



SPRING CONFERENCE

Kansas City, Missouri

2003



Session 29

Common Record Update

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The Common Record-COD

- **Concept of consistent data packet layout across programs (Pell, DL, FFEL, Campus-based).**
- **Concept of consistent data packet layout across major stakeholders (FSA, CommonLine, Meteor).**

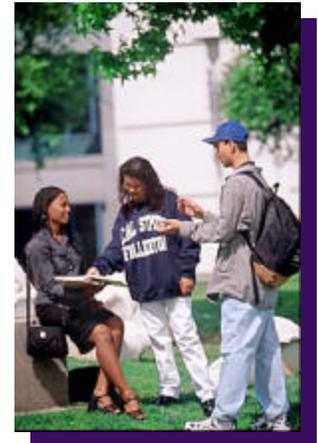
The Common Record-COD

- **Core Components Dictionary – PESC**
- **Schemas**
 - **Common Record**
 - **Common Record – COD**
 - **Common Record – FFEL and Alt**
 - **Common Record – ISIR**



The Common Record-COD

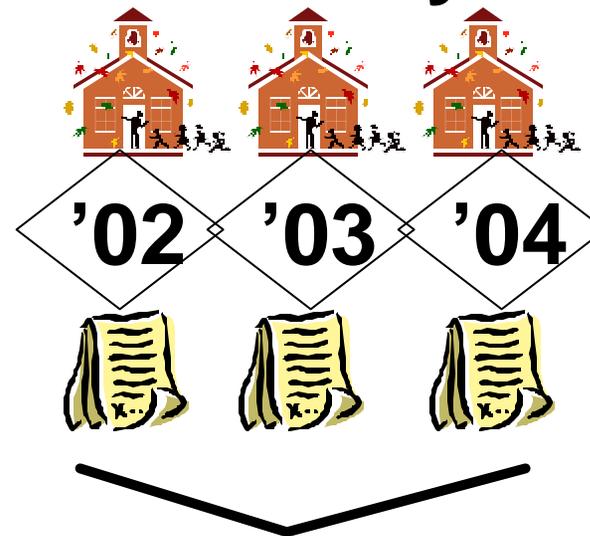
- **Format is student-centric, showing data for multiple financial aid programs in one student complex element**
- **The entire common record or only those portions of the common record which changed can be transmitted**
- **XML allows the Common Record to be easily changed (extensible)**
- **Format is human-readable, facilitating problem solving**



The Common Record-COD

■ Document Structure allows you to send data for:

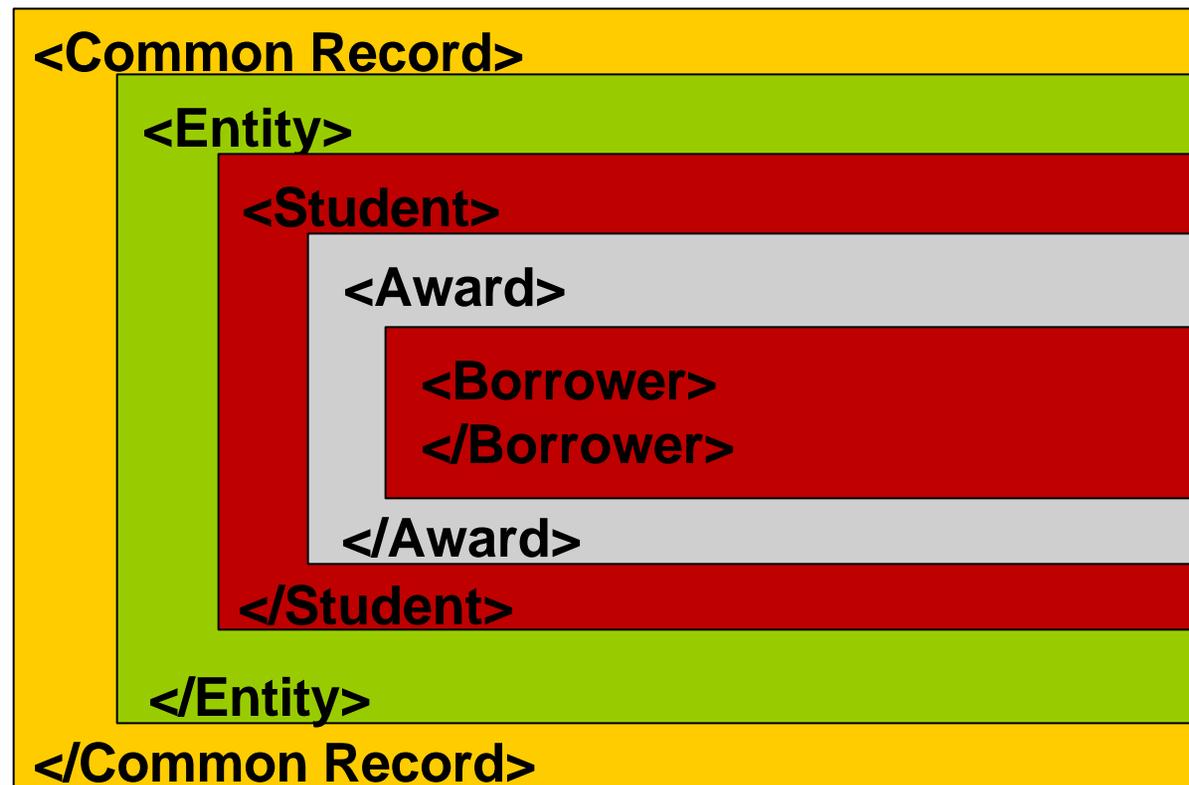
- Multiple Schools
- Multiple Years
- Multiple Awards



In **ONE** Transmission!

1

The Common Record–COD *Schema Structure*



XML: The Technology Solution

Why did FSA Adopt XML?



- **XML** is technology-neutral allowing trading partners to use different technologies in their own applications
- XML allows schools to use one **Common Record** between disparate databases or different systems
- XML allows users to **share information seamlessly**
- XML is **future-oriented**

XML: The Technology Solution

- XML is the **standard language** of e-business and the internet
- XML lets the industry **describe virtually any type of data** and deliver it across a network
- **XML** would allow for **easy inclusion** of other student financial resource data (FFEL, ISIR, State Grant, etc.)

XML: The Technology Solution

XML Bridges the Technology Gap



The Common Record for FFELP & Alternative Loans

- 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





The Common Record for FFELP & Alternative Loans

Progress Report

- November 11, 2002
 - Detailed presentation of proposal to schools, SIS vendors and service providers



The Common Record for FFELP & Alternative Loans

Progress Report

- Collaboration continues to move us forward!
 - Schools, The College Board, Datatel, SCT Corp., PeopleSoft, and Sigma Systems have all indicated their support of the ESC proposal



The Common Record for FFELP & Alternative Loans

Progress Report

- Documentation development has begun!
 - First draft for public review – April 2003
 - Final documentation due – July 2003

Reengineering Proposal

- Streamlining the Application and Disbursement Processes
 - All records sent in a single file
 - Pre and Post guaranty changes can now be sent together
 - Routing is at the record level

Reengineering Proposal

- Streamlining the Application and Disbursement Processes
- Moving from Transaction Based to End Result Based Changes
- Support of Real Time Functionality in an XML Based Record

Reengineering Proposal

- Example – pre-disbursement cancellation:
 - In the CLR5 process:
 - Change Type Code**
 - Loan Type Code**
 - Disbursement Identification Number**
 - Disbursement Date**
 - Cancellation Date**
 - Cancellation Amount**
 - Revised Disbursement Amount**

Reengineering Proposal

- Example – pre-disbursement cancellation :
 - In the reengineered process:

LoanAmount	(new value)
DisbursementNumber	(old value)
DisbursementAmount	(zero)
CancellationDate	(new value)

Proposed Implementation Schedule

- 4/1/2003 – First draft of documentation
- 7/1/2003 – Final documentation completed
- 12/1/2003 – Testing begins
- 4/1/2004 – Implementation begins

Next Steps for FFELP

- Finalize schema development
- Finalize documentation development
- Training, education and outreach!

Contact Information

Electronic Standards Committee Page:

www.nchelp.org

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NCHELP

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Overview of PESC

Industry Relationships

Current Activities

Additional Info & Resources

Mission

Established in 1997 and located in Washington, D.C., PESC is a non-profit association of colleges and universities; professional and commercial organizations; data, software and service providers; and state and federal government agencies.

PESC's mission is to guide the higher education community in leveraging the value of electronic standards for data exchange with the overall goal of improving service, controlling costs, and attaining interoperability.

PESC supports and promotes the use and adoption of existing electronic standards set through official standards-setting bodies, as well as open industry collaborations, and sets new industry standards where there are no national or international bodies to do so.

Board of Directors

Michael Berberet	NCS Pearson
Steve Biklen	NASLA
Jerry Bracken	AACRAO
Judith Flink	University of Illinois @ Chicago
Mark Jones	National Student Clearinghouse
Jackie Kessler	SCT
Dallas Martin	NASFAA
Keith Riccitelli	Sallie Mae
Michael Sessa	PESC



Overview of PESC

Members

AACRAO, American Education Services, Campus Management Corporation, Citibank, COHEAO, CollegeBoard, Datatel Inc., Educaid, ELM Resources, George Washington University, Miami-Dade Community College, Miami University, NASFAA, NASLA, National Student Clearinghouse, NCS Pearson, Northern Illinois University, Oracle, Purdue University, Sallie Mae, SAP, SCT Corporation, SLSA, Temple University, University of Illinois at Chicago, University of Miami at Coral Gables, University of Minnesota, University of Northern Iowa, University of Texas at Austin, University of Wisconsin at Madison, USA Funds, US Department of Education, Virginia Polytechnic Institute

⇒ Affiliates

ACT Inc, ACE, EdFund, EFC, EDUCAUSE, infiNET Solutions, Lumina Foundation, NACUBO, NCHELP, RDA Corporation, SIF



Overview of PESC

Annual Schedule

Board Meetings	Monthly
Membership Meetings	Twice per year
XML Forum for Education	Quarterly <i>(fall meeting held in conjunction with AACRAO's Technology Conference)</i>
Annual Conference	May <i>(held in conjunction with EFC's annual Technology Conference)</i>

**US Department of Education –
Office of Federal Student Aid**

AACRAO's SPEEDE Committee

NCHELP's ESC Committee

ANSI X12

EFC

Industry Relationships

Web Services Workgroup

Single Institutional ID

Workgroup

XML Postsecondary

Transcript

Common Record

XML Postsecondary Transcript

- **Summer 2002:** version 0.01 released for public comment
- **Winter 2003:** version 1.0 submitted to ANSI ASC X12
- **Spring 2003:** presented at AACRAO's annual conference
- **Fall 2003:** presented at EDUCAUSE's annual conference

Common Record

- **2002:** launched by FSA for Pell, Direct Lending, and Campus-Based*
- **2003:** FFELP and Alternative Loan schemas developed
- **2004:** FFELP and Alternative Loan service providers implement expanded Common Record

Common Record

FAFSA - ISIR

Certification

MPN

Guarantee

Disbursement

Changes

Graduation

Repayment

Payoff

Consolidation

Deferment

Forbearance

Sales

Delinquency

Cure - Claim

Subrogation

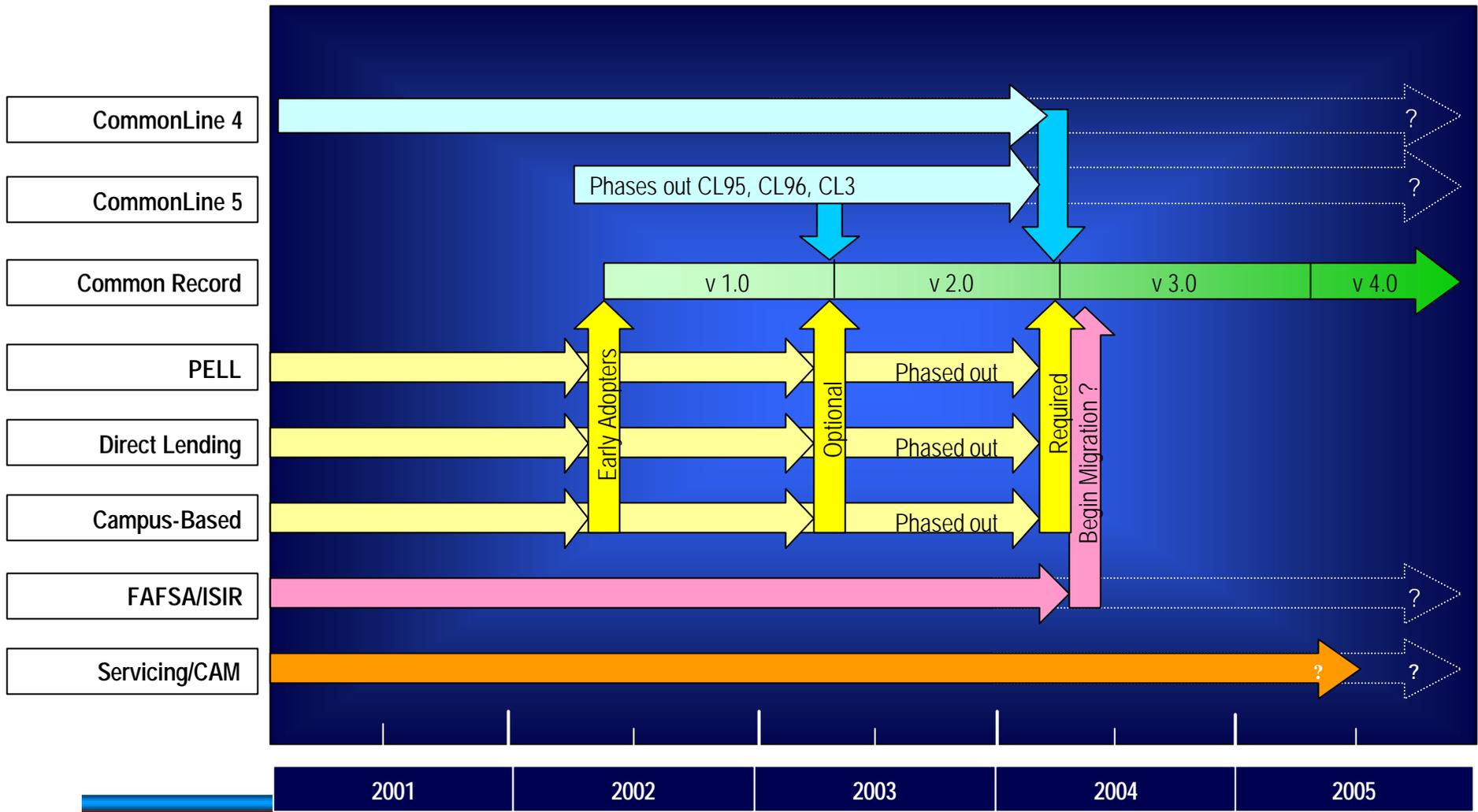
NSLDS

799 - LARS

Life of the Loan



Common Record





Additional Info

www.StandardsCouncil.org

The Standard

PESC Annual Conference

May 7-8, 2003

Comments, Questions, Feedback, and Contact Information



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Kansas City, Missouri

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