

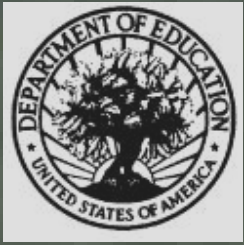
Software Developers Conference August 11, 2005

Agenda

- 9:00 am – 9:05 am** **Welcome and Opening Remarks**
Jerry Schubert
- 9:05 am – 10:05 am** **ADvance Update**
Jim McMahon and Renee Wade
- 10:05 am – 10:35 am** **NSLDS Update**
Ron Bennett
- 10:35 am – 11:00 am** **Break**
- 11:00 am – 12:00 pm** **COD and CPS Processing Updates**
Mike Murray and Marilyn LeBlanc
- 12:00pm – 12:30 pm** **XML**
Tim Bornholtz
- 12:30 pm – 1:00 pm** **Questions and Answers**
Wrap-up
Jerry Schubert

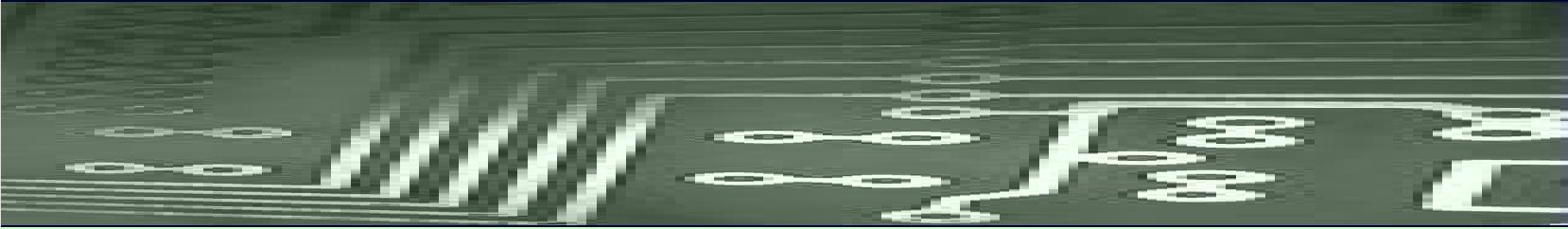


**Sheraton National Hotel
Arlington, Virginia**



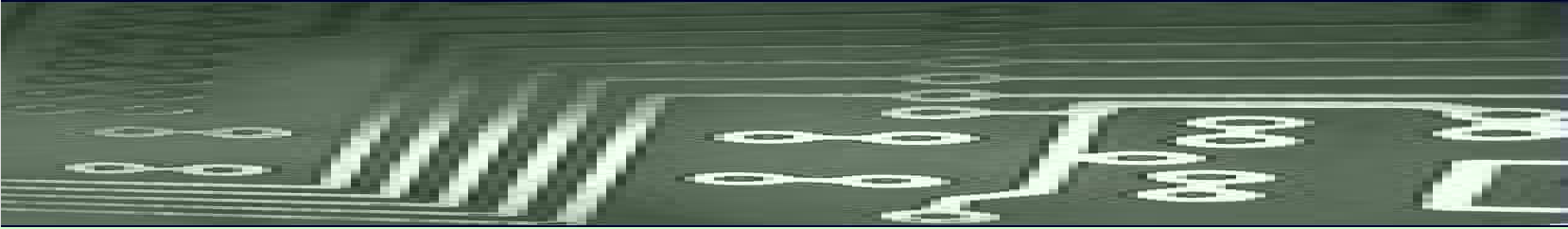
August 11, 2005

Software Developers Conference



Agenda

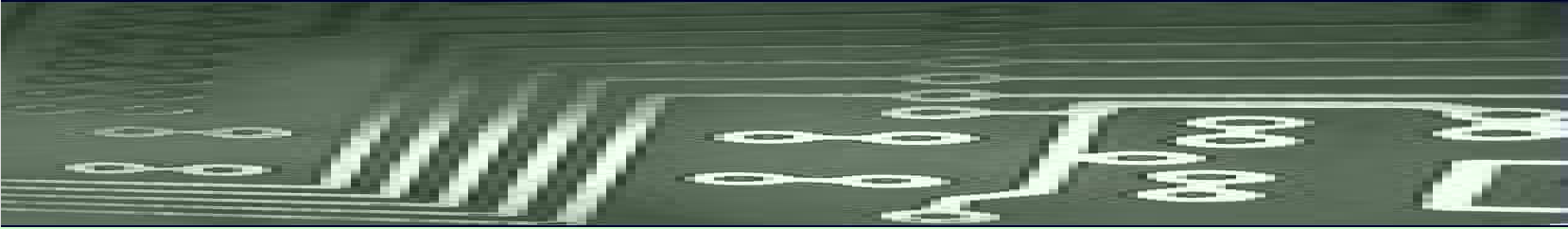
- | | |
|----------------------------|---|
| 9:00 am – 9:05 am | Welcome and Opening Remarks
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| 10:05 am – 10:35 am | NSLDS Update
Ron Bennett |
| 10:35 am – 11:00 am | Break |
| 11:00 am – 12:00 pm | Common Origination and Disbursement (COD) and Central Processing System (CPS)
Updates
Mike Murray and Marilyn LeBlanc |
| 12:00pm – 12:30 pm | XML
Tim Bornholtz |
| 12:30 pm – 1:00 pm | Questions and Answers
Wrap-up
Jerry Schubert |



Welcome

Jerry Schubert

Chief Information Officer



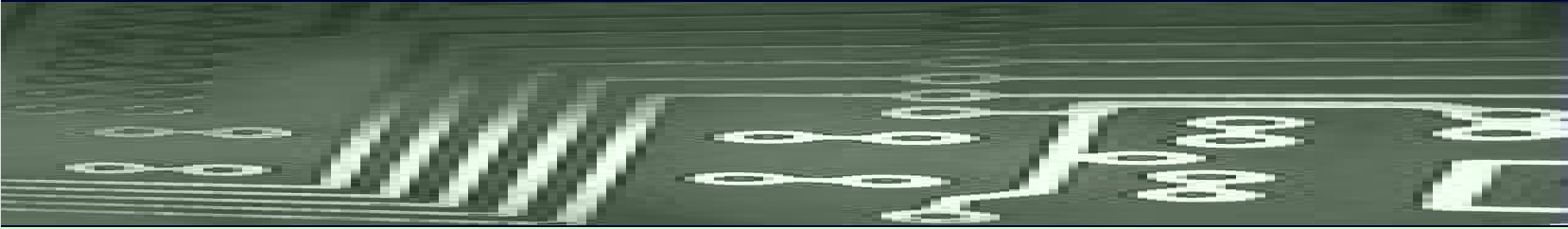
FSA Software Developers Liaison

- FSA is changing your liaison:
 - From Holly Hyland
 - To Tim Bornholtz
 - Tim's Contact Information:

Tim Bornholtz

Phone: 202-377-3465

E-mail: Tim.Bornholtz@ed.gov



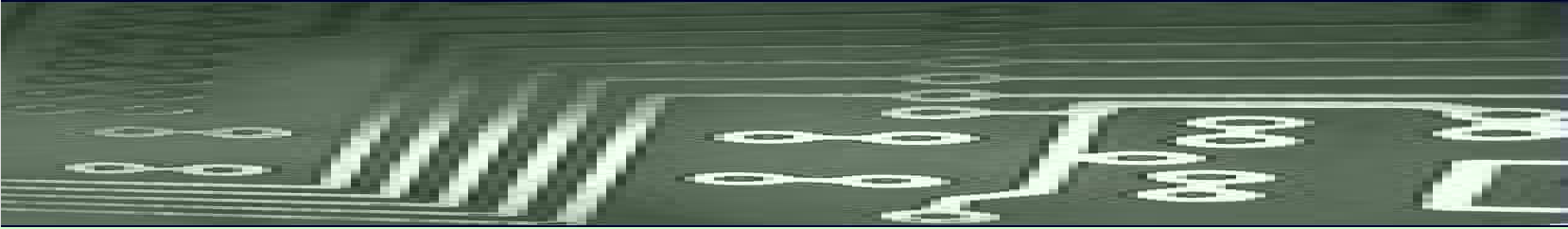
ADvance Update

Jim McMahon

Deputy Project Manager, ADvance

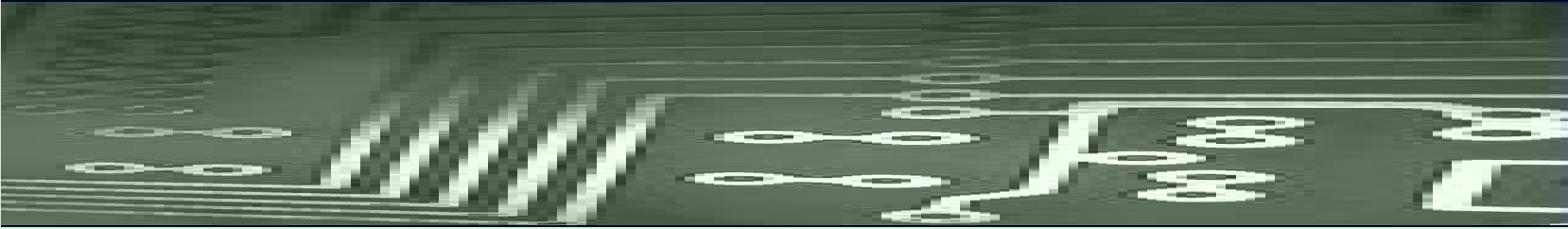
Renee Wade

Lead, ADvance System Development



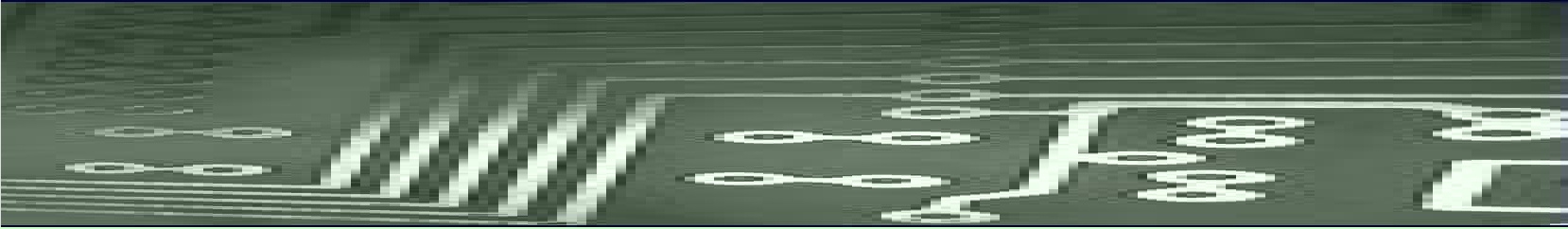
ADvance

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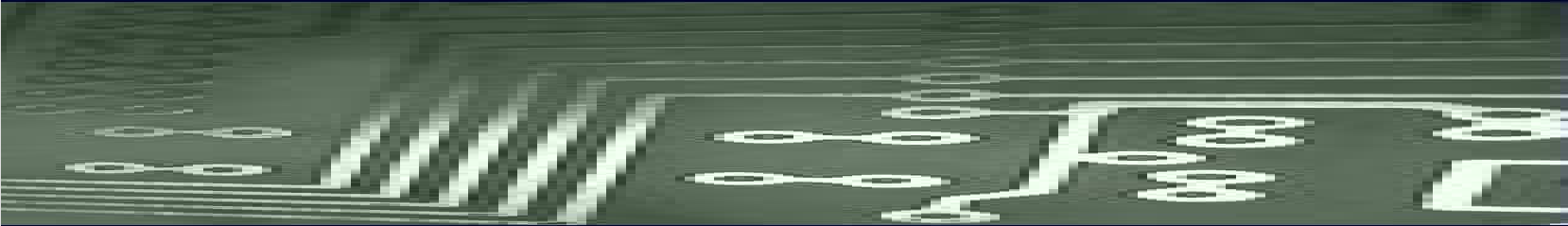
Why Change?

- Current environment makes interaction with systems and finding answers difficult
- Solution provides
 - More efficient processes
 - Integrated technology
 - Increased data integrity
 - Enhanced customer service
 - Greater control



The ADvance Solution

- Goals of ADvance:
 - Increase program integrity
 - Improve customer service



The ADvance Solution

- Supports Aid Awareness outreach activities
- Integrates Application Processing, Origination, and Disbursement systems (AOD)
- Provides Single Customer Contact Center
- Provides Single Technical Help Desk
- Provides enhanced Portal Solution with integrated Web views & tools
- Simplifies students'/parents' and trading partners' interactions with Federal Student Aid (FSA)

ADvance: A School's View

Web Products for Students

Student Portal,
FAFSA on the Web,
E-MPN

Web Products for Schools

Schools Portal, FAA
Access, R2T4

Software Products for Schools

EExpress

Application

Aid
Awareness

Establish
Person
Record

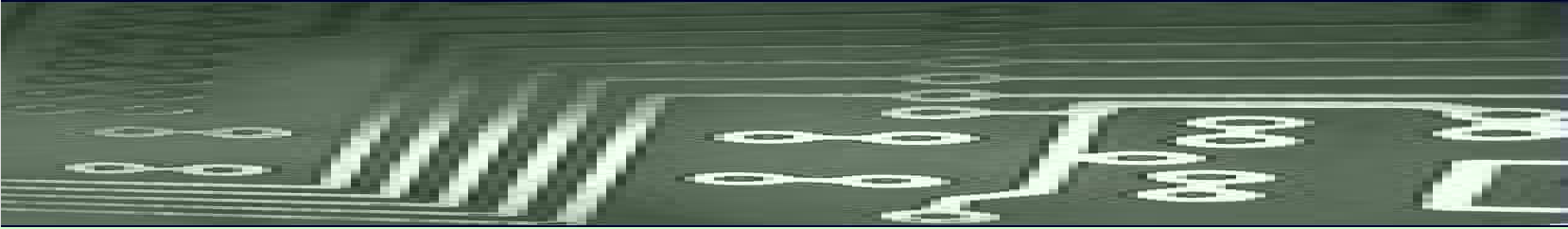
Aid Eligibility
Determination

Origination & Disbursement

Award &
Disbursement
Processing

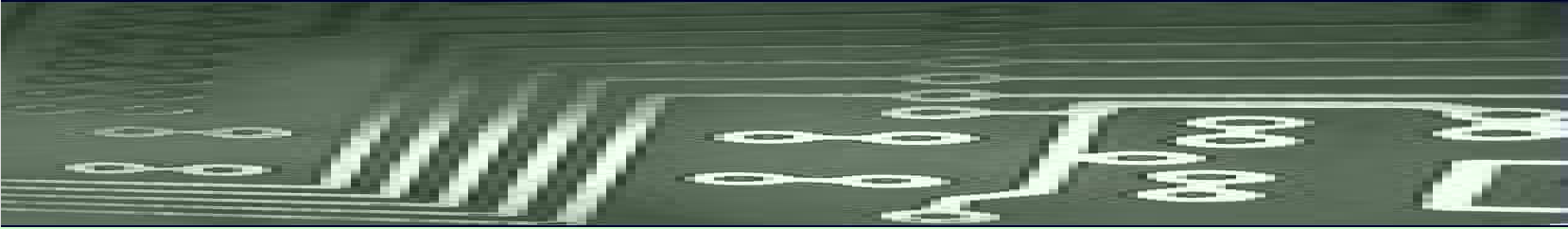
School Aid Payments
& Funding Level Mgmt

Help Desk Support



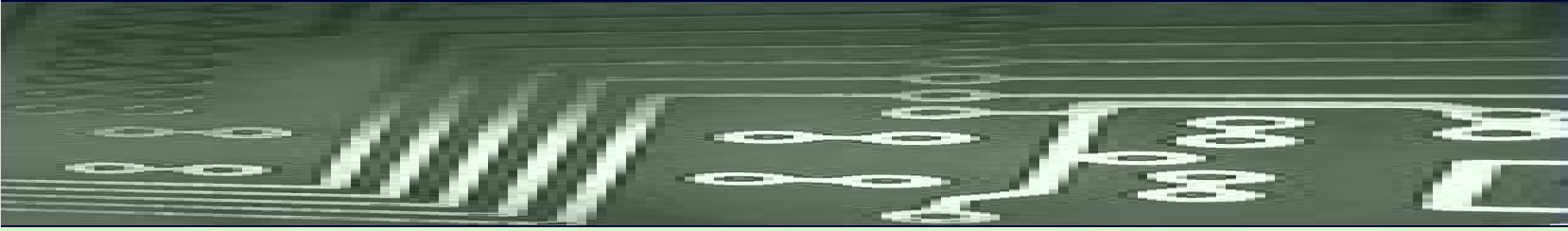
ADvance Highlights

- Improved support for aid awareness and outreach
- Increased online functionality for customers
- Single enhanced portal for all customer segments (public, student/parent, and schools)
- End-to-end view of financial aid lifecycle via the Portal (filing of FAFSA through disbursement of funds and repayment of loans) for the FAA and Student



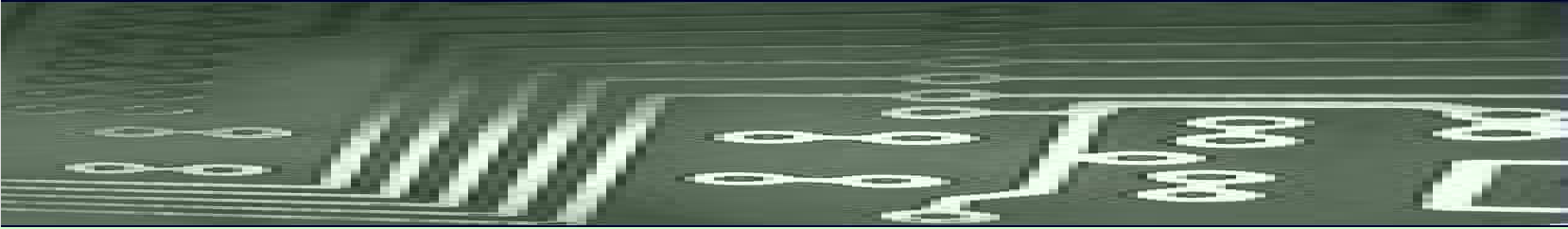
ADvance Highlights

- Consolidated rules and edits across applications
- Stable, non-changing System Identifier (SID)
 - Will never change
 - Will uniquely identify every participant in the application, origination, and disbursement processes



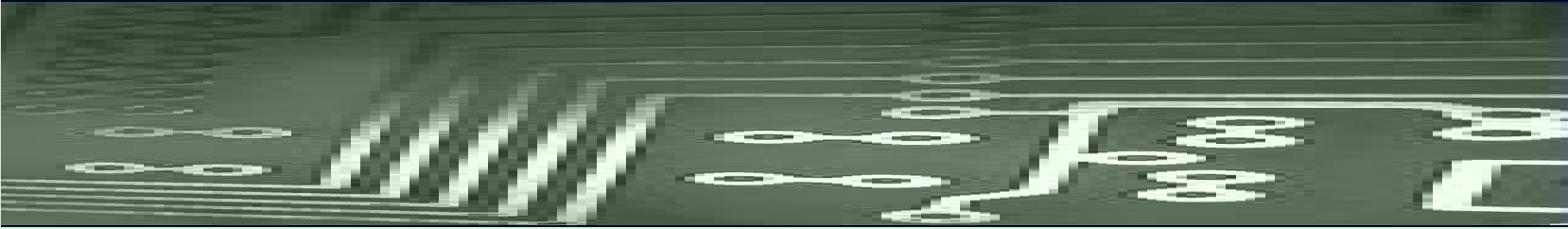
Target State Goal

- Visioning Activities
 - Spring Conference
 - Focus Groups (NASSGAP, NSLC, High School Counselors, NASFAA)
 - FSA Visioning Sessions
 - Advisory Committee Report
 - Ideas/suggestions submitted through e-mail



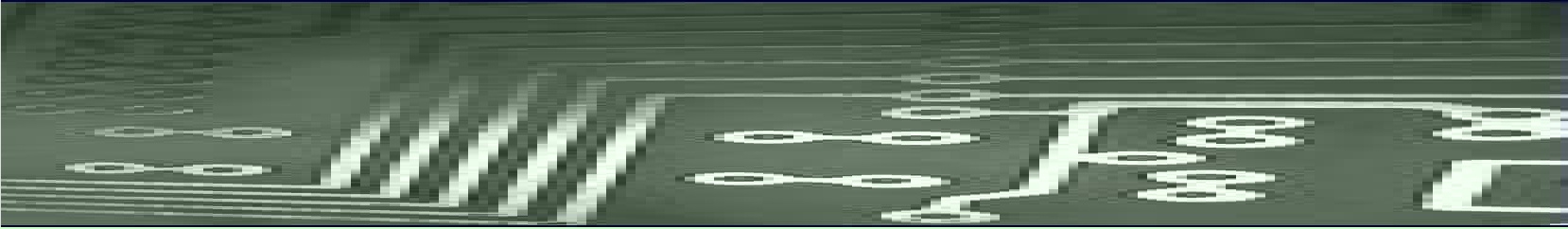
Highlights of Potential Requirements

- Assign a unique system identifier (SID) to each unique individual interacting with ADvance
- In addition to the SID, each user will have a unique self-selected customer identifier (CID) they can modify, which will replace the current “stable data” (SSN, DOB, and 1st 2 letters of the last name), and be used as part of the credential, along with the PIN for authentication



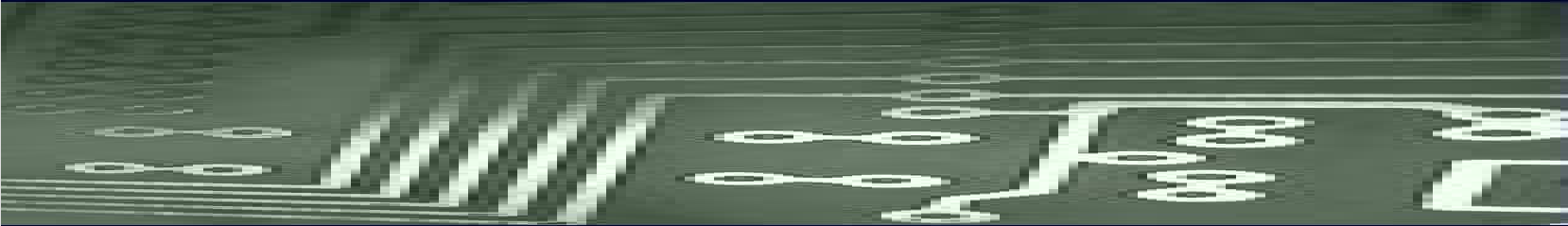
Highlights of Potential Requirements

- Establish routing identifier (RID) as a unifying identifier for any partner entity
- Provide User Enrollment for FSA and business partners through the ADvance Portal
- Business partners will access the portal functionality reserved for business partner users by entering their customer ID, RID, and their password



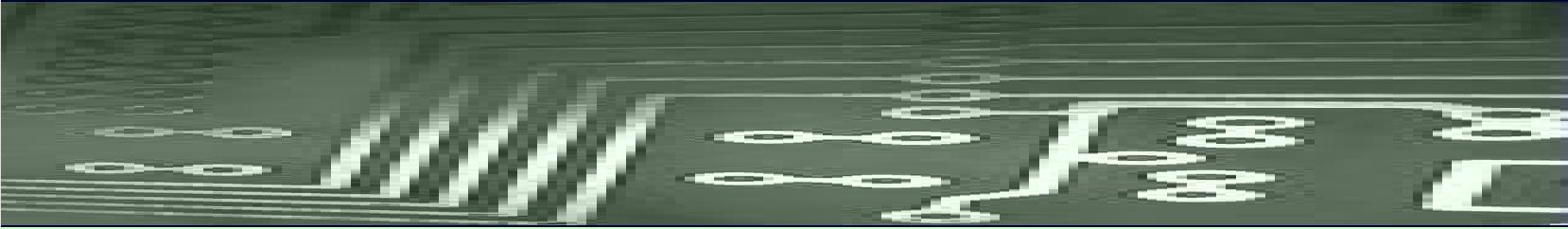
Highlights of Potential Requirements

- Incorporate PLUS application into application processing
- Provide application status and real-time results for web filers through the FSA Portal
- Separate entry and maintenance of the schools that students and parents would like to have receive their processed data from the FAFSA itself to allow the flexibility for the applicant to authorize as many schools as needed and to change that authorization at any time



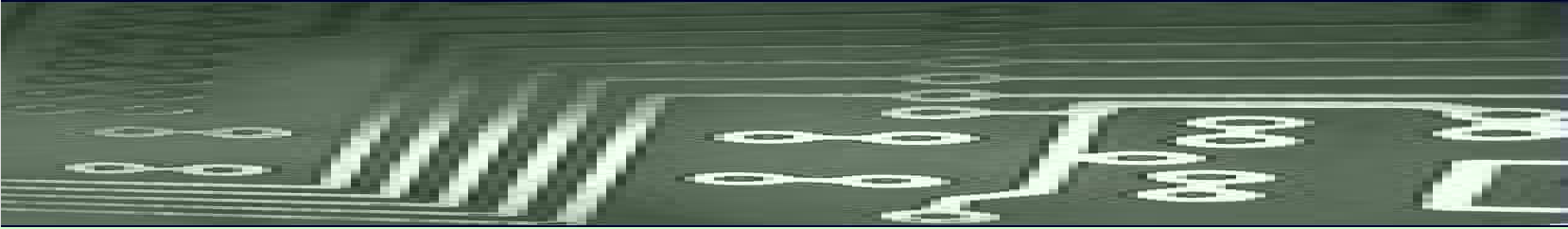
Highlights of Potential Requirements

- Provide on-line information in languages other than English and business functions/outputs in Spanish
- Include the ability to collect information during the “apply” stage to track how applicants became aware of the application process and at what age
- Use pre-population process to allow income tax preparation software vendors to link to FOTW to allow families to import their tax information or add a link to the IRS website.



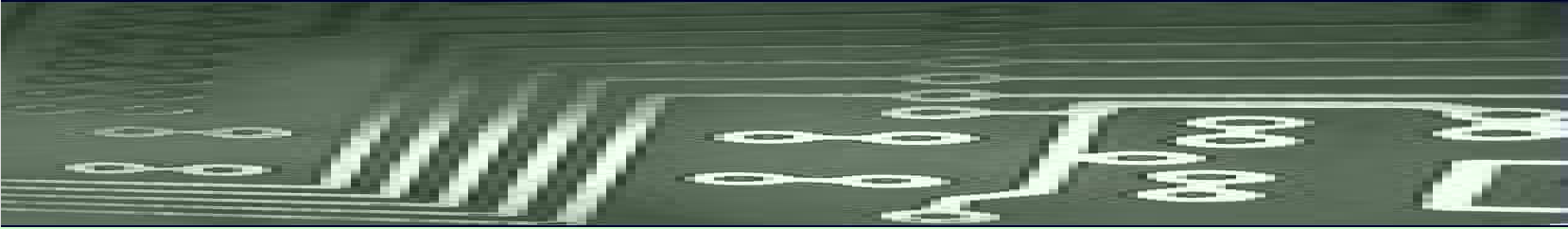
Highlights of Potential Requirements

- Calculate EFC for records that are missing signatures and include EFC on ISIR record
- Calculate the Parent Contribution for independent students who are applying at schools with Health Profession Programs
- Based on initial EFC calculations, provide Students with an estimate of their Pell grant eligibility



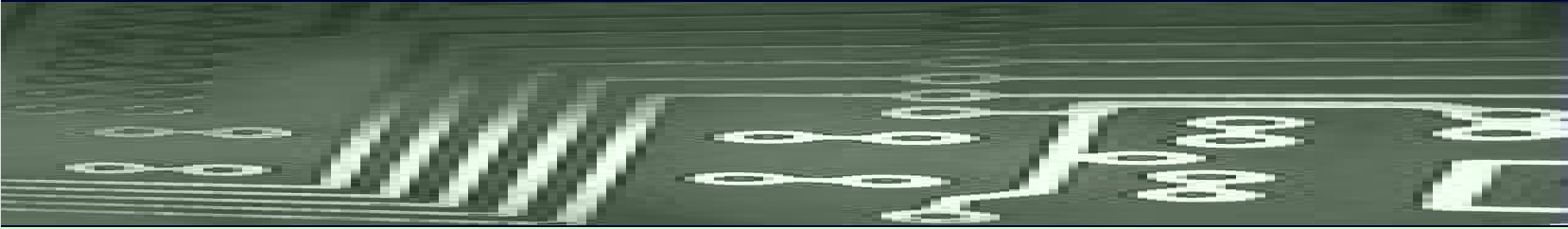
Highlights of Potential Requirements

- The business rules and edits used in the Central Processing System (CPS) and Common Origination and Disbursement (COD) will be evaluated and consolidated
- Don't allow student to make corrections to specific fields if FAA has verified and/or paid on record



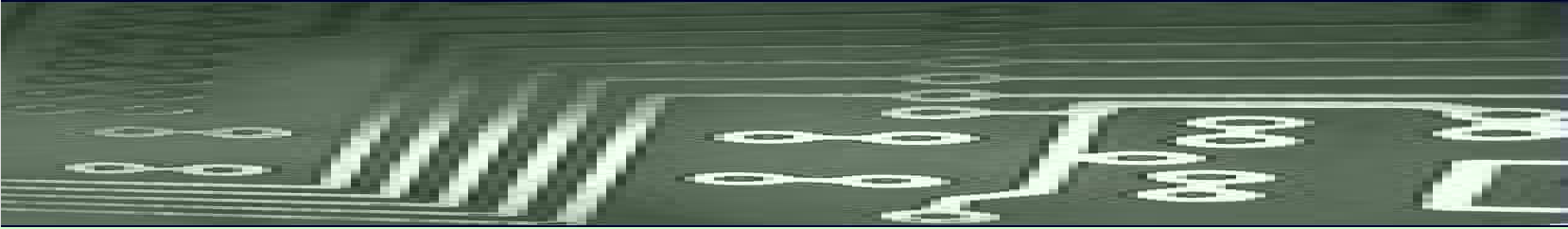
Highlights of Potential Requirements

- Allow pennies to process for Direct Loans
- An electronic disclosure notice will be implemented that students and parents can access, download, and print via the portal for Direct Loans only
- Allow parent borrowers to initiate the PLUS Loan Appeals process via the ADvance portal



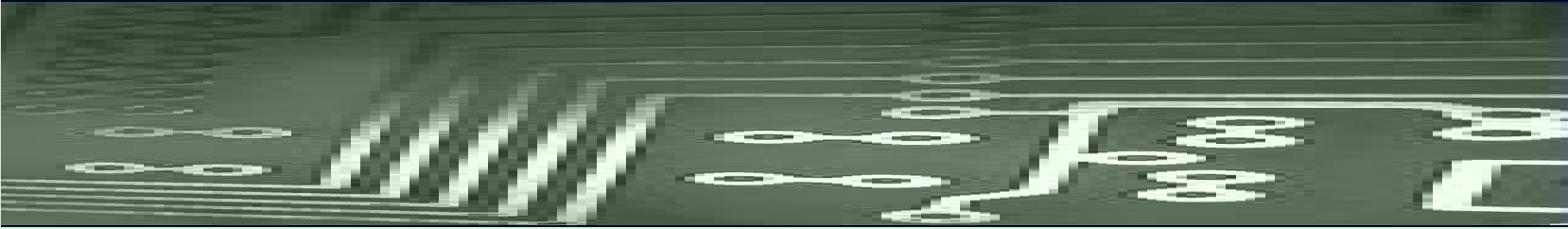
Highlights of Potential Requirements

- Generate reconciliation reports on a regularly scheduled basis to support ongoing reconciliation activities
- Offer on-demand reconciliation as an additional web service that will allow schools to reconcile their transactions against AOD data at any time
- ADvance will include receiving, processing, and maintaining Campus Based disbursement data at the school and student level



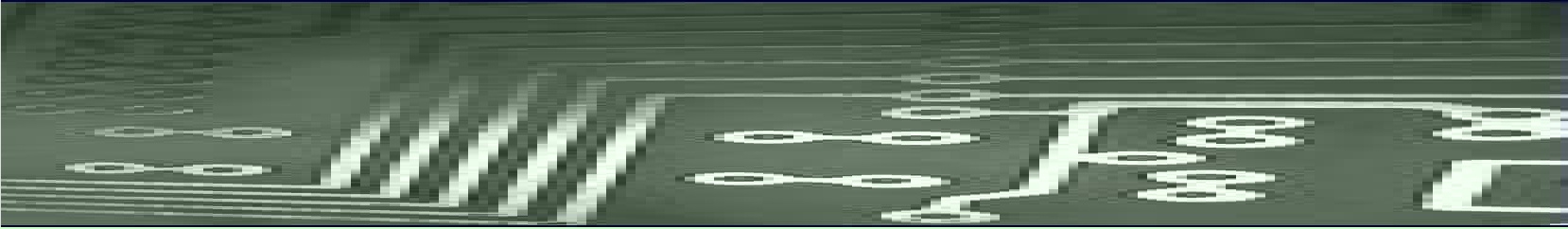
Highlights of Potential Requirements

- Allow schools to pre-define parameters which would ‘auto-load’ data for the ISIR Analysis Tool process and generate reports automatically as a result
- Provide an EDExpress product on-line (continue to produce current PC product)
- Provide users with a reconciliation tool for Pell and Direct Loans



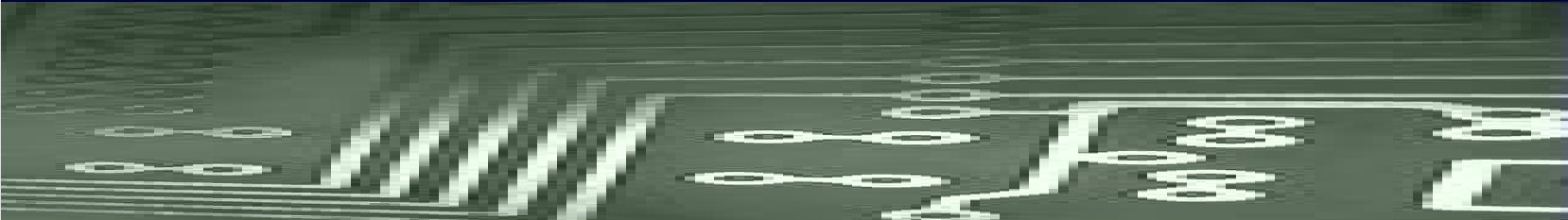
Implementation: Key Dates

- Initial Go-Live January 2007 for 2007-08, application processing only
 - Includes system and new tools for customer service (e.g. integrated views)
- Full award year processing for integrated application, origination, and disbursement for 2008-09



Implementation: Risk Mitigation

- Gradual transition of origination and disbursement help desk and system processing
 - Transition of oldest prior years first (lowest volume of transactions)
 - 6 months+ of parallel system processing



Stay Informed

The screenshot shows the Microsoft Internet Explorer browser window displaying the Advance website. The address bar shows the URL <http://advance.ed.gov/>. The website header includes the U.S. Department of Education logo and the text "ADvance, the future of Aid Delivery". Below the header is a navigation menu with links for Home, FAQ, ADvance in the News, Related Links, Ask ADvance, and Privacy. The main content area features the heading "ADvance, the future of Aid Delivery" and a paragraph of text. The taskbar at the bottom shows the Start button and several open applications, including "Inbox - Mic...", "Advance - ...", "ADvance w...", and "Microsoft P...". The system clock in the bottom right corner displays "2:23 PM".

U.S. Department of Education
ADvance, the future of Aid Delivery

FSA
FEDERAL STUDENT AID
We Help Put America Through School

We Help Put America Through School

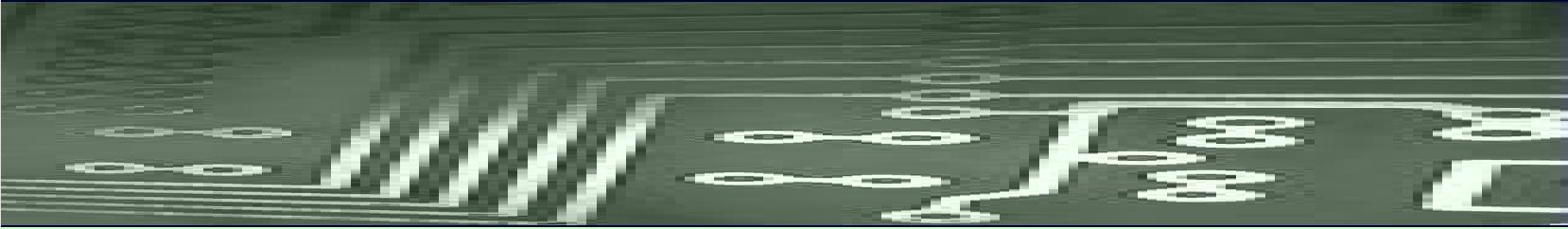
ADvance

[Home](#) [FAQ](#) [ADvance in the News](#) [Related Links](#) [Ask ADvance](#) [Privacy](#)

ADvance, the future of Aid Delivery

On February 1, 2005, Federal Student Aid announced the award of the Front-End Business Integration contract to integrate Federal Student Aid's aid outreach, application, Pell Grant and Direct Loan origination and disbursement processes into a single integrated solution. On March 21, 2005, FSA unveiled the new name for the solution: ADvance.

The ADvance solution creates a fully integrated system that consolidates and streamlines common



Contact Us

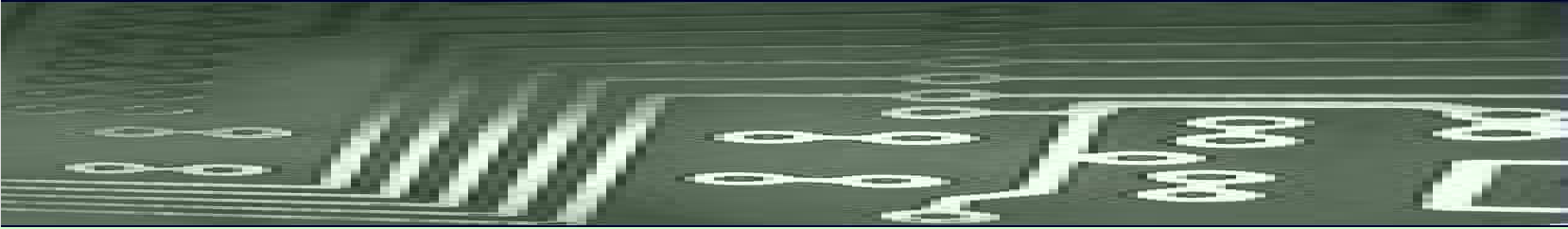
We appreciate your feedback
and comments!

Jim McMahon

James.McMahon@ed.gov

Renee Wade

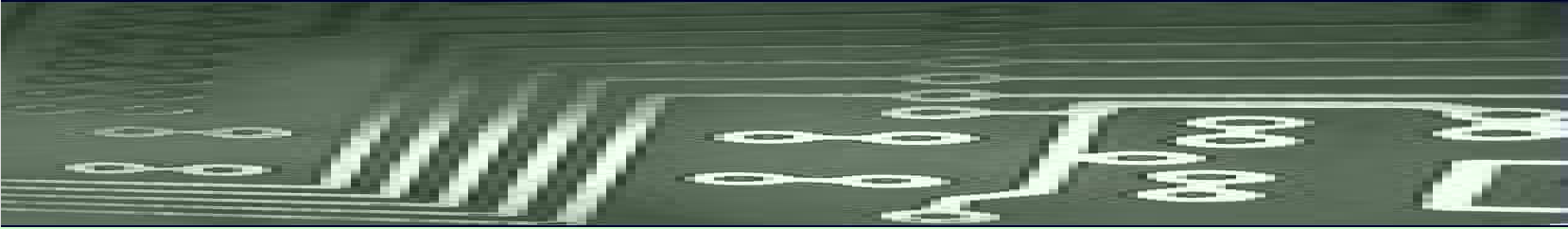
Renee.Wade@ed.gov



NSLDS Update

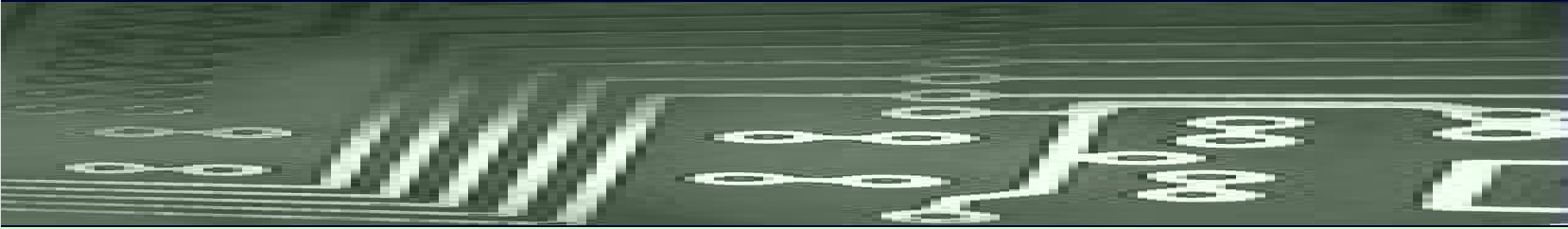
Ron Bennett

Information Technology Specialist



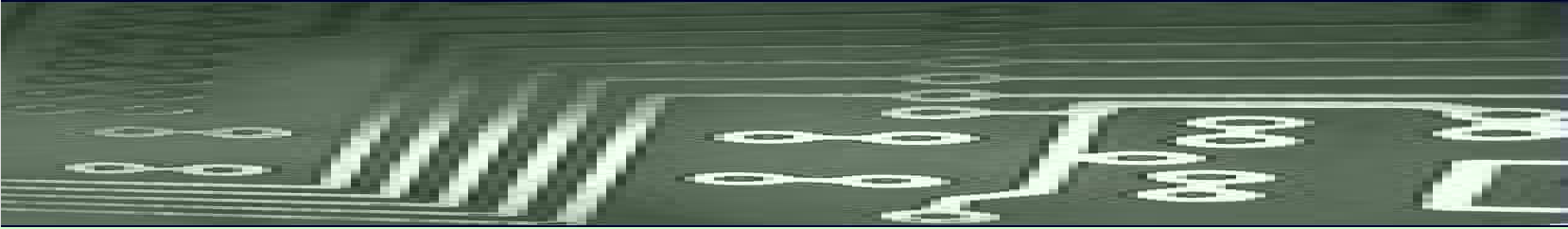
Capturing Balance History

- Prior to March 2005, historical data on OPB and OIB amounts not stored or displayed in NSLDS
- As of late March 2005, NSLDS started to store and display OPB and OIB related data



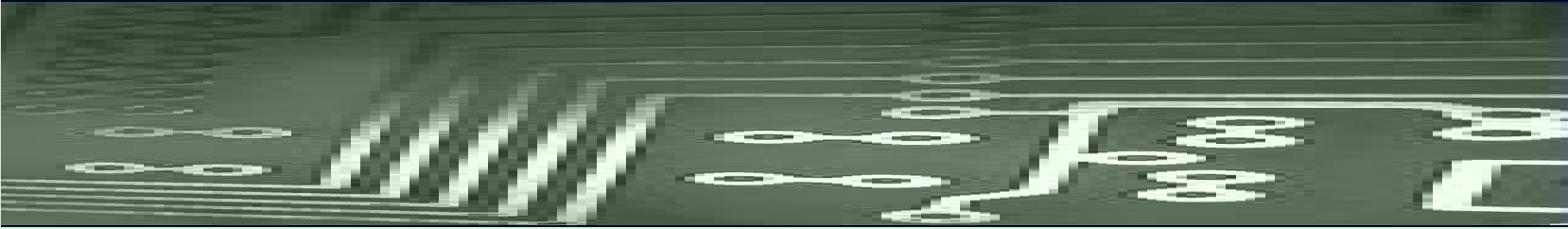
Capturing Balance History

- Historical data related to OPB and OIB reported prior to March 2005 will not be available
- Historical balances only seen on www.nslidsfap.ed.gov web site and not student's web interface
- Formulas for calculating aggregates have not been changed



Capturing Balance History



- Changes will not affect the Prescreening or Postscreening processes
- NSLDS captures OPB/OIB information:
 - At end of each quarter
 - Before and after a loan status code change

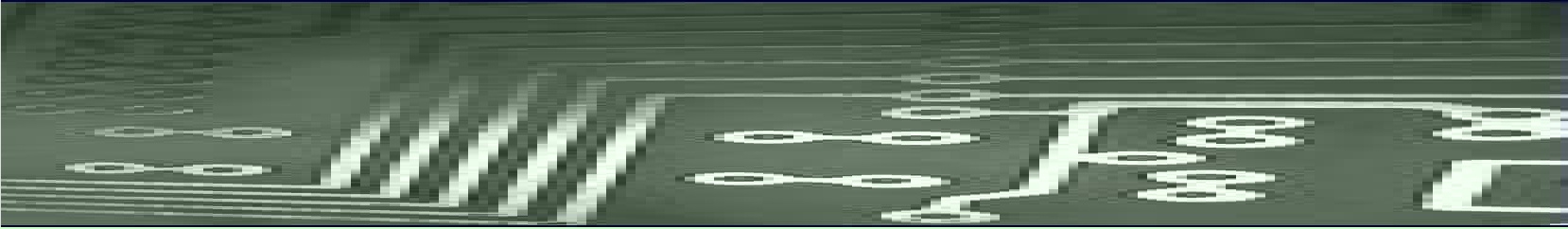


Viewing OPB and OIB History

- History icons appear next to the OPB and OIB fields on the Loan Detail screen

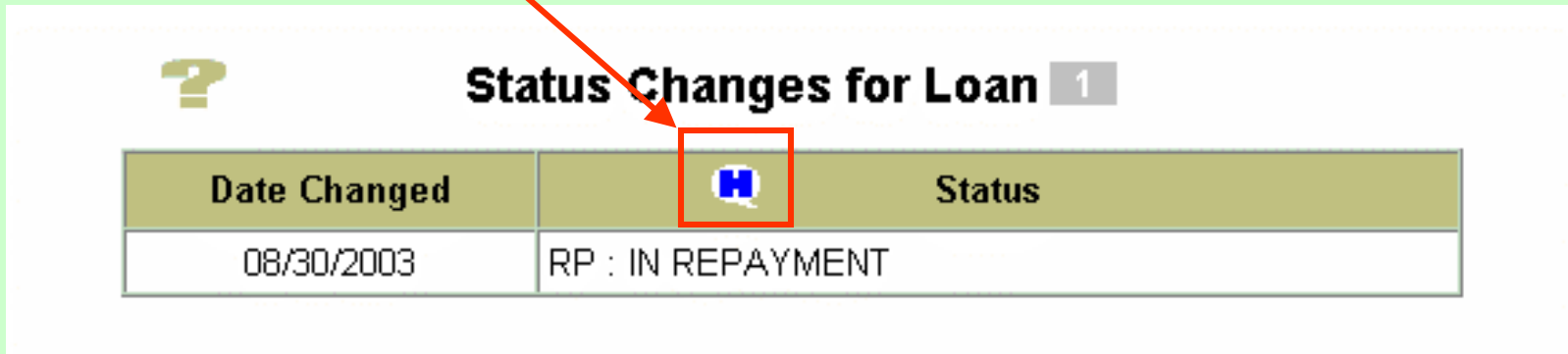
? **Amounts for Loan 1**

	Date	Amount
Loan:	01/05/2004	\$2,750
 Outstanding Principal Balance:	01/05/2004	\$2,750
 Outstanding Interest:	01/05/2004	\$0
Other Fees:		\$0



Viewing OPB and OIB History

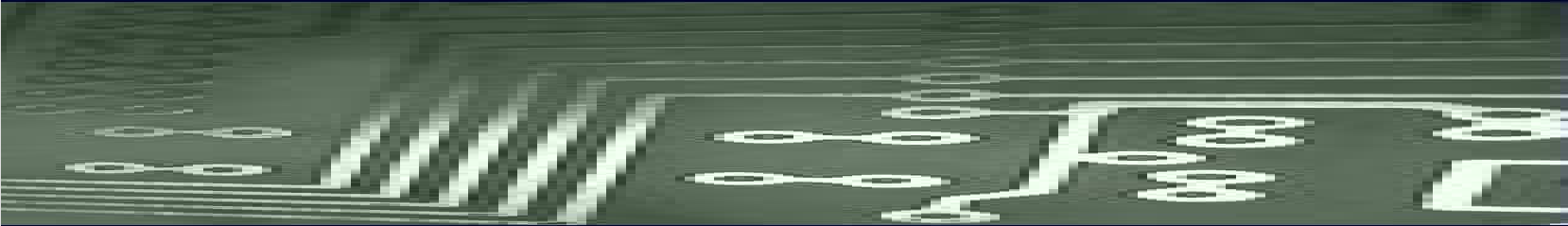
- History Icon displayed in the Loan Status information



A screenshot of a web interface showing loan status information. At the top left is a question mark icon. The main heading is "Status Changes for Loan 1". Below this is a table with two columns: "Date Changed" and "Status". A red arrow points from the bullet point above to a blue "H" icon in the "Status" column, which is also enclosed in a red square. The table contains one row of data: "08/30/2003" in the "Date Changed" column and "RP : IN REPAYMENT" in the "Status" column.

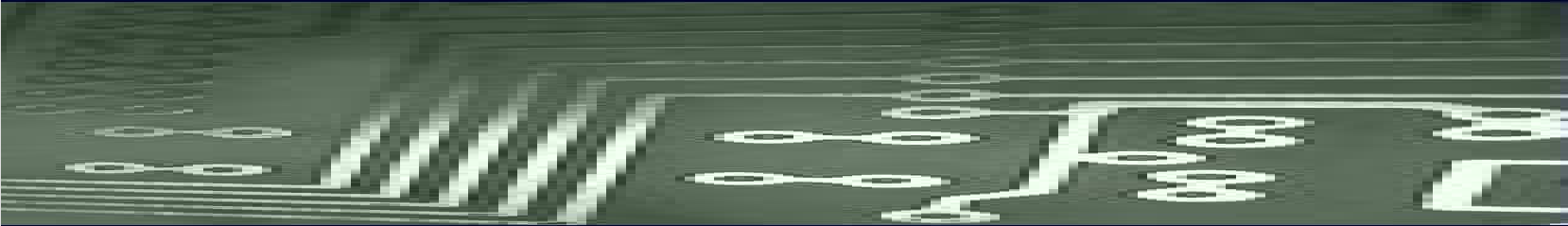
Date Changed	Status
08/30/2003	RP : IN REPAYMENT

- Clicking the history icon displays the Outstanding Amount Balance History




Viewing OPB and OIB History

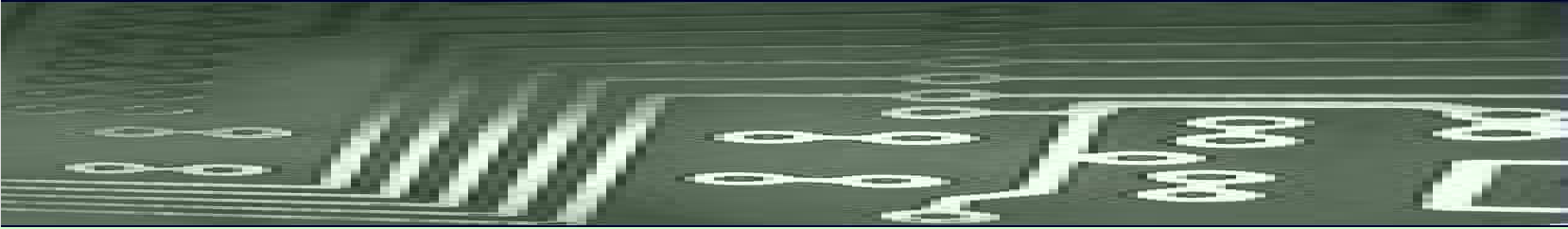
NSLDS System Effective Begin Date/End Date		Outstanding Principal Balance/ Date Of	Outstanding Interest Balance/ Date Of	Status Code/ Date Of	Historically Correct Loan Status
08/02/2005	Current	\$2,750	\$0	IG	Yes
		01/05/2004	01/05/2004	08/02/2005	
12/02/2004	08/01/2005	\$2,750	\$0	IA	Yes
		01/05/2004	01/05/2004	01/05/2004	
11/02/2004	12/01/2004	\$2,750	\$35	RP	No
		01/05/2004	05/01/2004	11/01/2004	
05/02/2004	11/01/2004	\$2,750	\$0	IG	No
		01/05/2004	01/05/2004	05/01/2004	
01/05/2004	05/01/2004	\$2,750	\$0	IA	No
		01/05/2004	01/05/2004	01/05/2004	



Interpreting the Outstanding Balances History

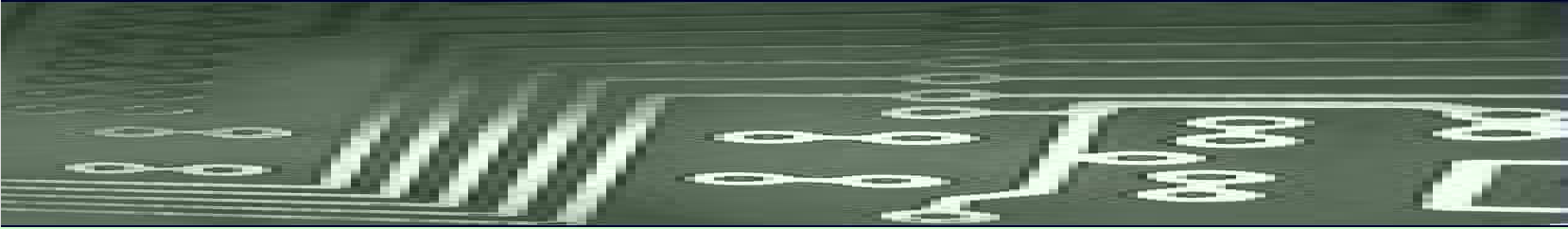
The information Icon displayed next to the value indicates changed data

NSLDS System Effective Begin Date/End Date		Outstanding Principal Balance/ Date Of	Outstanding Interest Balance/ Date Of	Status Code/ Date Of	Historically Correct Loan Status
08/02/2005	Current	\$2,750	\$0	 IG	Yes
		01/05/2004	01/05/2004	08/02/2005	



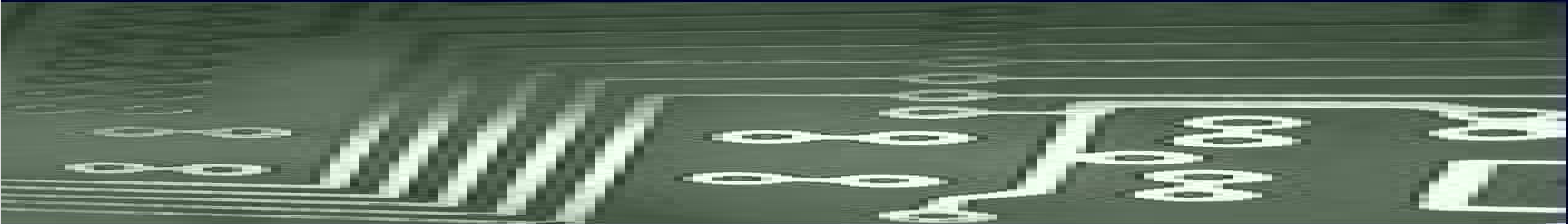
Additional Resources

- NSLDSFAP On-line help pages
 - Loan Detail
 - Outstanding Amount Balance History
- NSLDS Newsletter #10, May 2005

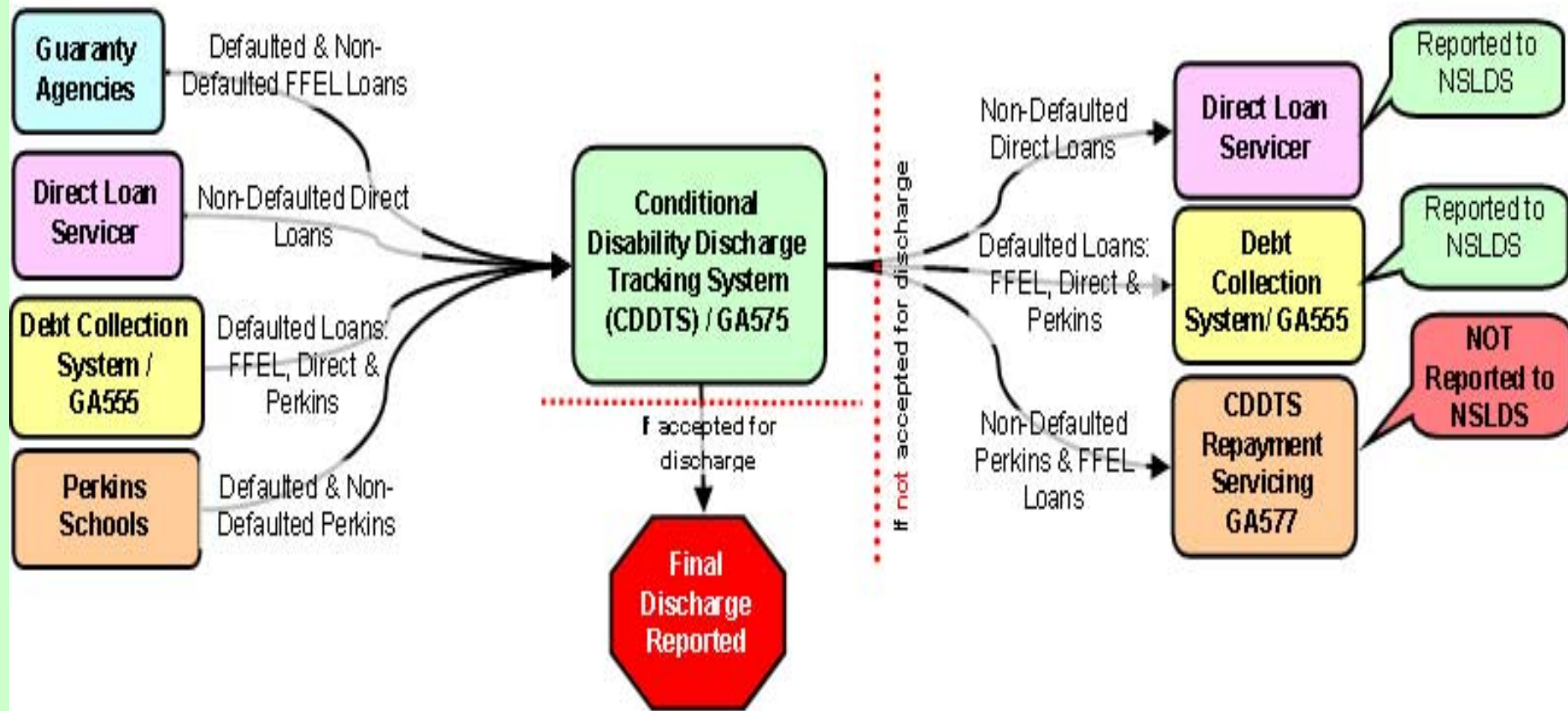


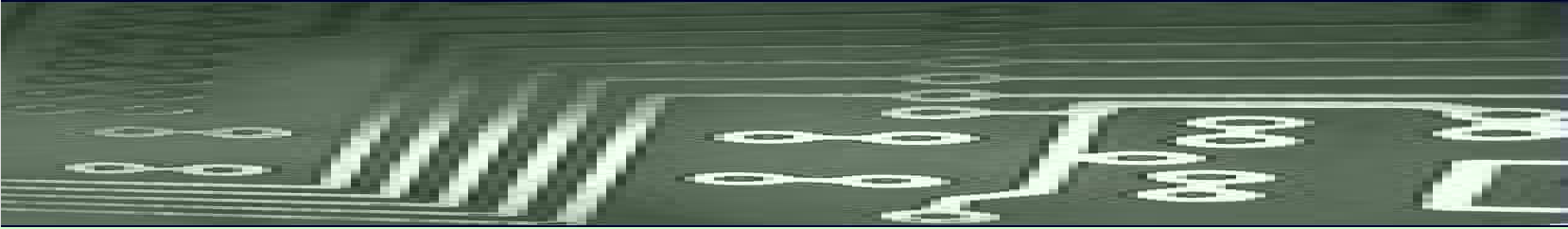
Conditional Disability Discharge Process

- Since late 2002, CDDTS has been administering Conditionally Discharged Loans but not reporting to NSLDS
- As of April 2005, CDDTS began reporting as GA575
 - Balances during Conditional period
 - Closures for Permanently Discharged Loans
 - Loan Status
 - DI- Disability
 - DS- Defaulted, then Disabled



Flow of Loans- To and From CDDTS





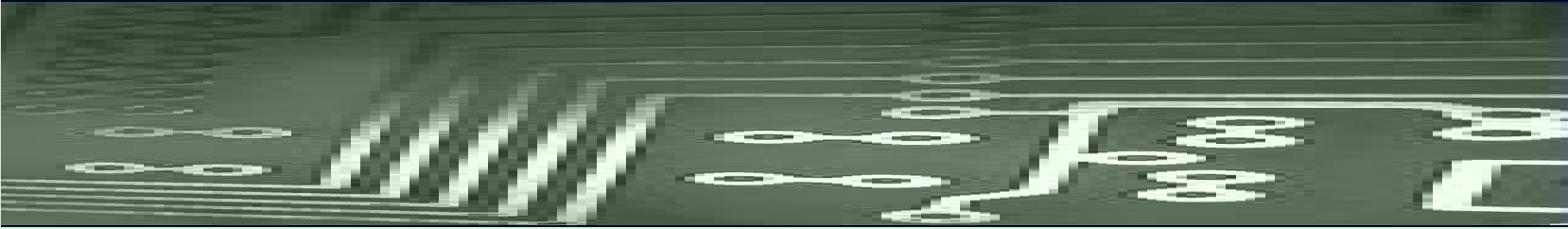
Disability Discharge Flags

- Conditional
 - DI or DS Loan Status Codes and loan balance is greater than \$0

SF - FFEL STAFFORD SUB		Status: DI as of 06/20/2003		Loan Detail			
SACRED HEART UNIVERSITY - 00140300							
Guaranteed Amt:	\$3,931	Disbursed Amt:	\$3,931	OPB:	\$609	Agg. OPB:	\$609
Loan Date:	11/02/1990	Sep. Loan Ind:	A	Loan Period:	09/01/1990 - 12/28/1990		
Last Disb. Date:	11/23/1990	Last Disb. Amt:	\$3,931	Acad. Lv:	3	Discharge:	C
GA: CDDTS - 575							

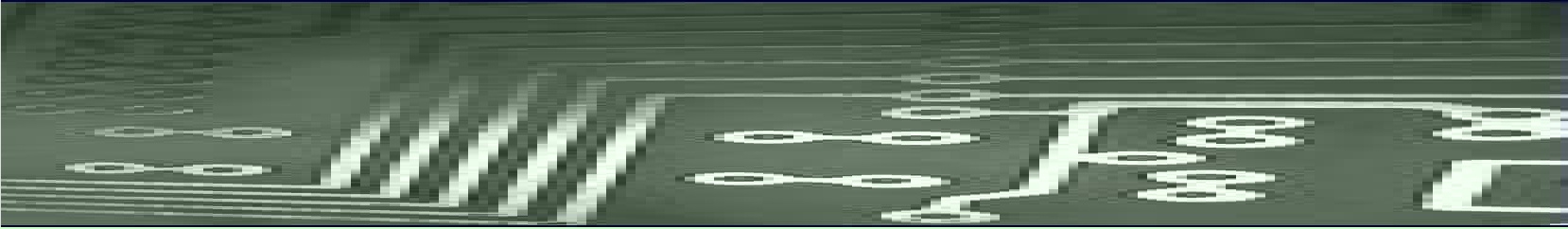
- Permanent
 - DI or DS Loan Status Codes and loan balance is equal to \$0

SF - FFEL STAFFORD SUB		Status: DS as of 12/15/2002		Loan Detail			
WORCESTER STATE COLLEGE - 00219000							
Guaranteed Amt:	\$2,500	Disbursed Amt:	\$2,500	OPB:	\$0	Agg. OPB:	\$0
Loan Date:	10/21/1986	Sep. Loan Ind:	A	Loan Period:	09/08/1986 - 05/14/1987		
Last Disb. Date:	11/17/1986	Last Disb. Amt:	\$2,500	Acad. Lv:	3	Discharge:	P
GA: CDDTS - 575							



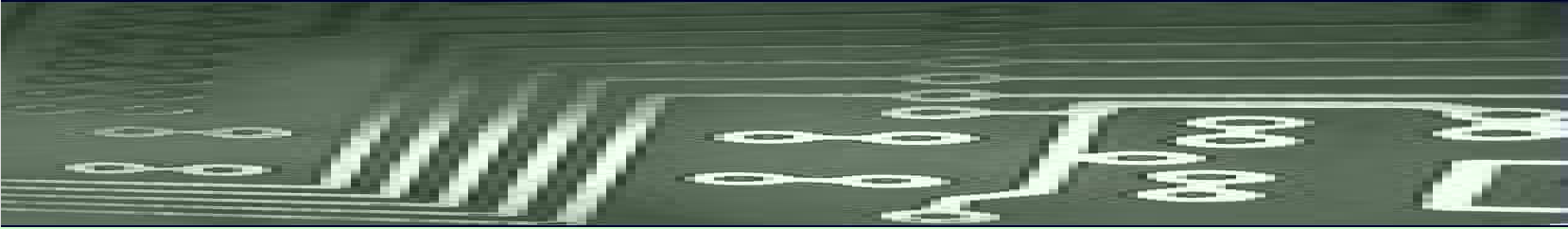
Reinstated Loans

- CDDTS will reassign Reinstated Loans:
 - Direct Lending will receive non-defaulted Direct loans
 - DCS (GA555) will receive all defaulted loans, including Direct Loans



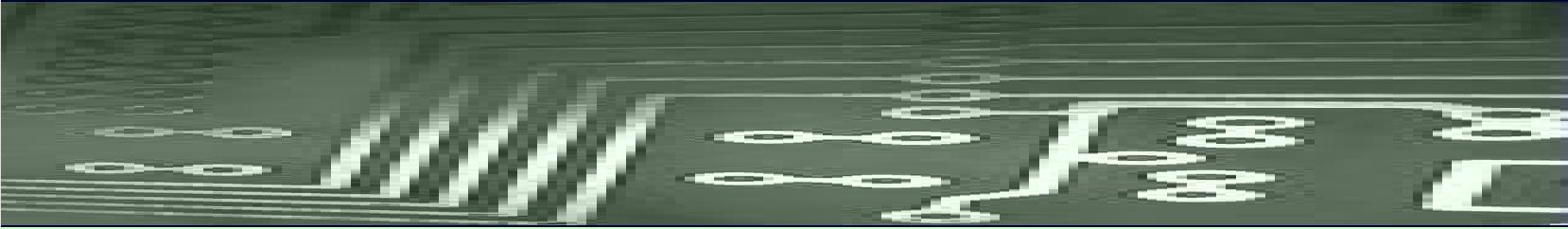
CDDTS Repayment Servicing

- Two types of non-defaulted loans will not be reported to NSLDS after reinstatement:
 - FFEL
 - Perkins
- CDDTS Repayment Servicing (GA577) will receive these loans and should be contacted for status information



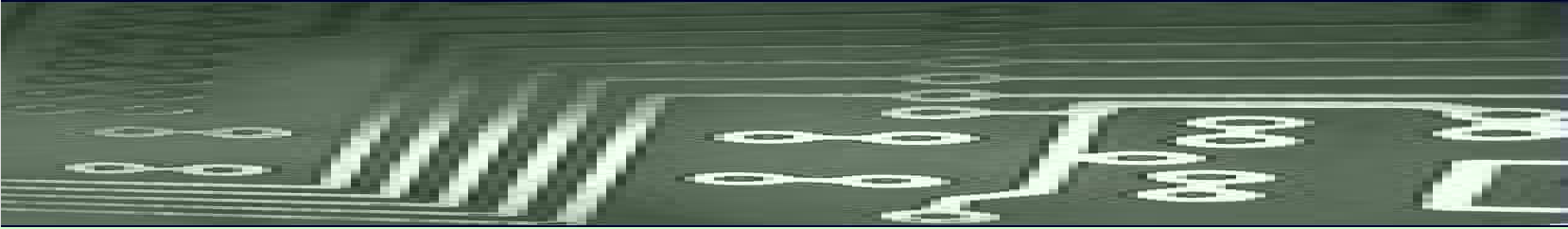
ISIR Data

- Loans associated with GA575
 - Contact Type “DDP” for Disability Data Provider
 - Comment Code: 137
- Loans associated with GA577
 - Contact Type “RDS” for Reinstated Disability
 - Comment Code: 139 (Perkins)
 - Comment Code: 147 (FFELs)



References and Contact information

- Contact information for GA575 and GA577
 - NSLDS Newsletter #10, May 2005
 - NSLDSFAP Organization Contact Information



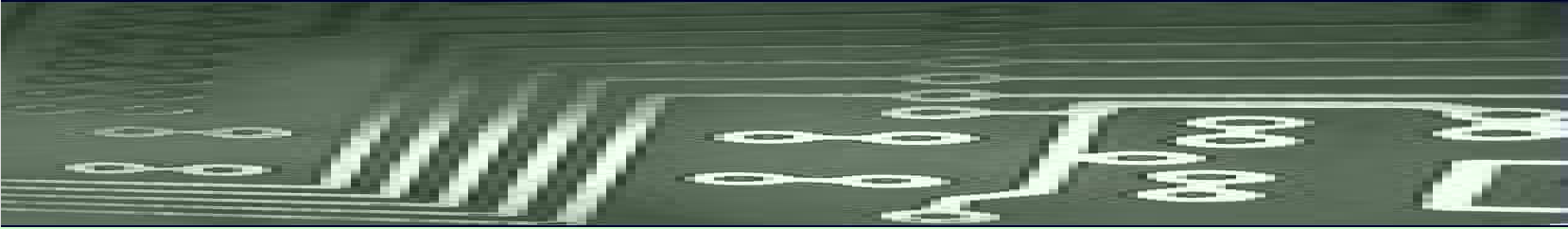
Aggregate Changes for 2006/2007

- NSLDS will derive an unallocated figure for Direct Loans

Loan History

Aggregate Loan Information

Loan Type	Outstanding Principal Balance	Pending Disbursements	Total
Subsidized Loans	\$21,375	\$2,750	\$24,125
Unsubsidized Loans	\$16,000	\$2,000	\$18,000
FFEL Consolidation Loans, Unallocated	\$2,375		\$2,375
Combined Loans	\$39,750	\$4,750	\$44,500
FFEL Consolidation Loans	\$46,000		\$46,000
Perkins Loans	\$0		\$0
PLUS Loans	\$0		\$0



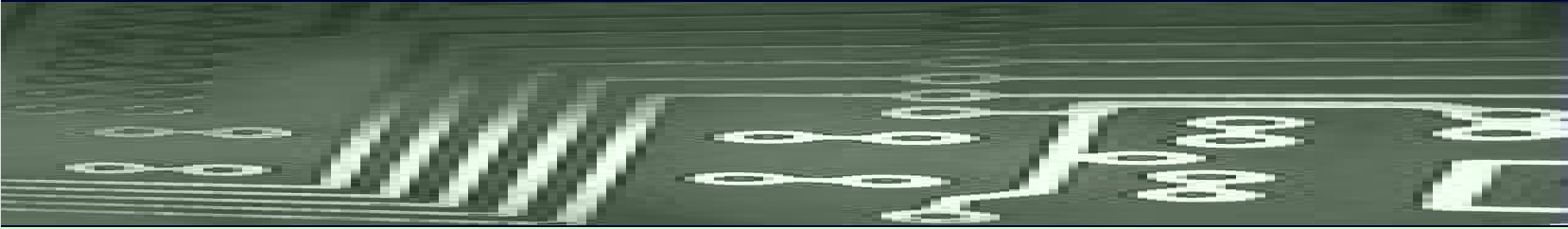
Aggregate Changes for 2006/2007

- Removing FFEL Consolidation Loans

Loan History

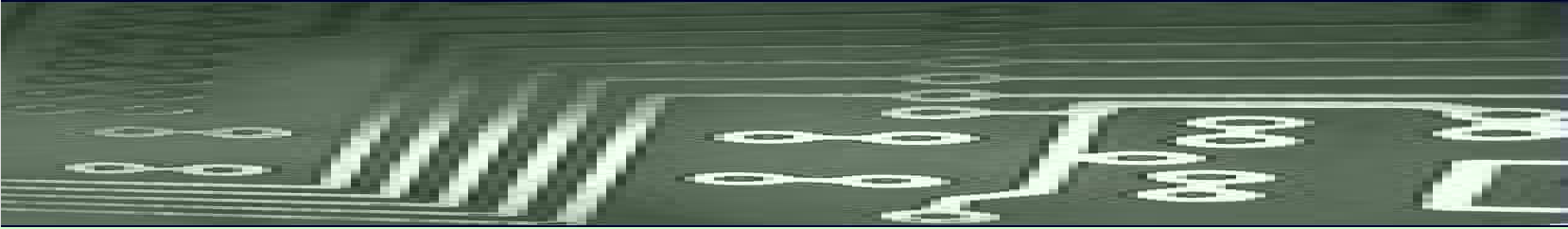
Aggregate Loan Information

Loan Type	Outstanding Principal Balance	Pending Disbursements	Total
Subsidized Loans	\$21,375	\$2,750	\$24,125
Unsubsidized Loans	\$16,000	\$2,000	\$18,000
FFEL Consolidation Loans, Unallocated	\$2,375		\$2,375
Combined Loans	\$39,750	\$4,750	\$44,500
FFEL Consolidation Loans	\$46,000		\$46,000
Perkins Loans	\$0		\$0
PLUS Loans	\$0		\$0

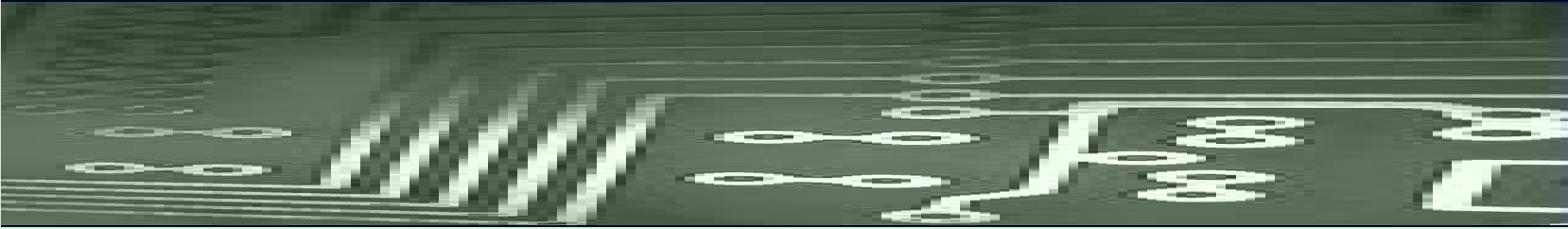


Password/Security Reminders

- Passwords must be 8 characters in length
- At least 1 character must be numeric; 1st character must be letter
- New password must be different than last previous 4 passwords
- Password expires every 90 days



- DCL-GEN-05-06
 - Responsibility reminder for users of NSLDS
 - Provides access and use requirements such as:
 - Student/Applicant Eligibility
 - Collection Activities for Title IV Loans and Grant Overpayments
 - Submitting Student Enrollment
 - Obtaining Default Rate Information
 - Consequence of misuse
 - Management of NSLDS Access

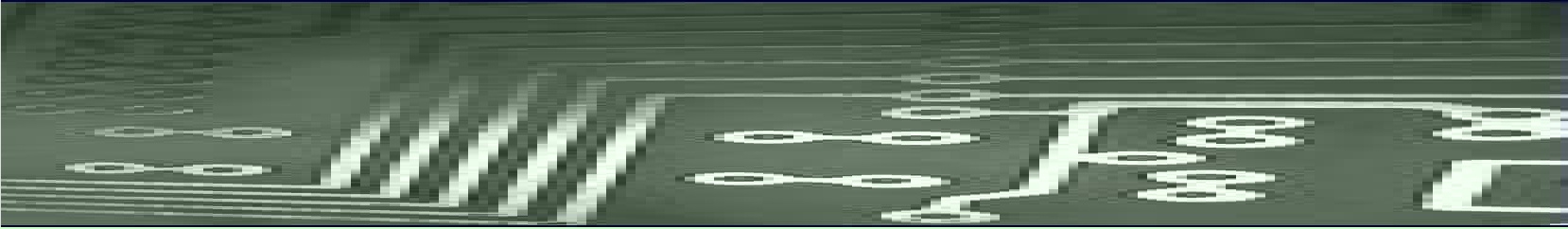


NSLDS Customer Service Center

1-800-999-8219

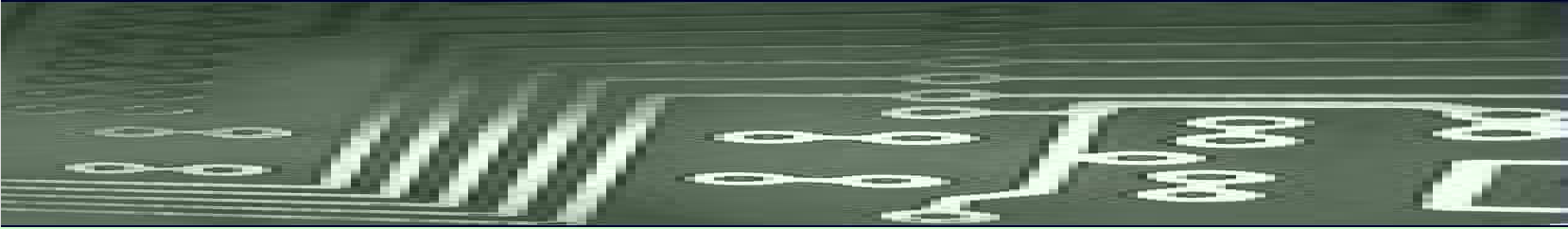
Expert Assistance 8:00 am – 9:00 pm Eastern Time

NSLDS@pearson.com

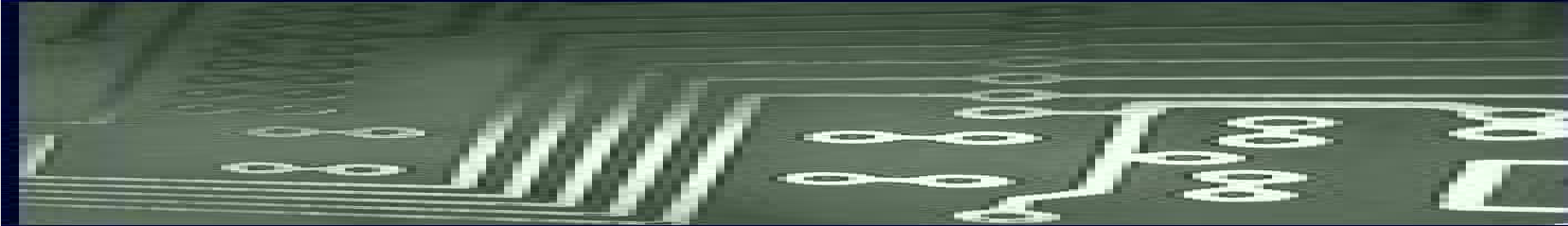


Break

Re-convene at 11:00 am



Welcome Back!



Common Origination and Disbursement (COD) and Central Processing System (CPS) Update

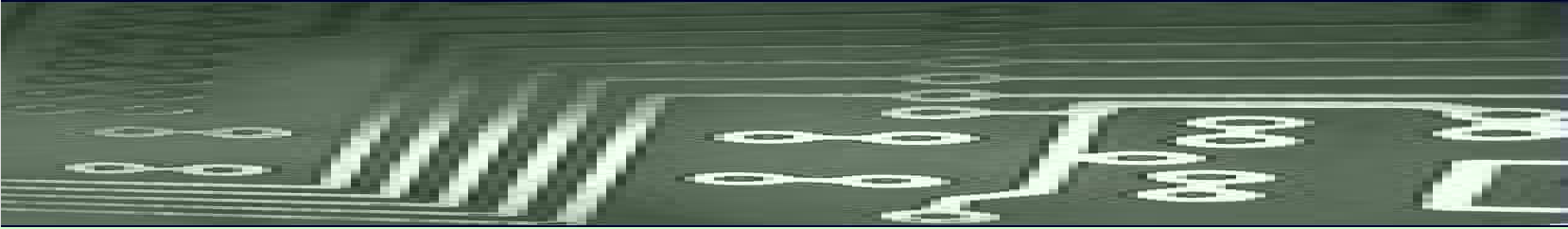
Mike Murray

Director, COD Systems;

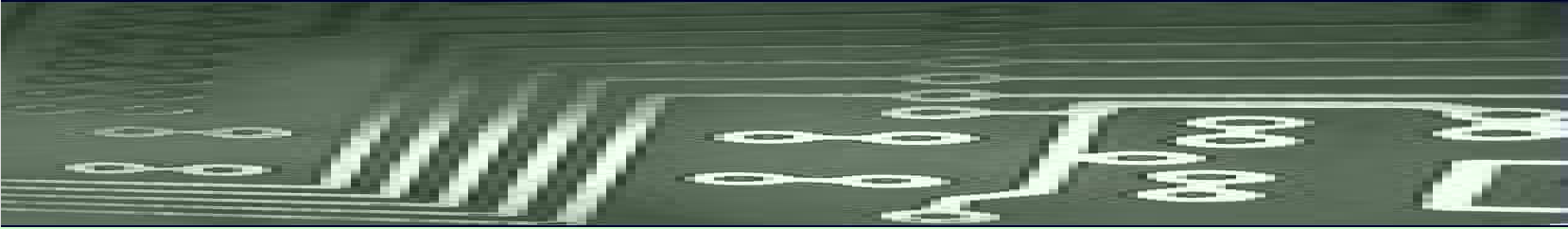
Team Lead, ADvance Systems Development and Implementation

Marilyn LeBlanc

Acting Director of Application Processing, CPS

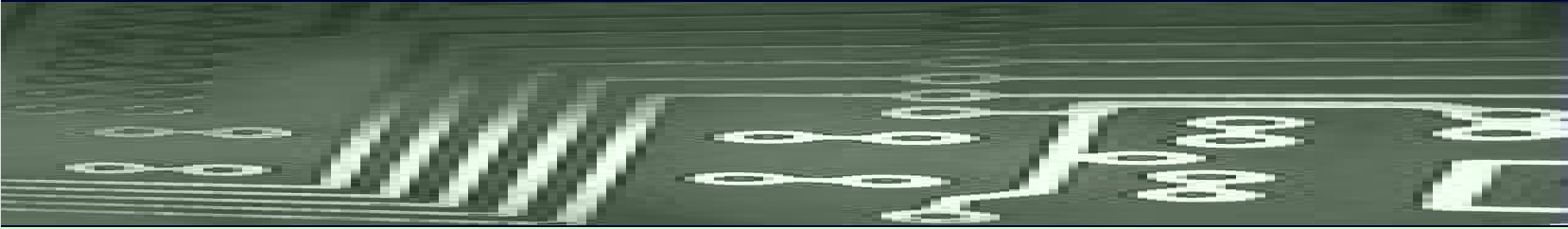


COD Update



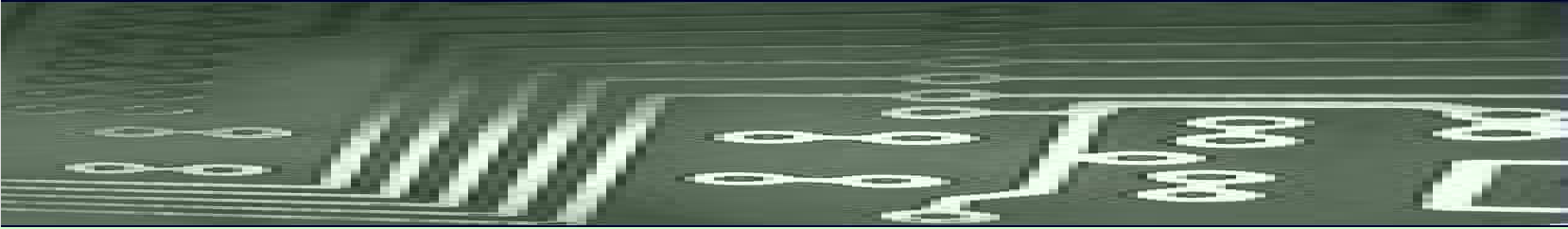
COD Changes

- Limited enhancements or changes to COD due to focus on ADvance
 - Limit development effort for COD solutions to enable software developers to focus resources on ADvance solutions
- Edits – No new edit codes or changes to existing edit codes for 2006-07
- Record Layouts – No record layout changes for 2006-07



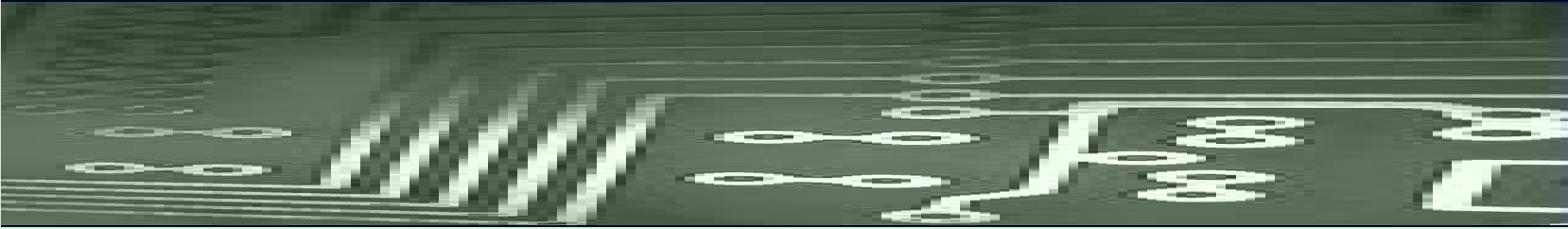
MPNID

- Award Year indicator in the MPNID will roll over to “07” when COD 2006-2007 software is implemented on March 13th
 - Previous years, MPNID rolled over when COD set up funding for the new award year in February prior to the software going live
 - This year, MPNID will not roll over until COD software is implemented in March
 - Beginning on March 13th, schools will receive MPNID with “07” as the cycle year in the CRPN07OP message class



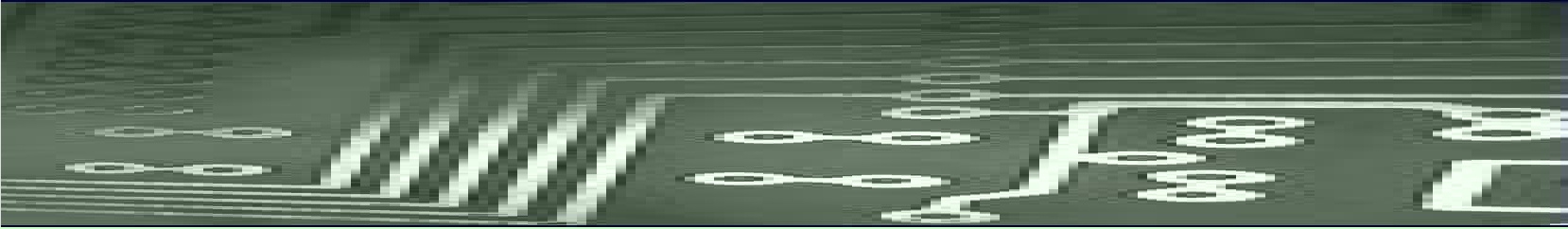
Report Retention

- Beginning in August 2005, previous versions of COD reports will only be available on the web for 365 calendar days from the date the report was generated



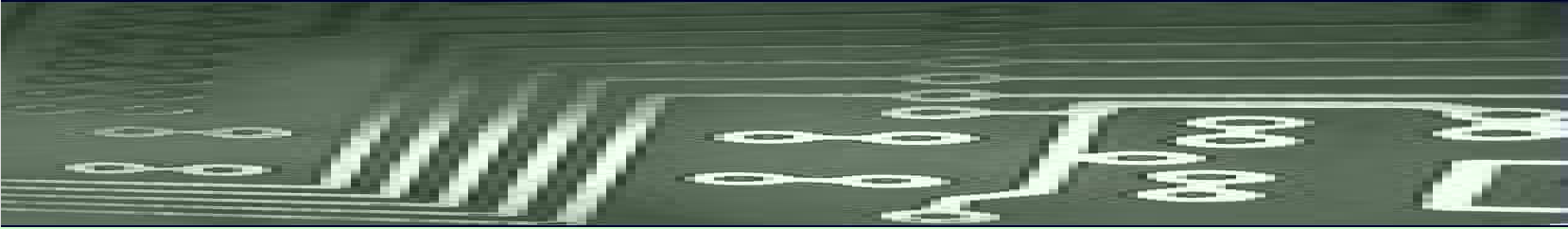
COD Technical Reference

- Draft of the 2006-2007 COD Technical Reference, including edit code, message classes, and record layouts is posted on IFAP
- Final version including Implementation Guide, Report Layouts, and Appendices will be published in November 2005 before the EAC
- There will not be a beta review of the Technical Reference this year due to the minimal changes



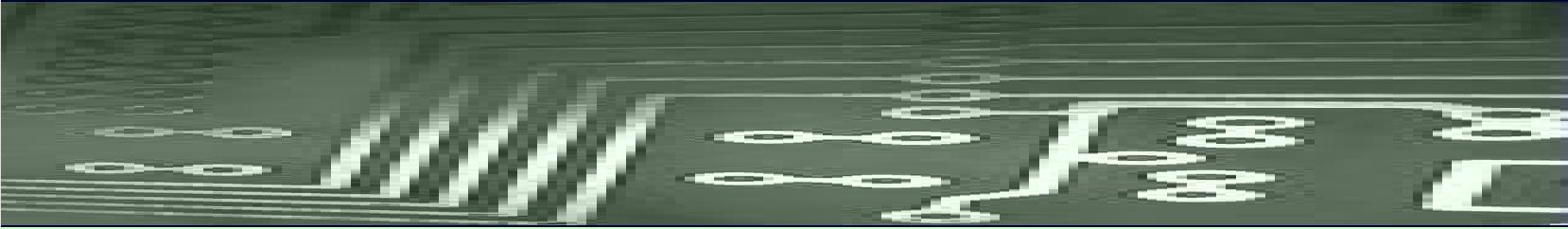
School & Vendor Testing Dates

- Award Year 2005 – 2006 Structure Testing Dates:
April 05 - July 05
- Award Year 2005 – 2006 Unstructured Testing Dates:
May 05 – Feb 05
- We expect the Award Year 2006 – 2007 dates to be similar; we do not know the exact dates



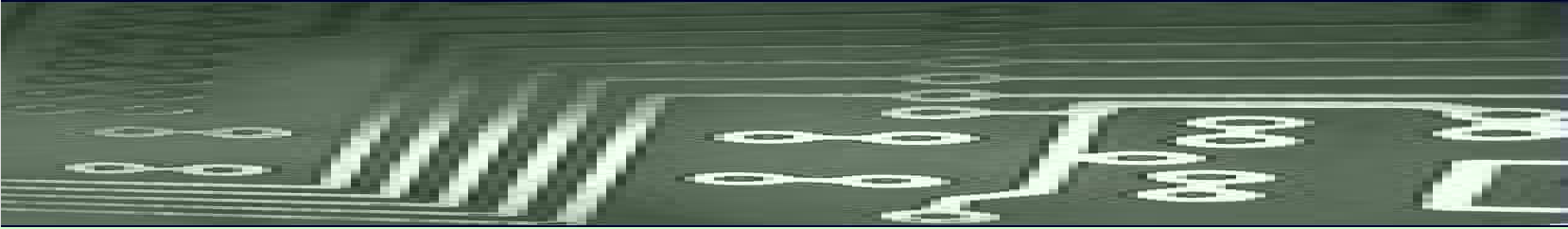
Customer Service Reminders

- First name required for PLUS credit checks
 - Schema and Edit codes indicate that either First or Last name is required
 - In order to process a PLUS credit check, first name and last name of the parent borrower are required
 - A PLUS loan submitted without the parent borrower first and last names will reject



XML Predefined Entity References

- XML does not allow open angle bracket (<), closed angle bracket (>), quotation mark (“), apostrophe (‘), or ampersand (&) within a tag
- If you must use one of these characters, XML has predefined entity references to represent the character
- These are explained in the COD Technical Reference, Implementation Guide – page II-1-19



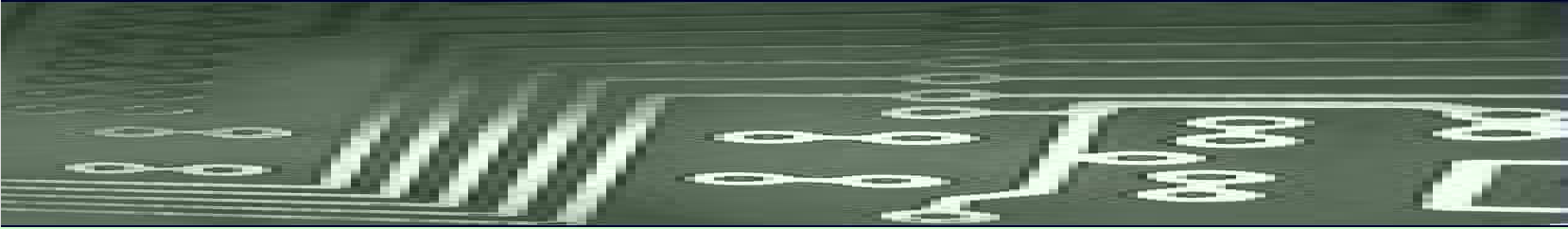
COD Customer Service Center

1-800-4-PGRANT For Pell Grants

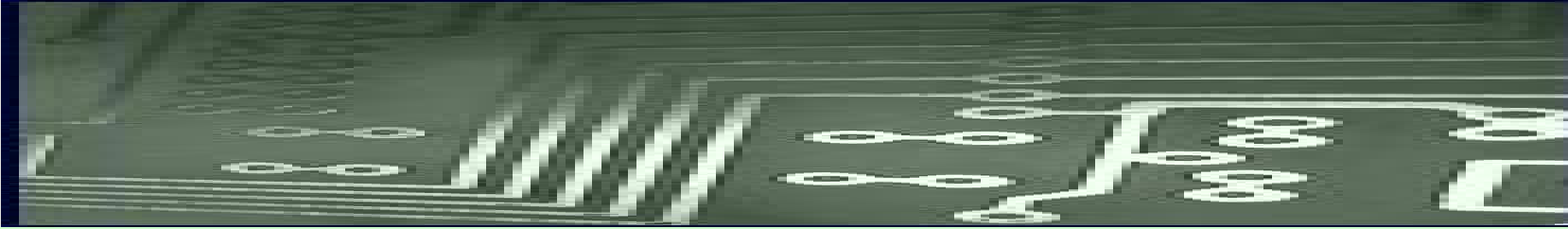
1-800-848-0978 For Direct Loans

CODSupport@acs-inc.com

www.cod.ed.gov



CPS Update

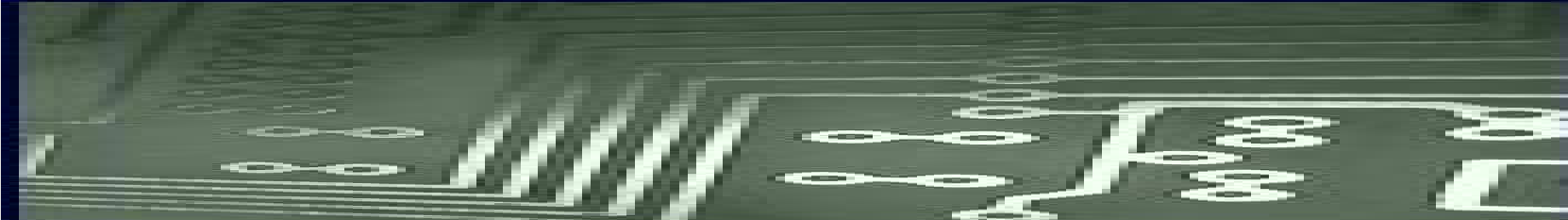


CPS Update

Today's Topics



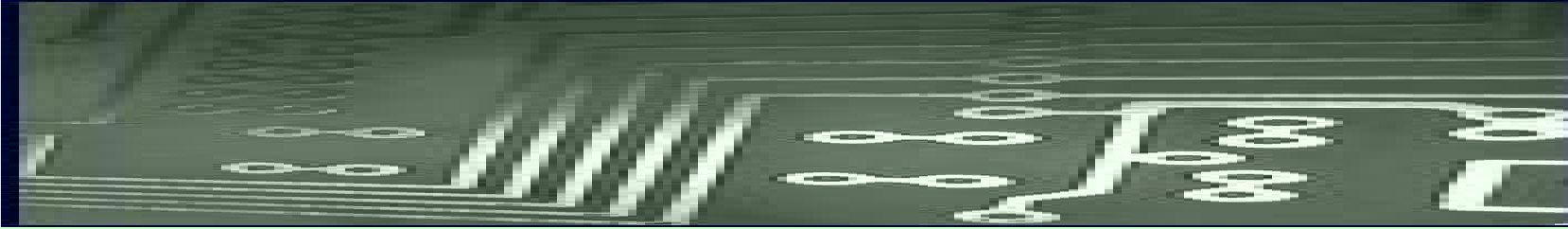
- FAFSA Changes
- Central Processing System (CPS) Changes
- Institutional Student Information Record (ISIR) Changes
- CPS Test System
- EDExpress Changes



CPS Update FAFSA Changes

- No new or deleted questions
- Questions follow same order as last year
- Changes have been made to some instructions and question wording

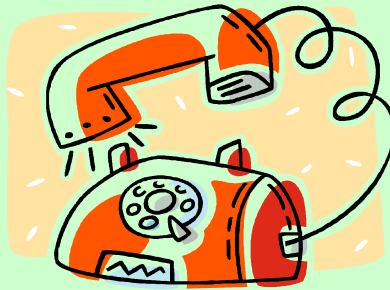
A snippet of the FAFSA form is shown, displaying questions 13, 47, 8, 1142, and 15. The form is titled "FAFSA" and "FREE APPLICATION FOR FEDERAL STUDENT AID". It includes fields for name, address, Social Security Number, date of birth, and date of death. The form is dated July 1, 2006 - June 30, 2007.

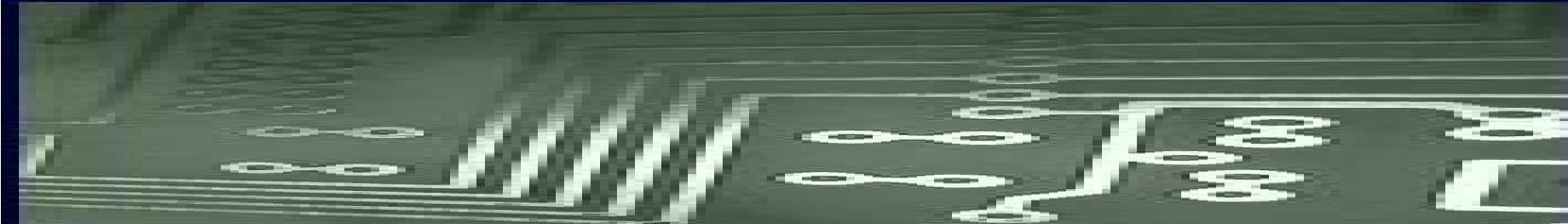


CPS Update

FAFSA Changes

- Questions 33 b. and 71 b.: Will eliminate TeleFile from list of filing options because IRS will no longer offer it as a filing method





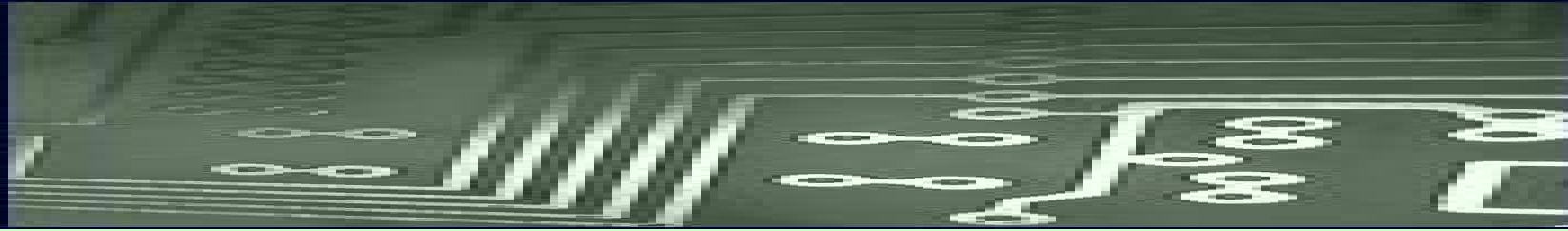
CPS Update

The Paper FAFSA

- Question 53: Divided into a two part (a) and (b) question for clarity



53. Are (a) both of your parents deceased, or (b) are you (or were you until age 18) a ward/dependent of the court?

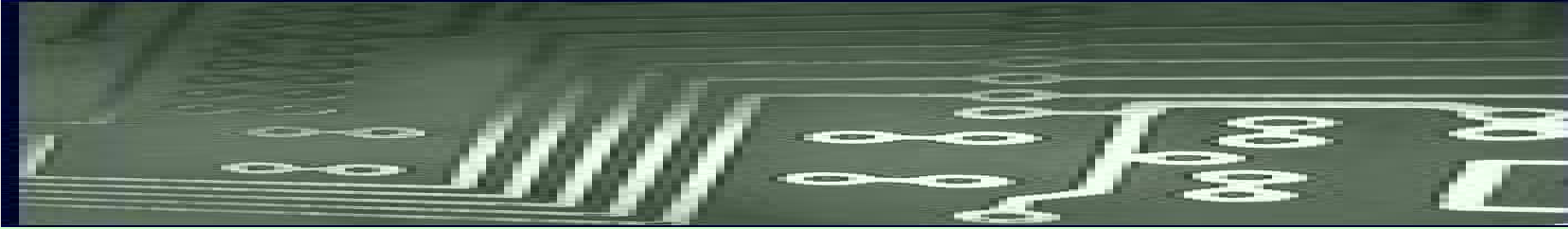
Yes 1



CPS Update

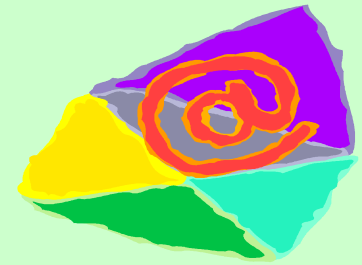
Renewal FAFSA

- Paper Renewal FAFSA eliminated for 2006-07
- All renewal-eligible applicants will receive 2006-07 Renewal Reminder notices (November/December) --
 - E-mail reminder 
 - Paper reminder letter 

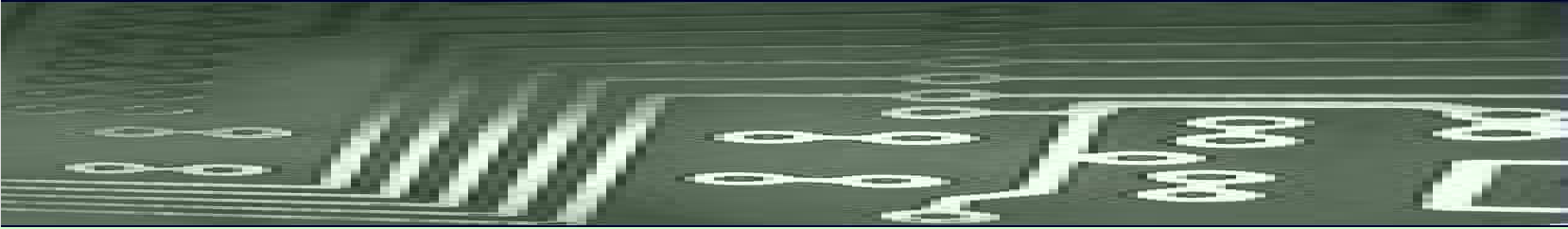


CPS Update

Renewal FAFSA



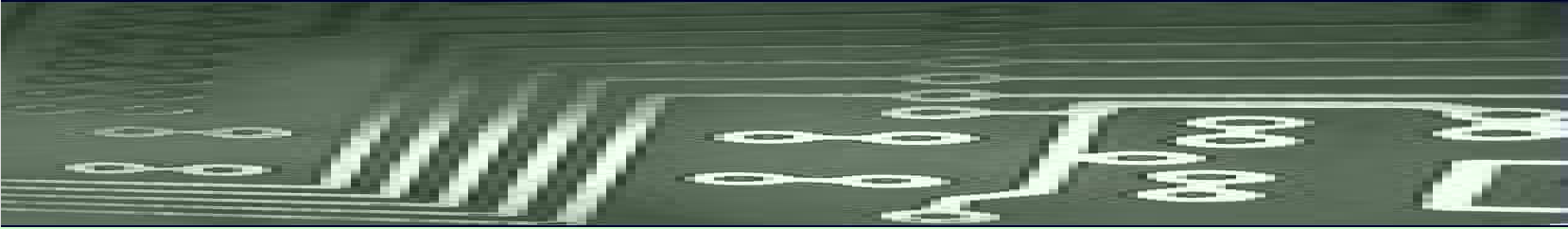
- Reminder e-mails and letters will provide instructions --
 - About how and when to reapply for aid
 - Using Renewal FAFSA on the Web
- Follow-up reminders will be sent the week of February 6, 2006



CPS Update

Edit Changes

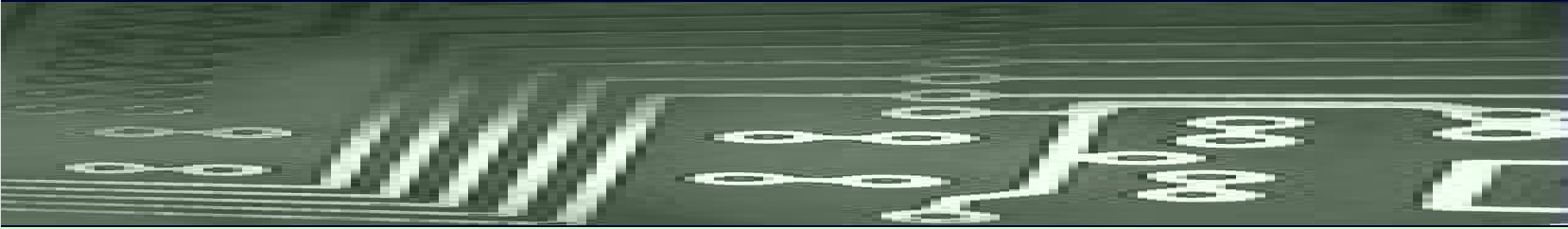
- Parameters changed for cross-year edits
 - Edits check for significant changes in Number of Family Members, Total Income, or Taxes Paid compared to AGI
 - Based on positive results, parameters have been tightened to alert more applicants to inconsistencies
- New warning edit when student or parent enters same amount in asset net worth fields



CPS Update Rejects



- Rejects for name not matching SSA's records (D, E & F)
 - Verifiable rejects
 - If name is correct, student or parent must re-enter both first and last names and submit a correction
 - Changing comment text (Web and SAR) to clarify that both names must be re-entered to override the reject

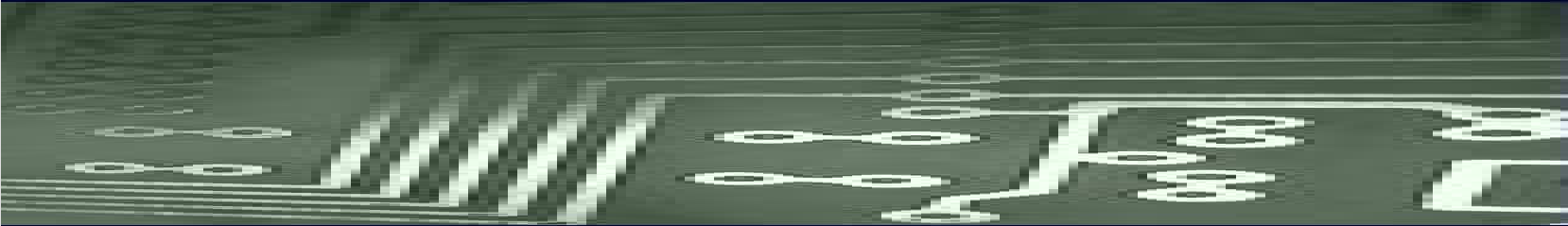


CPS Update

Rejects



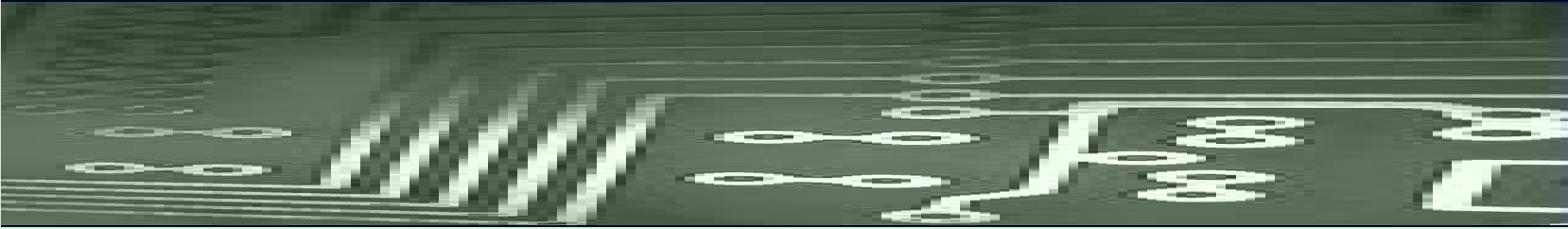
- Rejects 3 and 12 (taxes paid is equal to or greater than AGI)
 - Will continue to allow students to verify data on the Web and receive a rejected SAR
 - FAA will continue to have override capability in FAA Access
 - May want to follow up with students with this reject condition



CPS Update

Database Match Changes

- NSLDS Pre-Screening Match
 - Added new fields to pre-screening records sent to NSLDS to set loan limit flags
 - Dependency status change
 - Graduate status change
 - Grade level change

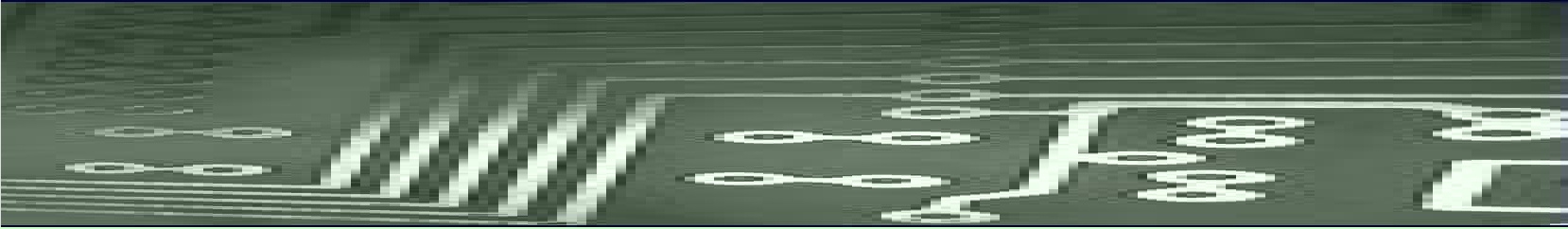


CPS Update

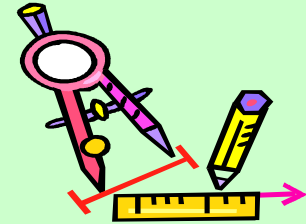
Institutional Student Information Record (ISIR)

- Draft ISIR record layout available on IFAP (ifap.ed.gov)
- ISIR layout will follow order of the FAFSA
- No data element changes
- Date fields incremented
- Deleted Renewal application message classes
 - RADDnnIN
 - EREPnnOP
 - PINRnnOP
- ISIRs available in flat file format only in 2006-07
- XML ISIR implemented in 2007-08

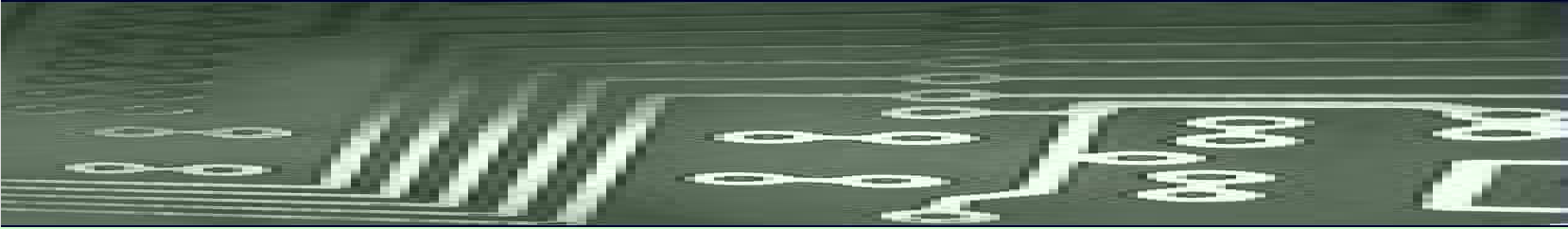




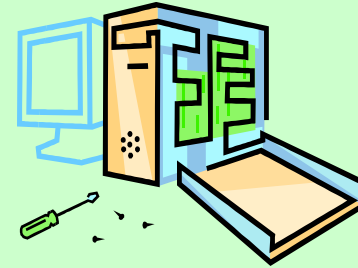
CPS Update Specifications



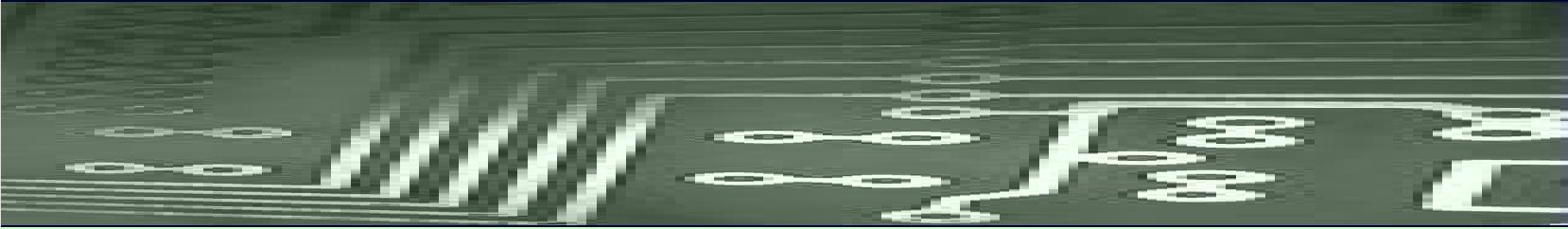
- Draft Software Developer (NAS) Specifications will be posted in August
- Updates will be provided as needed



CPS Update CPS Test System



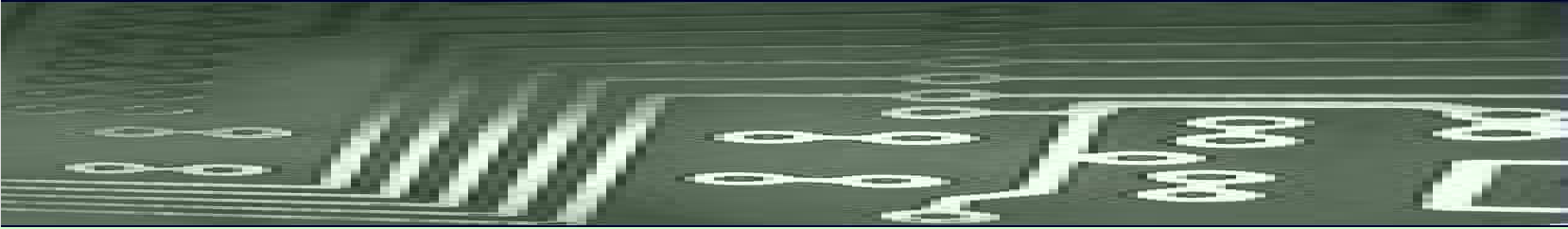
- Mechanism for you to confirm that your system --
 - Meets specifications for interfacing with CPS
 - Is calculating correct results
- Allows you to --
 - Test applications and corrections
 - Receive ISIR data



CPS Update

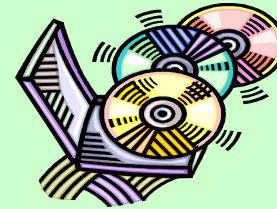
CPS Test System

- Available on November 21, 2005, and remains available through end of processing cycle
- User Guide will be posted to Federal Student Aid download web site (FSAdownload.ed.gov) by end of October
- An Electronic Announcement will be issued when test system goes live

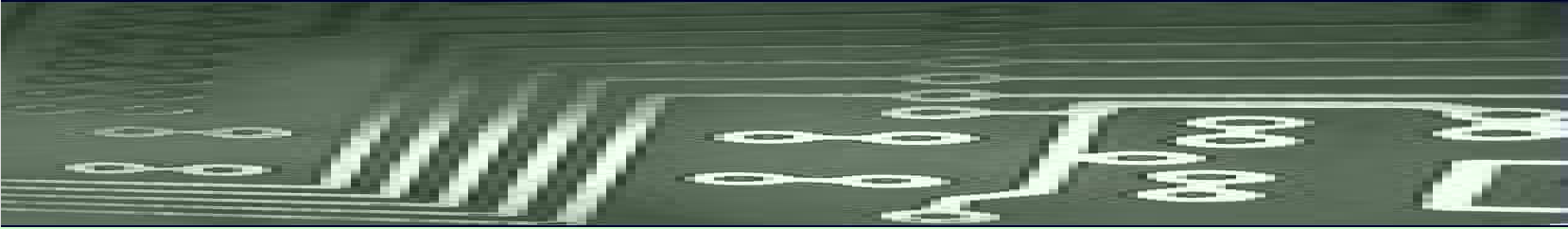


CPS Update

CPS Test System



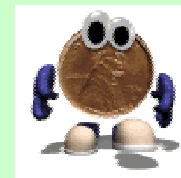
- Test files will be available
- Separate input and output files will be posted for testing specifications
- Remember—CPS is **still in test** until FSA accepts the system and production starts on January 2, 2006

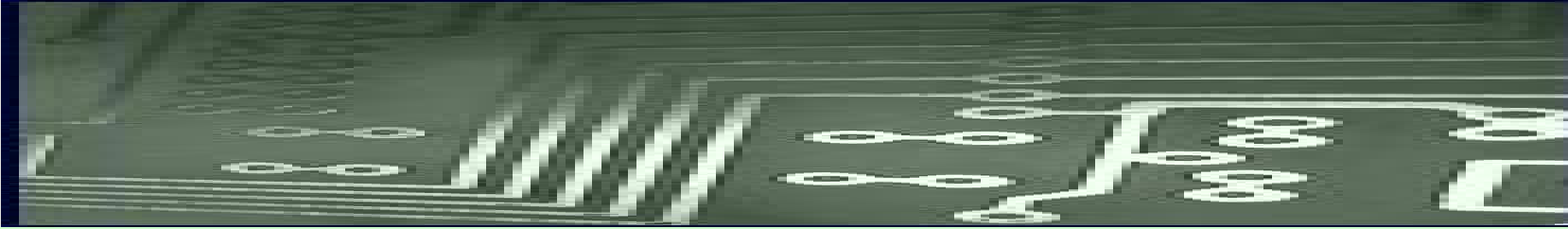


CPS Update

EDEExpress Changes

- All EDEExpress modules will be 508 Compliant (ADA)
 - Global, Apps, Packaging, Pell, and DL
 - Direct Loan Tools
 - SSCR (will be the first product updated)
- Cents will display (when appropriate) in Pell
 - Origination
 - Disbursement
 - Reports





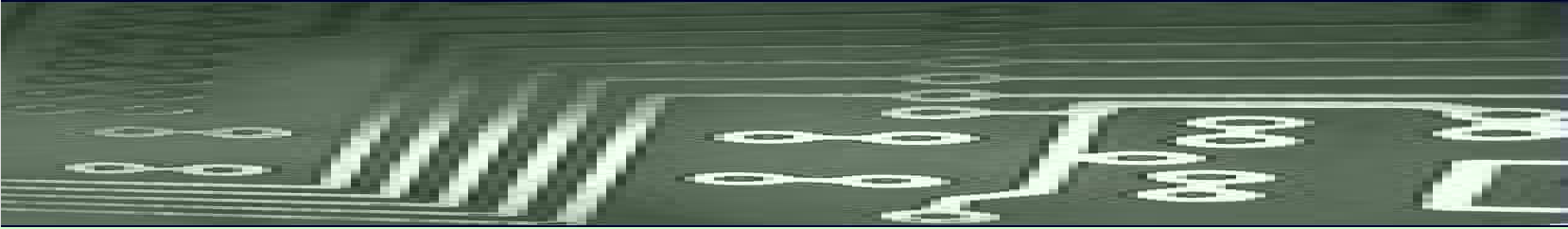
CPS Update

Contact Information

We appreciate your feedback and comments!

Phone: 1-800-330-5947

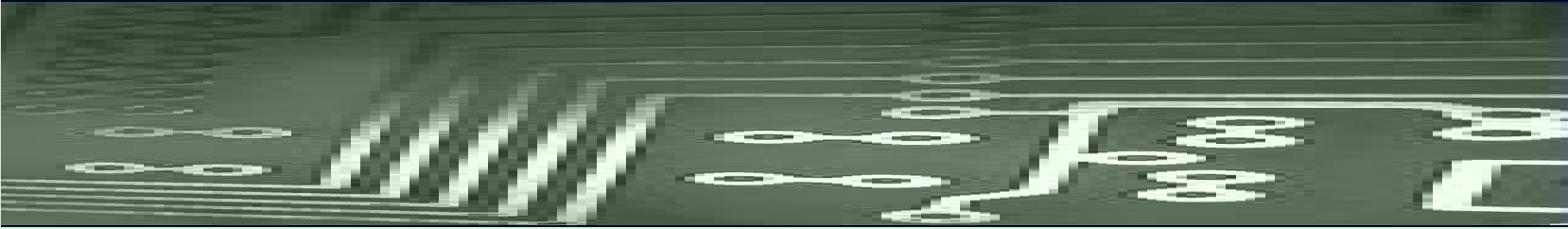
E-mail: cpssaig@ed.gov



XML Update

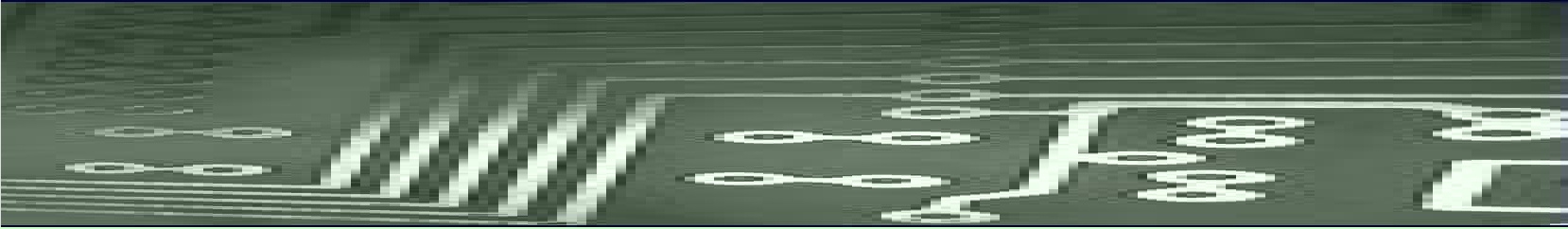
Tim Bornholtz

Senior System Integration Architect



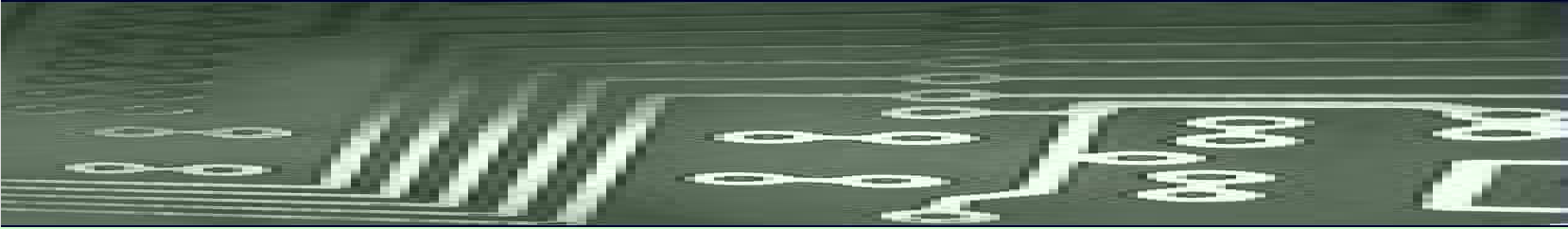
Doing more with XML

Using the XML Registry as a basis
for an FSA enterprise data model



XML Registry & Repository

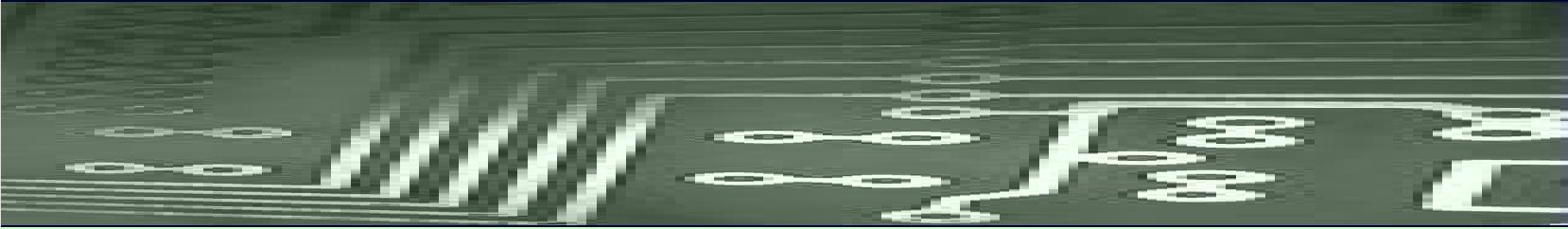
- The Registry is a central access point for
 - XML Core Components
 - XML Schemas
 - Supporting Documentation



XML Registry

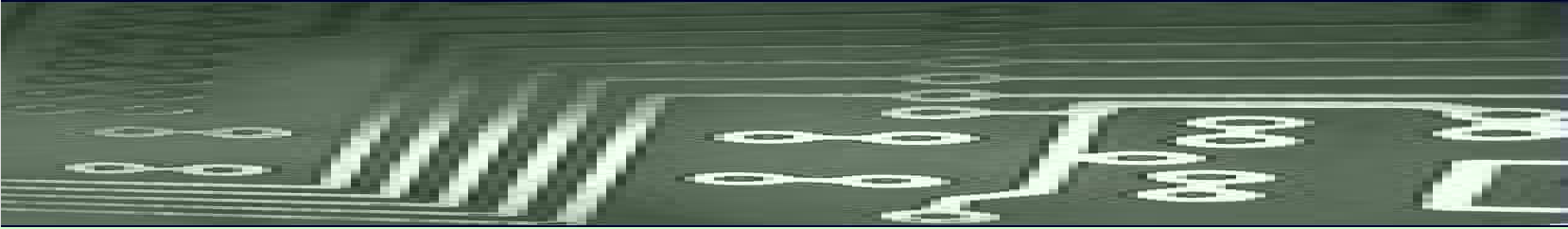
- Everyone can use the data in the Registry
- Many members of the Higher Education community worked collaboratively to create the common definitions and common usage of the core components

But we can use it for more than just schemas!



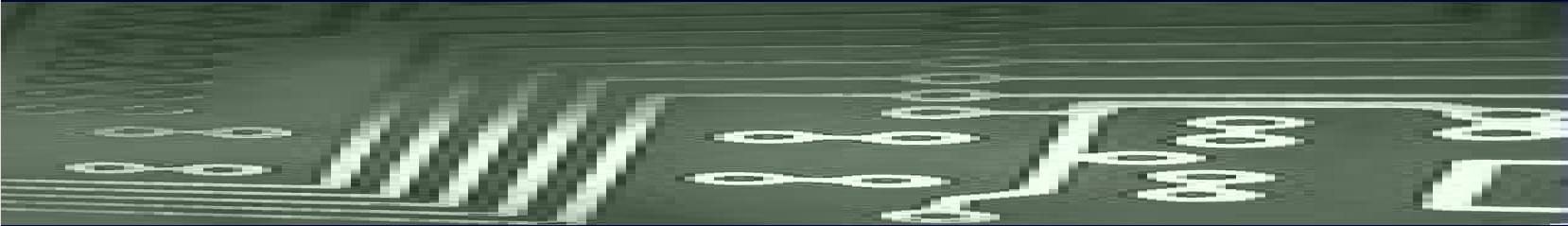
The FSA Landscape

- FSA currently has several legacy systems with:
 - Slightly different definitions of elements
 - Slightly different data sizes
 - Slightly different relationships between elements
- We can use the XML Registry to harmonize these differences across the enterprise by building an Enterprise Data Model



Create an Enterprise Data Model

- Improved understanding of FSA assets
- Standardized naming conventions
- Reuse of FSA assets
- Improved impact analysis
- Reduced development and maintenance time
- Improved compliance with OMB data requirements

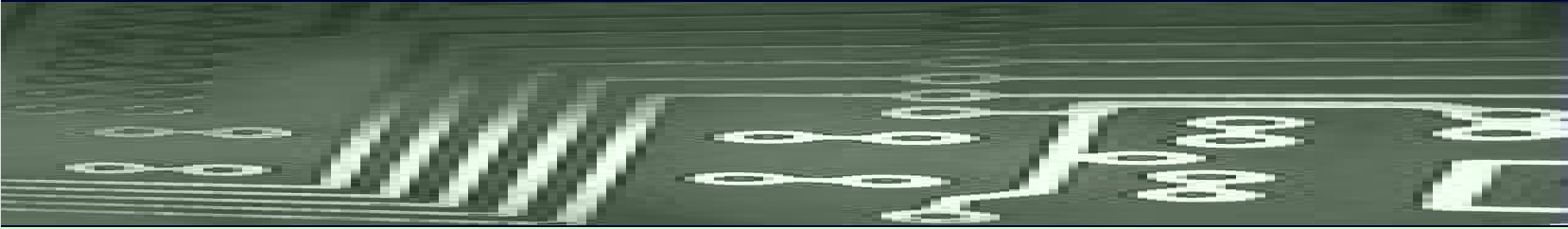


FSA Benefits in real numbers

- 950 Attributes at 20 hours per attribute represents 9 person years worth of effort
 - Reduces Risk
 - Promotes Reuse
 - Saves Time

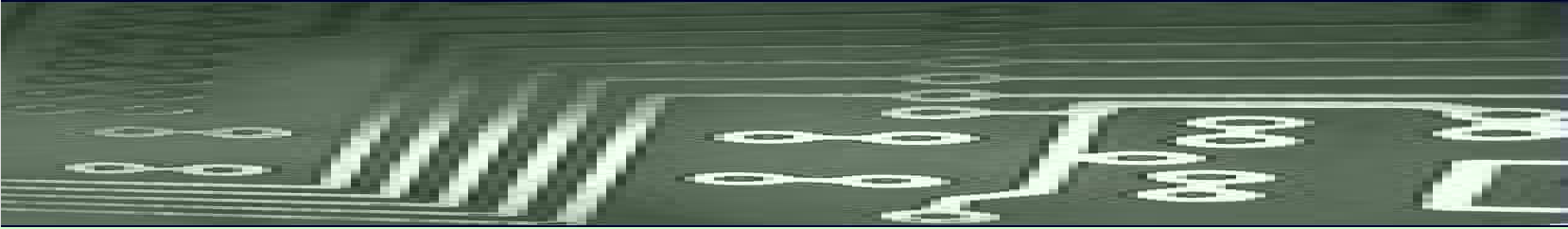
Data is an FSA asset





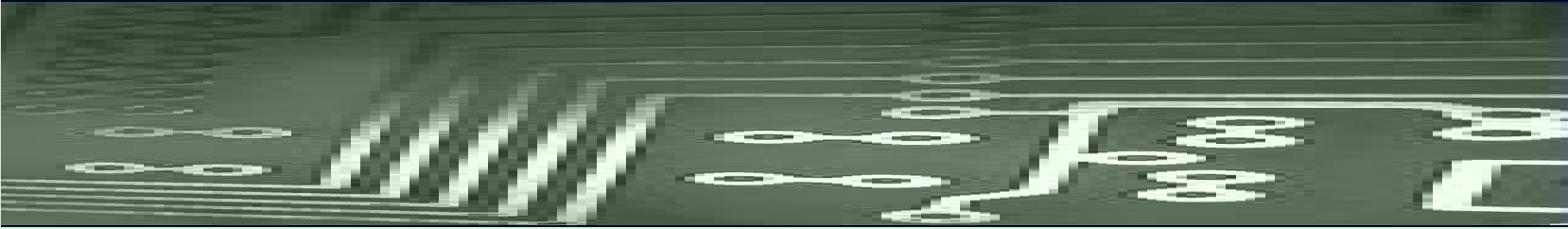
Planning an Enterprise Model

- Reviewed and adopted Department of Education Naming Standards
 - Complies with current PESC XML standards
- Defined and documented the process for registering data models and related metadata into FSA repositories
- Evaluated & adopted the current procedures for registering metadata into XML Registry

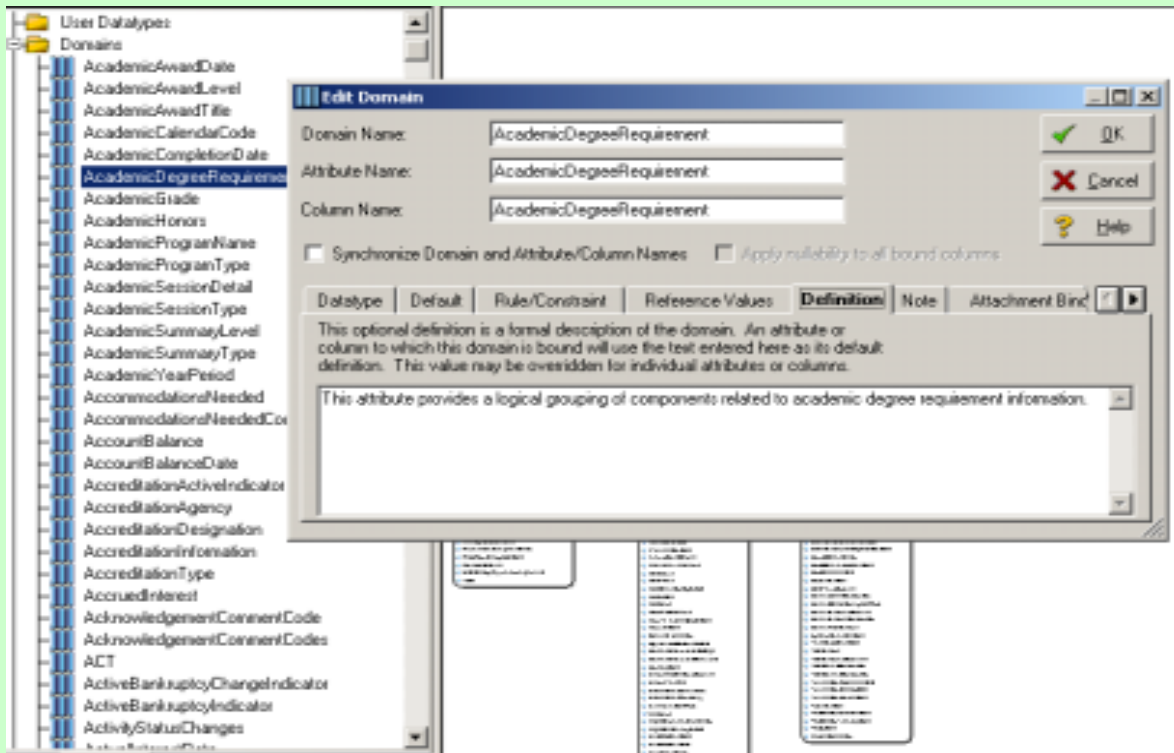


Reusing the Data

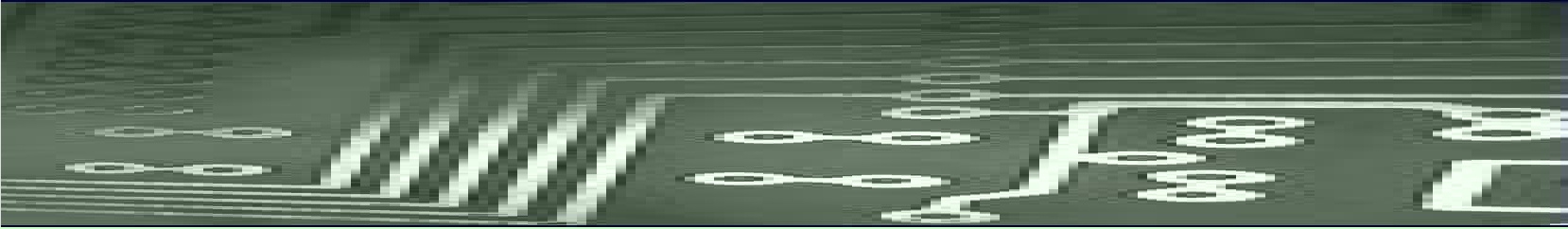
- Created a bridge between XML Repository and our data modeling tool to share data attributes and convert XML Schemas into data models
 - Meta Integration tool bridges the gap between XML Registry & data modeling tool (Embarcadero)
- Converted Common Record and draft ISIR Schemas into a data model & provided to ADvance
- Converted XML Tags into Data Element Encyclopedia for ADvance Data Model



XML Tags as Data Attributes



Over 950 tags converted to data attributes and loaded into our modeling tool

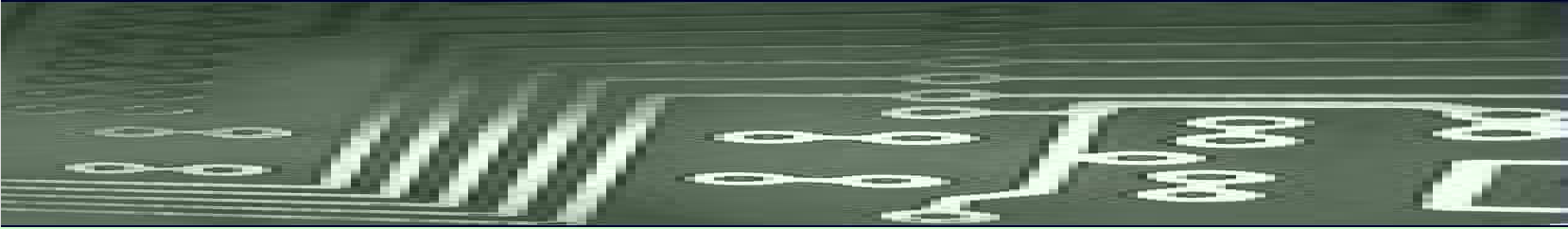


Centrally Managed Code Lists

The screenshot shows the 'Reference Value Editor - [View Mode]' window. The left sidebar lists various code categories, with 'Academic Calendar Codes' selected. The main window has tabs for 'Reference Value', 'Definition', 'Attachment Bindings', and 'Binding Information'. The 'Reference Value' tab is active, showing a text field for 'Reference Value Name' containing 'Academic Calendar Codes' and radio buttons for 'Reference Value Type' set to 'By List'. Below this is a table with two columns: 'Value' and 'Value Description'.

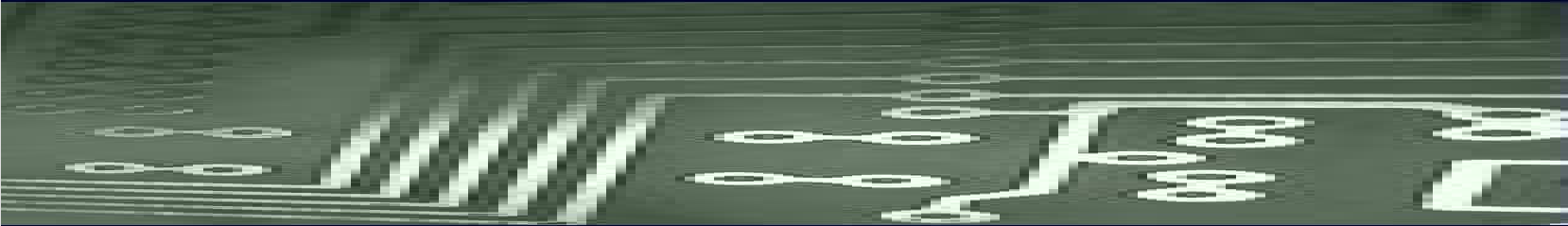
Value	Value Description
1	Credit Hours-non-Standard Terms
2	Credit Hours-Standard Terms of Quarters
3	Credit Hours-Standard Terms of Semesters
4	Credit Hours-Standard Terms of Trimesters
5	Clock Hours
6	Credit hours without terms

664 reference values ranging from country codes to academic calendar codes are available to FSA developers



Data Modeling Process

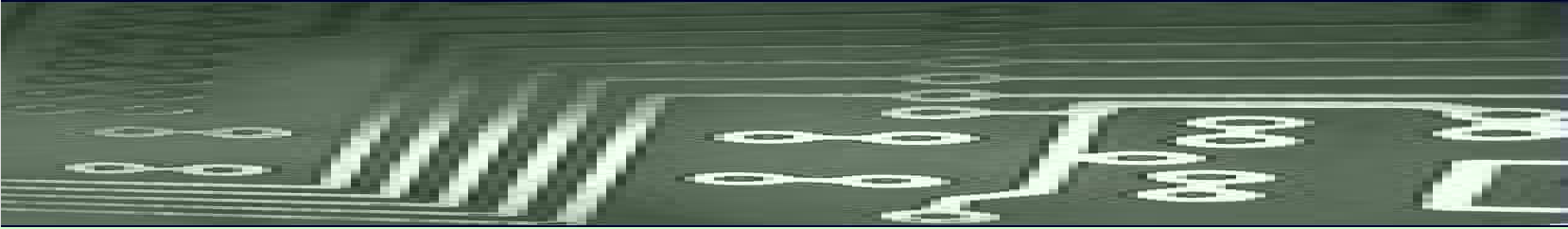
- Started with:
 - Tags registered in XML Registry
 - ISIR XML Schema
- Transitioned to Data Modeling tool which:
 - Created data model & preserved definitions and naming conventions
 - Created scripts for DBA



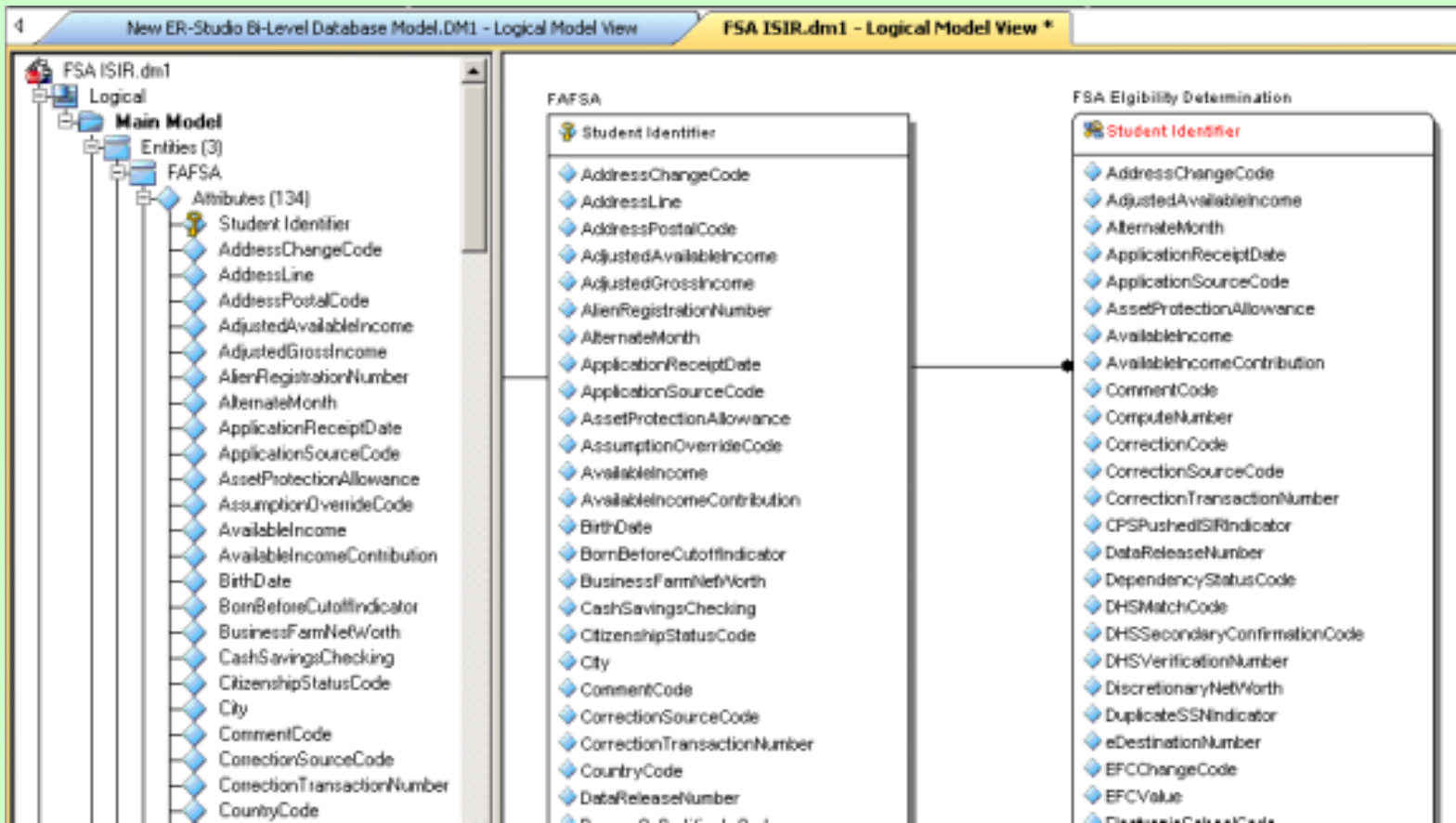
ISIR XML Schema (Draft)

```
<?xml version="1.0" encoding="UTF-8"?>
<!-- edited with XMLSPY v5 rel. 4 U (http://www.xmlspy.com) by Nakia D Leggett
(Proquire LLC) -->
<xs:schema xmlns:xs="http://www.w3.org/2001/XMLSchema"
elementFormDefault="qualified" attributeFormDefault="unqualified"
version="1.0.1">
  <xs:import schemaLocation="FSA_DataTypes_CC_1.0.1.xsd"/>
  <xs:simpleType name="DriversLicenseNumberType">
    <xs:restriction base="xs:string">
      <xs:maxLength value="20"/>
    </xs:restriction>
  </xs:simpleType>
  <xs:simpleType name="DriversLicenseStateType">
    <xs:restriction base="StateProvinceCodeType"/>
  </xs:simpleType>
  <xs:complexType name="DriversLicenseType">
    <xs:sequence>
      <xs:element name="DriversLicenseNumber"
type="DriversLicenseNumberType" minOccurs="0" nillable="true"/>
      <xs:element name="DriversLicenseState"
type="DriversLicenseStateType" minOccurs="0" nillable="true"/>
    </xs:sequence>
  </xs:complexType>
  <xs:complexType name="PersonalIdentifiersType">
    <xs:sequence>
      <xs:element name="SSN" type="SSNType" minOccurs="0"/>

```



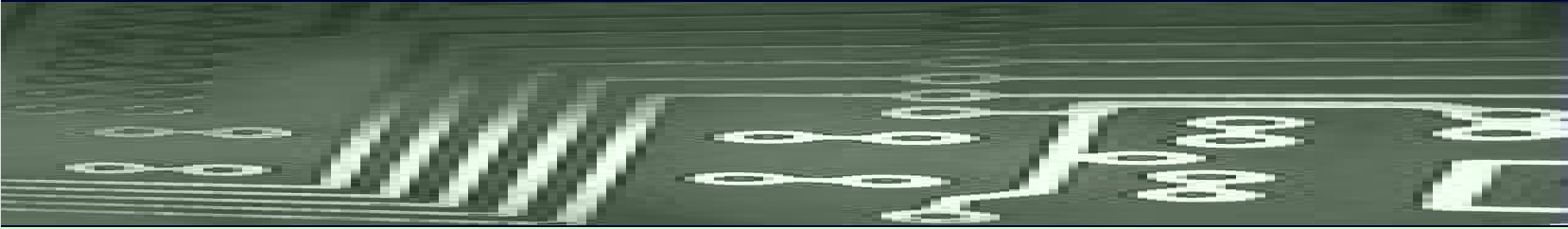
ISIR Data Model





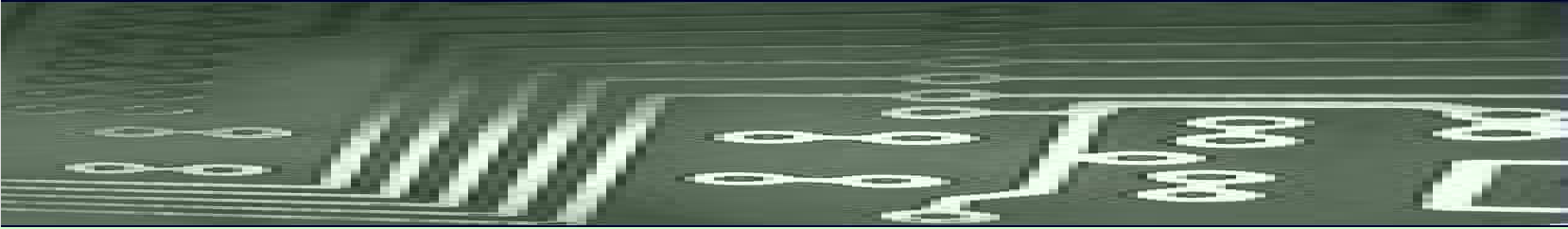
Physical Table Scripts

```
--
--ER/Studio 6.6 SQL Code Generation
-- Project :      FSA ISIR.dml
-- Author :      ""
--
-- Date Created : Tuesday, July 19, 2005 06:40:40
-- Target DBMS : IBM DB2 UDB for OS/390 7.x
--
--
-- TABLE: FAFSA
--
CREATE TABLE FAFSA(
  "Student Identifier"          CHAR(10)          NOT NULL,
  AddressChangeCode            VARCHAR(20),
  AddressLine                   VARCHAR(50),
  AddressPostalCode            VARCHAR(14),
  AdjustedAvailableIncome       VARCHAR(20),
  AdjustedGrossIncome          DECIMAL,
  AlienRegistrationNumber      DECIMAL,
  AlternateMonth               VARCHAR(20),
  ApplicationReceiptDate       DATE,
  ApplicationSourceCode        VARCHAR(20),
  AssetProtectionAllowance     VARCHAR(20),
  AssumptionOverrideCode       VARCHAR(20),
  AvailableIncome              VARCHAR(20),
  AvailableIncomeContribution  VARCHAR(20),
  BirthDate                    DATE,
  BornBeforeCutoffIndicator     SMALLINT,
  BusinessFarmNetWorth         DECIMAL,
```



Primary and Foreign Keys

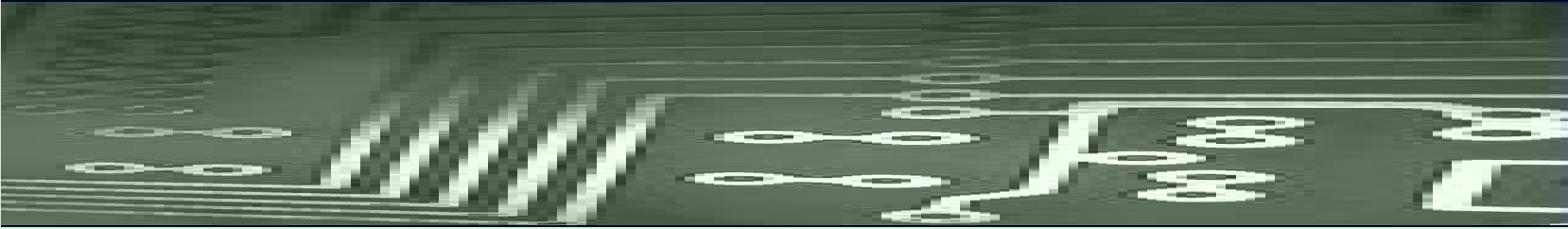
- The XML Registry does not (and will not) contain primary keys and foreign keys
 - XML is a hierarchical format
 - Relationships between elements are determined by the structure



XML Registry at FSA

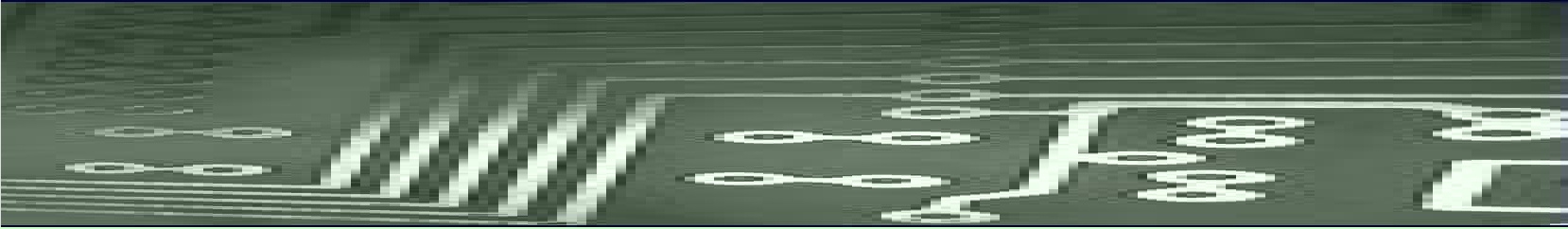
XML Registry, FSA data modeling tools, and enterprise architecture tools provide FSA with:

- The mechanism to define and maintain the Enterprise Data Model for all new or reengineered applications
- A central source of data name definitions, abbreviations and common acronyms
- Enterprise metadata accessible to system developers and other users



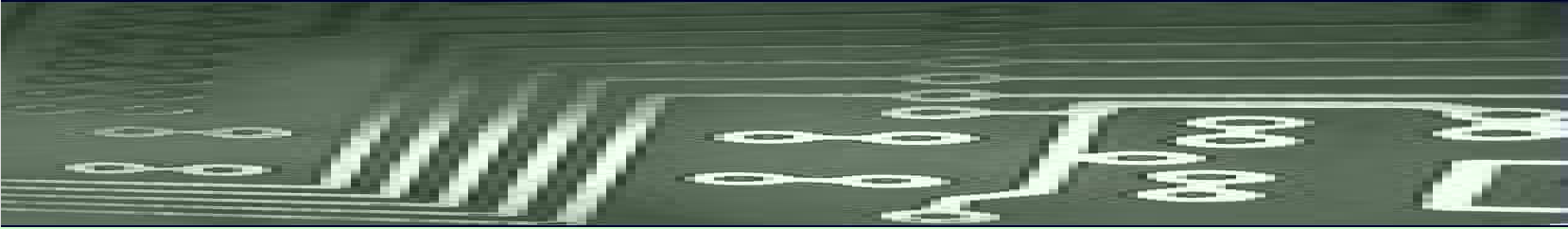
Future Direction

- Expand the data model to include more FSA systems
 - NSLDS
 - IPM/EZ Audit
- Working with ADvance Team to review its Data Models
- Working with Federal Enterprise Architecture Data Reference Model to promote FSA XML Registry and approach



Sharing our work

- Through the xml.gov community, we are sharing the software and data XML Registry
 - IRS
 - Department of State
 - Other federal, state and foreign agencies



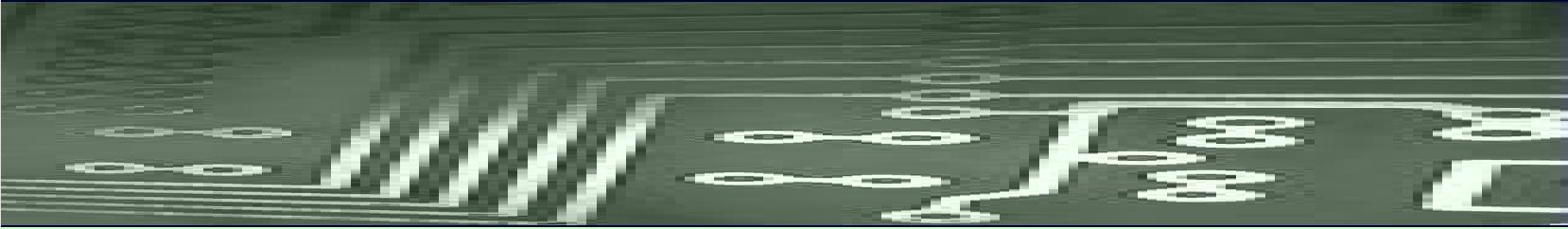
Contact Us

We appreciate your feedback
and comments!

Tim Bornholtz

Phone: 202-377-3465

E-mail: Tim.Bornholtz@ed.gov



Questions and Answers

Our Panel of Experts:

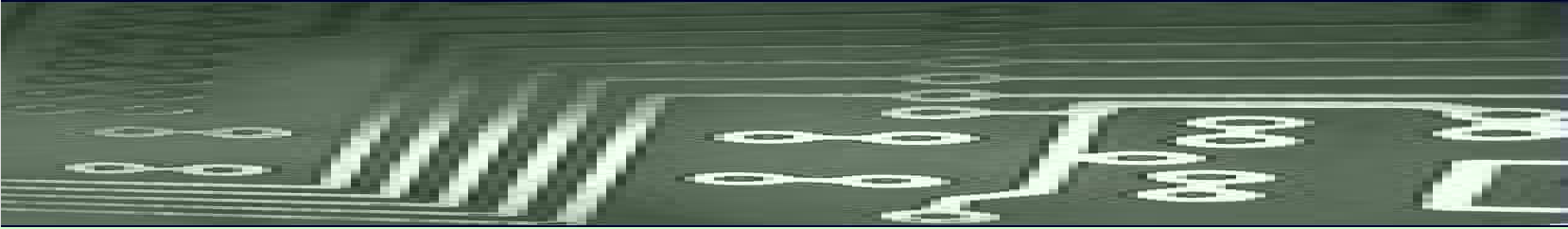
Jim McMahon

Renee Wade

Ron Bennett

Mike Murray

Marilyn LeBlanc



Thank you for attending!

Jerry Schubert

Chief Information Officer

(202) 377-3009

Jerry.Schubert@ed.gov