

April 2010 Updates

TECHNICAL REFERENCE CHANGE TRACKING LOG



Change(s) Made	Page(s)
Volume I, Section 2 – Overview of Changes	
All references to the MyDirectLoan website have been updated to StudentLoans.gov.	I-1-All
New Direct Loan PLUS Program edits 50 and 191 starting June 2010 have been added.	I-2-5
The Iraq Afghanistan Service Grant Indicator has been added to Changes Effective August 2010.	I-2-9
New edits 192,193 and 194 have been added for the Pell Grant Award Program starting August 2010.	I-2-9
Volume II, Section 1– Implementation Guide	
All references to the MyDirectLoan website have been updated to StudentLoans.gov.	II-1-All
All references to the 3.0b schema have been updated to 3.0c.	II-1-All
All references to “Advanced Funded” have been changed to “Advance Funded”.	II-1-All
Timeframe for Generating Disclosure Statements has been updated to 7 days.	II-1-82
All references to “Pushed Cash” as a funding option have been removed.	II-1-91
Net to Gross Calculation has been included in the “Disbursement Net Amount, Disbursement Free Amount and Interest Rebate Amount Calculations” section.	II-1-100
Added DL Unsub Linked, DL Sub Linked, DL Grad PLUS Linked/Unlinked and DL Parent PLUS Linked/Unlinked MPN response samples.	II-1-137 II-1-138 II-1-139 II-1-141 II-1-142 II-1-143
Section on PLUS Application Acknowledgement vs. a Credit Override has been added.	II-1-147 II-1-148
Section on Direct Loan Counseling and a sample Direct Loan Counseling Acknowledgement have been added.	II-1-152 II-1-153
In the sections, “Submitting Pell Grant, ACG and National SMART Grant Disbursement Information and Disbursement Release Indicators,” updates have been made to the Business Rules in regards to the Disbursement Date range.	II-1-164 II-1-191 II-1-205
Volume II, Section 2 – Message Classes	
DL PLUS Application Acknowledgment message class has been updated to CRSP110P.	II-2-9
Entrance Counseling message class has been added.	II-2-9
Volume II, Section 3 – Common Record Layout	
The Financial Award Amount and Disbursement Amount “Format and Valid Field Values” description for Pell have been updated to adhere with the updated Pell Payment Schedule.	II-3-20 II-3-29

Change(s) Made	Page(s)
Field 93 "Format and Valid Field Values" has been updated.	II-3-26
All valid values for DL Entrance Counseling types have been added to field 96.	II-3-27
The Pell Grant, ACG and National SMART "Format and Valid Field Values" have been updated in Field 104.	II-3-30
Field 133 has been updated to <ApplicationLoanAmount>.	II-3-35
The "Max Length", "Data Type" and "Format and Valid Field Values" columns for Fields 137 and 174 up been updated to "NA", "boolean" and "true/false".	II-3-35 II-3-40
Field 162 <DocumentTypeCode> has been updated to include Entrance Counseling.	II-3-39
Field 174 has been updated to <EntranceCounseling>.	II-3-40
Volume II, Section 4- Edits	
The following edits have been updated to include a "Perkins" note in the Award Types Column: 001,003,004,005,006,007,008,34,35,43,45,46,48,50,59,67,70,73,74,81,83,84,85,86,87,88,90,100,102,105,111,118,119,149,153.	
Edit 002 has been updated to no longer include TEACH and Perkins.	II-4-3
Edits 012, 014, 024 and 025 have been modified for Release 9.1(IASG and Foreign Schools) and now include DL PLUS.	II-4-4 II-4-5 II-4-7
Edit 015 has been removed.	II-4-5
Edit 038 has been updated to no longer include ACG and SMART.	II-4-10
Edit 050 has been updated to include Foreign Schools.	II-4-14
Edit 051 has been updated to read 7 calendar days for the Pell Allowable Window for Advanced Pay. Also the reference to Pushed Cash under the Direct Loan/Perkins Allowable Window has been removed.	II-4-14
Edits 63, 77 and 78 have been updated to only be triggered on a maintenance record.	II-4-17 II-4-21
Edit 92 has been updated.	II-4-22
Edits 140 and 142 have been updated to no longer include PLUS.	II-4-28 II-4-29
Edit 166 has been updated to include ACG and SMART.	II-4-33
Edit 191 has been added.	II-4-36
Edits 192, 193, 194 have been added.	II-4-36 II-4-37
Edit 996 has been updated to no longer be returned on PLUS and Grad PLUS disbursements if incorrect origination fees are submitted on the disbursement.	II-4-37
Volume V, Section 1 - COD School Testing Guide	
Link to the 3.0c schema on the IFAP website has been updated.	V-1-5
In the description for the Field Name, "Funding Type", the reference to "Pushed Cash" has been deleted.	V-1-18
Volume V, Section 2- COD Test Cases	
The entire document has been updated to adhere to all current 2010-2011 information.	V-2-All

Change(s) Made	Page(s)
Volume VI, Section 1 – Glossary of Terms	
Reference to “Pushed Cash” under the “Actual Disbursement Record” definition has been removed.	VI-1-5
The definition of “Additional Eligibility Indicator” has been added.	VI-1-5
Volume VI, Section 2– Funding Methods	
All references to “Advanced Funded” have been changed to “Advance Funded”.	VI-2-All
All references to “Pushed Cash” as a funding option have been removed.	VI-2-All
Business Rule #8 under “Advance Funded” has been updated to include all Schools.	VI-2-4
Business Rule #1 under “Cash Monitoring 2 (HCM2)” has been updated to include Direct Loan.	VI-2-5
Business Rule #1 under “Reimbursement” has been updated to include Direct Loan.	VI-2-6
Direct Perkins Loan has been removed from Business Rule #4 under “Reimbursement”.	VI-2-6
The “Relationship between Direct Loan Processing Option and Funding Methods” chart has been updated to include two new rows, “Advance Funded with HCM2 Review Status” and “Advance Funded with Reimbursement Status”.	VI-2-7
Volume VI, Section 3– Pell Payment Schedule and Calculation Table	
The new link to the 2010-2011 Pell Grant Payment Schedule has been added.	VI-3-2
Changes for the 2010-2011 Award Year and forward have been included.	VI-3-4
Volume VI, Section 6 – XML Examples	
All XML examples have been updated and verified to follow the common record layout.	VI-8-All
The new Lifetime Eligibility Used tags have been updated with the correct format.	VI-6-11 VI-6-16 VI-6-18 VI-6-20
Direct Loan Entrance Counseling Acknowledgement example added.	VI-6-36
Plus Application Acknowledgment example added.	VI-6-38
Volume VI, Section 8 – Reports	
All references to “Pushed Cash” have been deleted. Side notes about this funding option have also been included.	VI-8-All
The CVS layout for Pell SSN Name DOB change report has been added.	VI-8-48
The TEACH PDL report has been updated to notify that it will display a Schools full eight digit OPE ID.	VI-8-141
In the Section, “Direct Loan School Account Statement (SAS)” business rule #4(d) has been updated.	VI-8-169
An updated Sample DL 30-Day Warning Report Mockup has been added.	VI-8-214
In the both ACG and National Smart Grant Trailer Record Layout’s, the Field Name for position 76 has been updated to “Sign Indicator”.	VI-8-73 VI-8-100

June 2010 Updates

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Change(s) Made	Page(s)
Volume I, Section 2 – Overview of Changes	
Modifications to COD for 2010 - 2011 Citizenship Status Processing	I-2-5
Revised 2010-2011 Federal Pell Grant Payment and Disbursement Schedules	I-2-7
Modifications to Edit 60	I-2-7
Volume II, Section 1– Implementation Guide	
PLUS Application Acknowledgement with credit override XML Example	II-1-147
Parent PLUS Application Acknowledgement with Endorser XML Example	II-1-150
Linked ATS Acknowledgment XML Example	II-1-238
Unlinked ATS Acknowledgment XML Example	II-1-238
Volume II, Section 3 – Common Record Layout	
Award Information, Field 68 <EntranceCounseling> tag has been added.	II-3-19
Field 69, <DefaultOverPayCode> listed as “Required” for Direct Loan PLUS.	II-3-19
The Format and Valid Field Values for Field 118, <MPNStatusCode> has been updated.	II-3-31
The Format and Valid Field Values for Field 131, <CreditOverrideCode> has been updated.	II-3-33
The Format and Valid Field Values for Field 136, <CreditActionChoice> has been update.	II-3-33
The Format and Valid Field Values for Field 175, <EntranceCounseling> has been updated.	II-3-40
Volume II, Section 4– Edits	
Edit 166 now only applies to the TEACH Grant.	II-4-32
Edit 179 has been removed.	II-4-34
The Condition for Edit 181 has been updated.	II-4-34
Volume III, Section 2 – Combinations System Message Classes	
Updated the COD System Data Types to include the message class CRSP11OP for the Direct Loan PLUS Application Acknowledgment file.	III-2-4
Volume III, Section 3 – Combinations System Record Layouts	
In the Direct Loan External Import Loan Origination Add File record layout, the 5 th through 20 th Anticipated Disbursement date fields (fields 61 to 76, positions 475 to 602) were updated to remove references indicating that these fields were only applicable for subsidized and unsubsidized loan records.	III-3-29 to III-3-30
In the Direct Loan External Import Loan Origination Add File record layout, the PLUS Application ID	III-3-32

field (field 83, positions 698 to 707) was added. The record layout increased to 707 bytes.	
In the Direct Loan, Origination External Import Change Field Numbers (sorted by Field Name Alphabetically and sorted by DL Change Number), the 5 th through 20 th Anticipated Disbursement date and gross amount fields (DL Change Numbers S130 to S191) were updated to remove references indicating that these fields were only applicable for subsidized and unsubsidized loan records. In addition, the Disbursement Number field (DL Change Number D003) was updated to indicate that disbursement number 1 to 20 is applicable for all loan types.	III-3-38 to III-3-40 III-3-53 to III-3-55
In the Direct Loan, Origination External Import Change Field Numbers (sorted by Field Name Alphabetically and sorted by DL Change Number), the PLUS Application ID (P012) field was added.	III-3-44 and III-3-48
In the Direct Loan External Export section, the following PLUS Application fields were added: <ul style="list-style-type: none"> • Application Complete Date • Application ID • Application Loan Amount • Credit Action Choice • Credit Appeal Status • Credit Balance Option • Credit Decision Expiration Date • Deferment Option • Maximum Loan Indicator • Original Credit Decision Status In addition, the valid field content was updated with PLUS Application information for the following fields: <ul style="list-style-type: none"> • Record Source • Record Source - DL 	III-3-61 to III-3-69
In the Direct Loan External Export section, the field length of the Actual Disbursement Reject Codes field was corrected from 21 to 28 bytes.	III-3-70
Volume III, Section 4 – Combinations System Edits	
Removed Direct Loan Edit 4000 to allow more than four disbursements for PLUS and Grad PLUS loans.	III-4-20
Volume VI, Section 3 – Pell Payment Schedule and Calculation Table	
The link to the Revised 2010-2011 Federal Pell Grant Payment and Disbursement Schedules has been added.	VI-3-2
Volume VI, Section 8 – Reports	
New Sample Direct Loan Inactive Loans Report Mockup	VI-8-218
In the Direct Loan Rebuild Origination Detail Record, a new value of “E” has been added for field 124.	VI-8-242

August 2010 Updates

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Change(s) Made	Page(s)
Volume VI, Section 9 – Rigorous Secondary School Programs of Study, and Eligible Majors	
Added new CIP codes to the list of eligible majors for the 2010-2011 award year.	VI-9-10 To VI-9-24