

- Options for receiving ISIRs --
  - Daily
  - By request
- Sign up through Participation Management System
  - Default is daily receipt (like current system)
  - May change option at any time
  - Users who select daily receipt can also use Datamart to request ISIRs



## ISIR Datamart cont.

- As queries run against Datamart, files of requested ISIRs generated
- Files loaded to SAIG under separate message class
- Files of requested ISIRs must be retrieved within 14 calendar days



## ISIR Datamart cont.

- Certain ISIRs automatically “pushed” regardless of option selected by institution
  - EFC changes
  - SAR C Code changes
  - System-generated transactions –
    - NSLDS post-screening
    - DHS automated secondary confirmation
    - Reprocessing



# ISIR Message Classes

- Current ISIR message classes will be replaced with new message classes to reflect implementation of ISIR Datamart
- Message classes will identify types of ISIRs
  - Daily ISIRs
  - Requested ISIRs
  - CPS Pushed ISIRs
  - Errors



# ISIR Message Classes cont.

- Daily ISIRS
  - ISIRs automatically sent to destination points after each day's processing
    - IDAP05OP – Application submitted by the school (EAPS)
    - IDCO05OP – Correction submitted by the school (CORR)
    - IDSA05OP – School listed on record (SARA)
    - IDRE05OP – State Agency residents (ESFR)
    - IDNR05OP – State Agency non-residents (ESFN)



# ISIR Message Classes cont.

- Requested ISIRS
  - ISIRs sent to destination points as a result of a request from the ISIR Datamart
    - ISRF05OP



# ISIR Message Classes cont.

## ■ Pushed ISIRS

- ISIRs automatically “pushed” to destination points after each day’s processing regardless of option selected
  - IGCO05OP – Correction submitted by the school (CORR)
  - IGSA05OP – School listed on record (SARA and SYSG)
  - IGRE05OP – State Agency residents (ESFR)
  - IGNR05OP – State Agency non-residents (ESFN)





# EDE Technical Reference

- Available at [www.fsadownload.ed.gov](http://www.fsadownload.ed.gov)
- Select References and Documentation
- Select 2004-2005 under Electronic Data Exchange Technical Reference



# Specifications

- Software Developer Specifications (NAS Specifications) – draft posted to IFAP and FSA Download in early September
- Updates will be made as needed – most likely in November



# CPS Test System

- Available November 24, 2003 through end of processing cycle
- User Guide will be posted to IFAP in early November
- Message will be issued when test system goes live for your testing



## CPS Test System cont.

- Test files will be available in mid-November
- Separate input and output files will be posted for testing specifications
- Remember - CPS is still in test until SFA accepts system and production starts on January 2, 2004



# Technical Assistance

We appreciate your feedback and comments.

Phone: 1-800-330-5947

Email: [cpswan@ncs.com](mailto:cpswan@ncs.com)



# COD Update



# Agenda

- 2004-2005 Message Class Update
- 2004-2005 SAIG Transmission Header Changes
- School Testing
- Software Developer Feedback





# 2004-2005 Message Class Options

- Full Participants will be able to choose the message class in which they send and receive documents to and from the COD System.
- Message class options will include the following:
  - Non-program specific and non-award year specific
  - Non-program specific and award year specific
  - Program specific and non-award year specific
  - Program specific and award year specific
- Each system generated Doc Type will have its own message class.
- Message class options apply to the 2004-2005 award year only.



# 2004-2005 Message Class Options

- Some of the message class names presented at the last conference have been modified to include a more user-friendly naming convention.

## YEAR SPECIFIC

OLD NAME	NEW NAME
CRAA05IN	No change
CRAR05OP	CRAA05OP
CRPA05IN	CRPG05IN
CRPA05OP	CRPG05OP
CRDA05IN	CRDL05IN
CRDA05OP	CRDL05OP
CRCB05IN	No change
CRCA05OP	CRCB05OP

## NON-YEAR SPECIFIC

OLD NAME	NEW NAME
COMRECIN	No change
COMRECOP	No change
CRPAMYIN	CRPGMYIN
CRPRMYOP	CRPGMYOP
CRDAMYIN	CRDLMYIN
CRDRMYOP	CRDLMYOP
CRCAMYIN	CRCBMYIN
CRCRMYOP	CRCBMYOP

- See the 2004-2005 COD Technical Reference November release for more information.



# SAIG Transmission Header

- SAIG has increased the variable BAT= field on the SAIG Transmission Header (N\*05/N\*95) from 26 to 50 characters.
- Beginning in March 2004, COD will reserve the first 20 characters of this field for school use and populate the last 30 characters with the Batch/Document ID on response/acknowledgements for *all* award years.
- If a school uses the last 30 characters for other data on the incoming record, COD will overwrite this data with the Document ID or the Batch ID.
- EDConnect users must upgrade to EDConnect version 5.3 or higher in order for their records not to reject.



# School Testing



# Agenda

- COD School Testing
- School Testing Documentation
- School Testing Timeline
- School Testing Process
- Lessons Learned



# 2004-2005 COD School Testing

## ■ Purpose:

- Provide schools, third-party servicers, and software vendors an opportunity to test business processes and system software in a low-volume, controlled test environment enabling simpler, faster, and less costly issue identification and resolution
- Ease the transmission of production data
- Reduce the risk of production problems

## ■ School Testing Documentation:

- School Testing Guide
- Test Cases for both Full and Phase-In Participants
- COD 2004-2005 Technical Reference available on IFAP and FSA Download



# 2004-2005 COD School Testing Timeline

Phase	Dates
Sign-up	Dec. 1, 2003 – May 1, 2004
Phase I-Manual Verification Testing	Jan. 1, 2004 – May 31, 2004
Phase II-Structured Application Testing	Mid-March 2004 - June 30, 2004





# School Testing Process

## 1. Sign-up

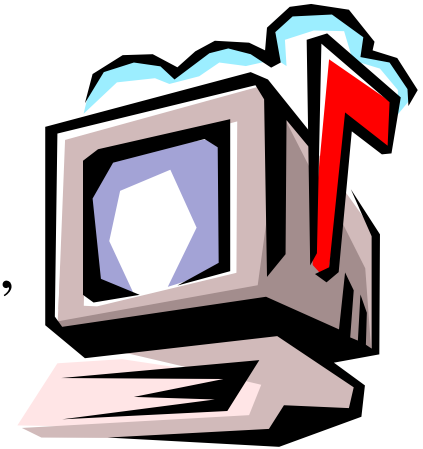
- Sign-up document is included in 2004-2005 Technical Reference Section VII and posted on COD web site
- Submit sign-up document to COD School Relations Center via email or fax





# School Testing Process

2. Receive confirmation email from COD School Relations Testing Team that contains:
  - Testing coordinator contact information,
  - Scheduled start date to submit files,
  - What you should expect during your testing experience.





# School Testing Process

## 3. Submit test files

### ➤ Phase I Manual Verification

- The COD team manually reviews Common Record document emailed to the COD School Relations Center:
  1. Verifies schema version,
  2. Identifies any potential updates to the Common Record.



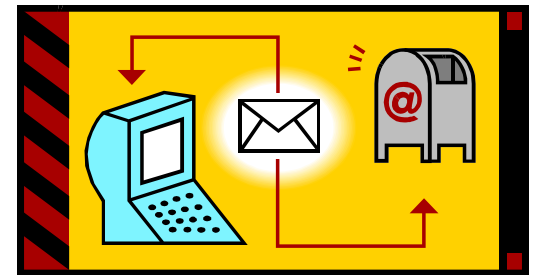


# School Testing Process

## 3. Submit test files

### ➤ Phase II Structured Application Testing by sending files via SAIG.

- Ensures schools can send, receive, and process batches of records using detailed input instructions.
- Assists in the identification of potential updates to your system before beginning actual processing



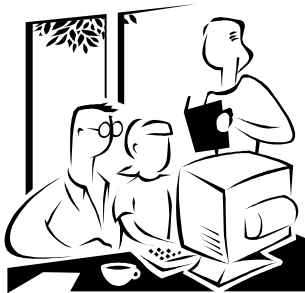


# School Testing Process

## 3. Submit test files

➤ Assistance provided by COD School Testing Team.

- Clarification of 2004-2005 COD Technical Reference,
- Scheduling of test dates,
- Assist with issue identification and resolution,
- Process submitted data,
- Provide testing technical guidance.

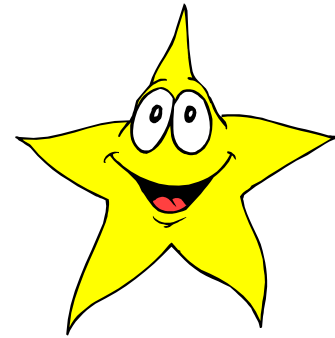




# School Testing Process

## 4. Receive assistance monitoring 1<sup>st</sup> “live” batch

- The School Testing team will watch for submission of the first batch into the COD Production environment.
- After a batch has successfully processed, the School Testing team will turn you back to your primary representative.

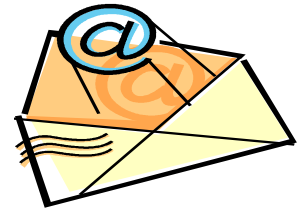






# School Testing Process

## 5. Solicit Feedback



- During testing, school questions and recommendations are recorded.
- After completion, an email is sent to participants asking for feedback on School Testing process and experience.
- COD School Relations School Testing team also provides feedback.







# 2003-2004 Lessons Learned



Recommendation	Implemented
More communication to the community about School Testing and the signup process	COD will communicate using IFAP, COD Processing Updates, Web Messages, and Conference Presentations
Detailed explanation of the Routing ID for Full Participants	Added to 2004-2005 School Testing Guide
Clarification of fields located on the Sign-up Document	Added to 2004-2005 School Testing Guide



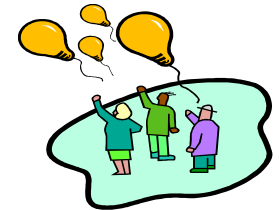
# 2003-2004 Lessons Learned



Recommendation	Implemented
Discontinue Bulletin Board due to lack of interest from School Testing community	Bulletin Board was discontinued
Enhanced explanation of ISIR files	Added to 2004-2005 School Testing Guide
Speed up set-up process for testing after Sign-up Document is received	COD School Relations is reviewing the set-up process for areas of improvement



# 2003-2004 Lessons Learned



Recommendation	Implemented
Allow for additional testing after COD Testing Cycle is completed	Being investigated to see if possible for 2004-2005 School Testing
Provide sample Pell and Direct Loan origination files and the corresponding Pell acknowledgement files	Being investigated to see if possible for 2004-2005 School Testing
Provide testing environment that mimics the COD System and is available year round for testing with testing scenarios	Being investigated to see if possible for 2004-2005 School Testing



# Software Developer Feedback



# Contact Us!!

- Presenters: Rosemary Beavers      Cheryl Markiewicz  
                  Jim McMahon                Lori Clemmensen  
                  Mike Murray
- Email: [CODSupport@acs-inc.com](mailto:CODSupport@acs-inc.com)
- Call the COD School Relations Center
  - 1-800-4-PGRANT for Pell Grants
  - 1-800-848-0978 for Direct Loans
- COD Web Site ([www.cod.ed.gov](http://www.cod.ed.gov))

