

Session 19



What's New for Pell Processing for 2005-2006

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Hot Topics

- Full Participant Status
 - Outreach
 - Signup
 - Prior Year Phase-In Record Processing
 - Discontinued Phase-In Message Classes
- Extensible Markup Language (XML) Schema Processing
- Unique for Pell
- Edits
- COD School Relations
- Pell Update

Full Participants

All schools will be required to process as Full Participants using the XML Common Record in 05/06



Outreach

- ❑ Are You Ready?
- ❑ COD has begun an outreach program to ensure all Phase-In schools will be XML compliant in 05/06.
- ❑ For additional information, please refer to the Federal Register announcement issued on 9/14/04:

<http://www.ed.gov/legislation/FedRegister/other/2004-3/091404b.html>

Signup

- Phase-In schools must mail or fax a Full Participant Request Letter to the COD School Relations Center as soon as possible.
- For additional information, please refer to the electronic IFAP Announcement issued on 8/6/2004:

<http://ifap.ed.gov/eannouncements/0806CODFuIIParticReq0506.html>

XML Resources

- ❑ Information on XML can be found in the following references:
 - www.w3c.org
 - www.ebxml.org
 - www.oasis-open.org
 - www.xml.com
 - XML Journal <http://sys-con.com/xml/>
 - www.xfront.com
- ❑ Contact the COD School Relations Center or Holly.Hyland@ed.gov if you need XML Assistance.

Phase-In Record Processing

- ❑ COD will no longer process Phase-In Participant fixed-length, flat-file records for 05/06 award year and forward.
- ❑ COD will continue to process applicable Pell and Direct Loan Phase-In Participant records for prior award years.
- ❑ COD will continue to produce reports in the same format.

Discontinued Phase-In Message Classes

Program	COD will not accept the following message classes	COD will not return the following message classes
Pell	PGOR06IN PGDR06IN	PGOA06OP PGOP06OP PGDA06OP PGDW06OP

Hot Topics

- Full Participant Status
- XML Schema Processing
- Unique for Pell
- Edits
- COD School Relations
- Pell Update

XML – Schema Processing

- ❑ For 05/06, the COD Common Record schema will not change. COD will continue to use our existing Common Record schema v2.0d.
- ❑ COD is modifying how it populates the namespace attribute in the Common Record tag in Common Record Response documents:

<CommonRecordxmlns=<http://www.ed.gov/FSA/COD/2004/v2.0d>>

XML – Schema Processing

- ❑ COD will return in Common Record Response documents the value that was submitted to COD in the Namespace attribute, essentially “echo-ing” back the Namespace.
- ❑ For system-generated responses, COD will populate the Namespace attribute with the latest version of the XML Schema released for each award year
 - 2003-2004 2.0c
 - 2004-2005 2.0d
 - 2005-2006 2.0d

Hot Topics

- Full Participant Status
- XML Schema Processing
- Unique for Pell
 - Secondary Expected Family Contribution (EFC)
 - ESOA with ACA
 - Award Year on Correspondence
- Edits
- COD School Relations
- Pell Update

Secondary EFC Indicator

- ❑ The Secondary EFC should no longer be used to pay a Pell award.
- ❑ COD will ignore the Secondary EFC Indicator tag if submitted on an incoming record and will instead edit the award amount using the Primary EFC.
- ❑ COD will not return the Secondary EFC Indicator tag in the response record if submitted on the incoming record.
- ❑ Edit 026 will ***no longer*** be returned.
 - This edit ensured the reported Secondary EFC Used Code was a valid value

ACA ESOA Generation

- ❑ The Electronic Statement of Account (ESOA) will be generated and sent to schools when they receive an Administrative Cost Allowance (ACA) payment for their students.
- ❑ Message Class – PGAS06OP

Adding Appropriate Award Year to Correspondence

- ❑ The COD System will add the appropriate award year to the warning/reduction text messages and web correspondence when a:
 - School’s Pell Current Funding Level (CFL) is reduced to the level of Net Accepted & Posted Disbursements (NAPD), **OR**
 - School is notified of Verification “W” deobligations

Hot Topics

- Full Participant Status
- XML Schema Processing
- Unique for Pell
- Edits
 - Modified Edit 055
 - Complete Address Edits
 - Reimbursement Analyst Edits
 - SSN Change Edits
- COD School Relations
- Pell Update

Modified Edit 055 – Warning Edit

- ❑ “Disbursement Information Received 30 Days or more after Date of Disbursement”
- ❑ Edit 055 will be returned when the:
 - Disbursement Sequence Number = 01, **AND**
 - Disbursement Information received and processed more than 30 days later than the Disbursement Date reported on the record, **AND**
 - Disbursement Release Indicator (DRI) = true
- ❑ This edit will apply to ALL award years.
- ❑ This change was made in response to school feedback.

Complete Address Criteria

- ❑ A complete address is defined as:
 - A Domestic address must contain the following:
 - AddressLine AddressStateProvinceCode
 - AddressPostalCode AddressCity
 - A Foreign address must contain the following:
 - AddressLine AddressCountryCode
 - AddressCity

Warning Edit 120 – Complete Address

- ❑ “Incomplete address; complete address exists on COD; (for Direct Loan PLUS only, student address is incomplete).” – **Warning Edit 120**
- ❑ Edit returned if a complete address is not submitted on the Pell incoming record but is found in CPS or in the COD database
- ❑ Edit will apply to ALL award years

Warning Edit 120 – Complete Address

- Edit 120 will apply to Full Participants and Prior Year Pell Grant Phase-in Participants (Edit 396)
- Avoid edit by submitting a complete address in an initial Pell Record

Reject Edit 021 – Incomplete Address

- Address is incomplete" - **Reject Edit 021**
- Edit is new for Pell and will apply to ALL award years
- Prior to rejecting, COD will check if a complete address exists on the COD database or in CPS

Note: If COD pulls a Address Country Code for a foreign address from CPS, the record will reject.

Reject Edit 021 – Incomplete Address

- ❑ Edit 021 will apply to Full Participants, Prior Year Pell Phase-In Participants (Edit 397), and Prior Year Direct Loan Phase-In Participants (Origination Edits 02, 20 and 57)
- ❑ If rejected, schools must update and resubmit a complete address
- ❑ For assistance with correcting this edit for prior award years refer to the COD Implementation Guide or contact COD School Relations Center

Reimbursement and Heightened Cash Monitoring Reject Messages

Edit	Before 2005-2006	2005-2006 and Forward
083	Inadequate/Missing/Eligibility Information	Eligibility Issues
084	Inadequate/Missing Fiscal Information	Incorrect Calculation(s)
085	Inadequate/Missing Award or Disbursing Information	Already Being Funded
086	Not Meeting Reporting Requirements	Improper Package Submission
087	Failure to Comply with Requirements	Incomplete Student Processing
088	Inadequate or Missing Documentation	Missing Documentation

*These Edits will apply for all Award Years

Reject Edit 121 – SSN Changes

- ❑ “SSN Change Request Rejected as Person is also a PLUS borrower” – **Reject Edit 121**
- ❑ Edit will be returned when an SSN change is submitted on any award type if:
 - Person is also a PLUS borrower AND
 - PLUS award is greater than zero and is not yet fully disbursed
- ❑ Edit applies to ALL award years

Reject Edit 121 – SSN Changes

- ❑ Edit 121 applies to Full Participants, Prior Year Pell Phase-In Participants (Edit 332/996) and Prior Year Direct Loan Phase-In Participants (Origination/Change Edit 83/996)
- ❑ If rejected, schools must adjust the original Pell award to \$0 and resubmit a new Pell award with the updated SSN

Hot Topics

- News
- Full Participant Status
- XML Schema Processing
- Unique for Pell
- Edits
- COD School Relations
 - Outreach Efforts
 - American Customer Satisfaction Index (ACSI) Survey
- Pell Update

Experts Available

- ❑ COD Customer Service Representatives are your connection to the experts:
 - Reconciliation
 - Issue concerns
 - Escalation

Outreach Efforts

- ❑ The COD School Relations Center performs outreach via phone and e-mail to schools:
 - Automated e-mail is sent to Financial Aid Administrators.
 - COD has increased the use of e-mail as a means to communicate with schools. We encourage schools to review their contact information in COD to ensure it is current.

- ❑ Refer to the following IFAP announcement at:
http://www.ifap.ed.gov/eannouncements/1126U_pdateContacInfoinCODSys.html

Outreach Efforts

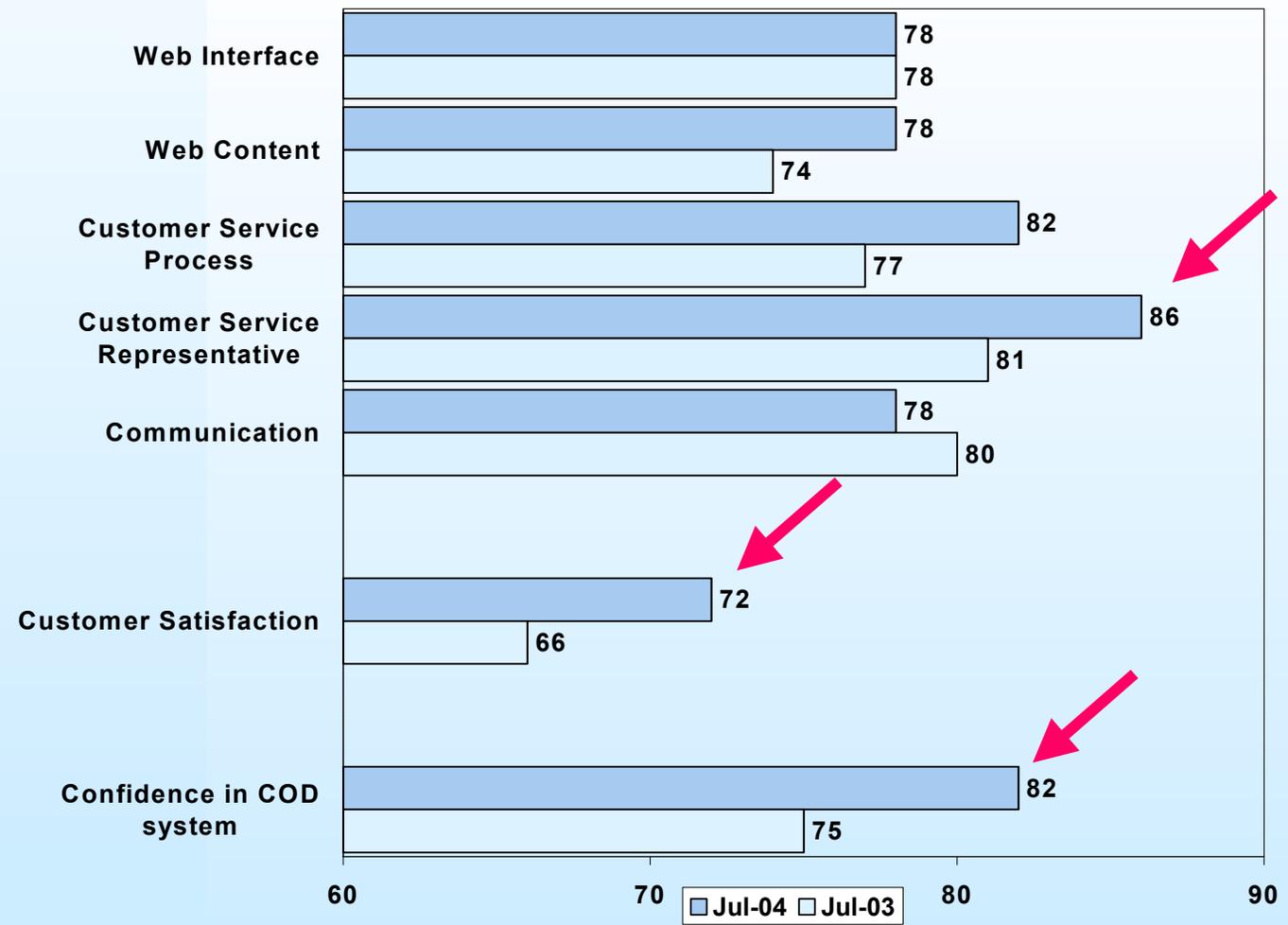
- ❑ COD Customer Service proactively monitors the processing and reporting of disbursements for the Pell Grant and Direct Loan programs.
 - Reminder email sent weekly with subject title “School Monitoring Outreach” with status of :
 - Pell Grant Unsubstantiated Cash
 - Direct Loan Unsubstantiated Cash
 - Pell Grant Potential Over award Situations (POP)
 - Unbooked Direct Loans

Outreach Efforts

- Schools that have students in a POP situation that have not submitted an adjustment prior to 30 days,
- Unprocessed Deobligations, and
- Verification “W” updates

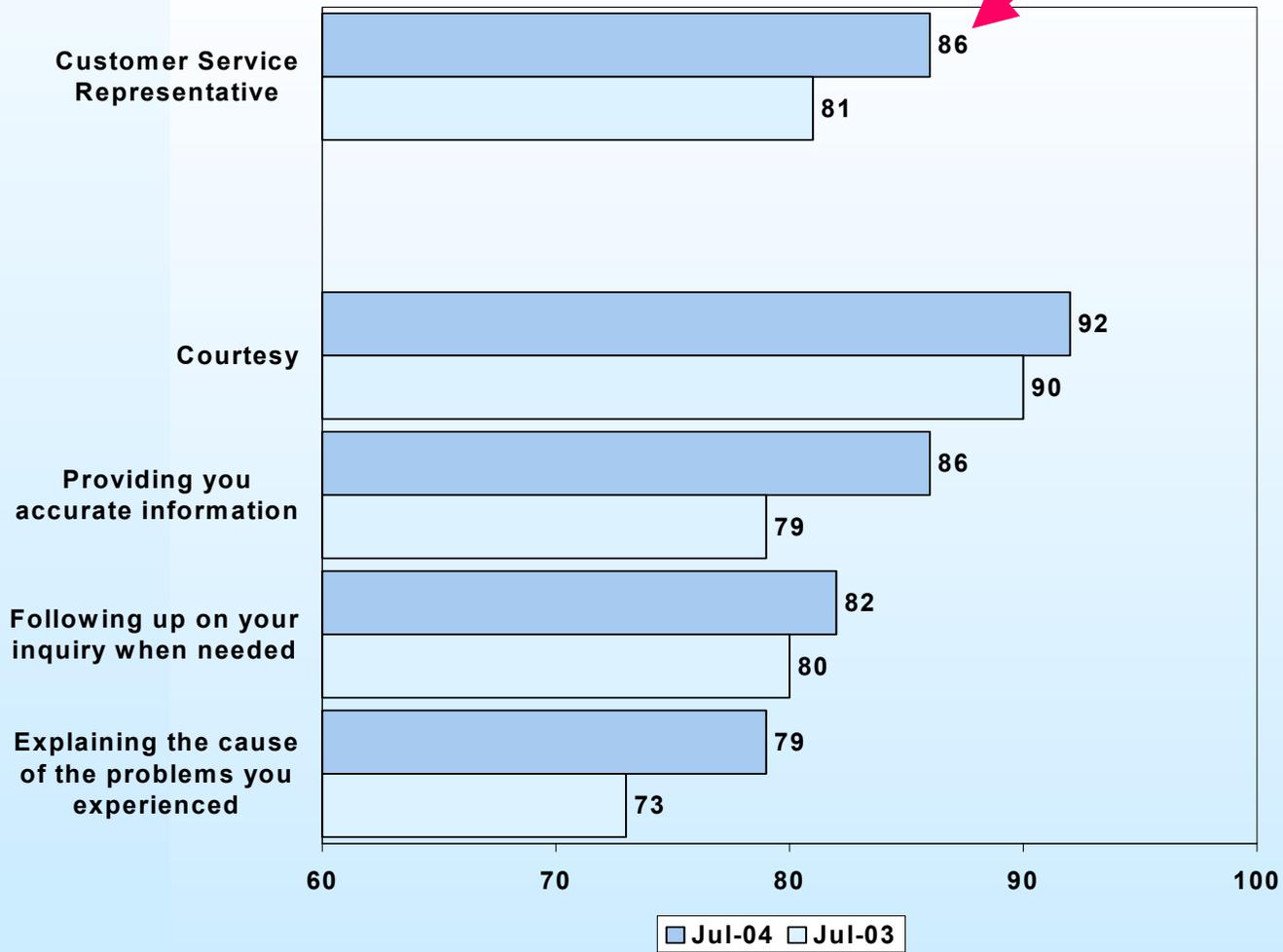
Survey Results

Overview



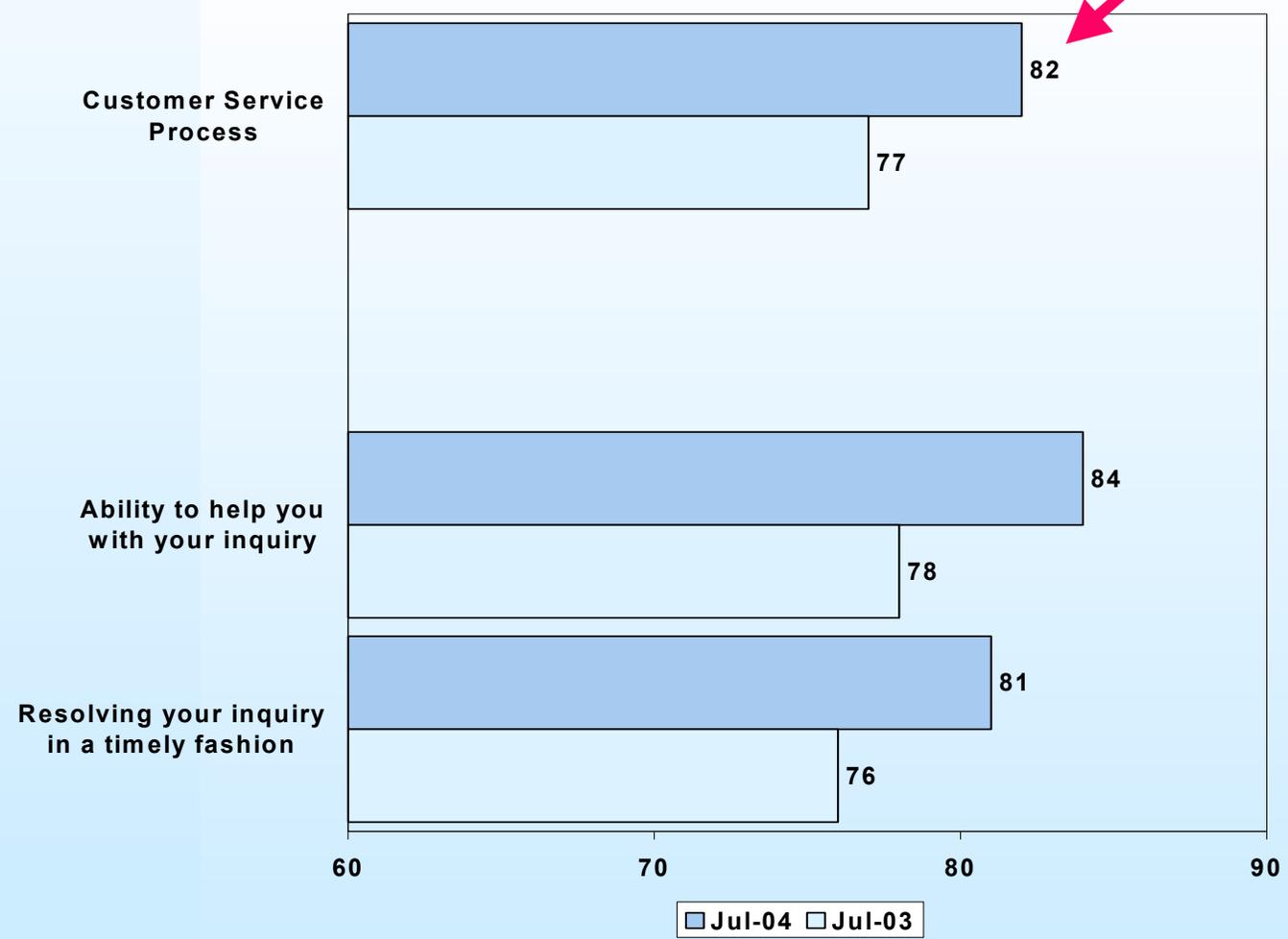
Survey Results

Customer Service Representative



Survey Results

Customer Service Process



Hot Topics

- Full Participant Status
- XML Schema Processing
- Unique for Pell
- Edits
- COD School Relations
- Pell Update
 - Reports
 - Calendar of Events

Reports

Pell Funded Disbursement List (as applicable)

- Generated when actual disbursements are funded
- Applies to Just-In-Time Schools
- Preformatted Text Message Class – PGFD05OP

Pell Year-To-Date Record (per request)

- Contains detailed origination, disbursement, and summary information at a transaction level on all Pell Grant recipients at the school
- Message Class – PGYR05OP

Reports

- ❑ Pell POP Report (Weekly)
 - Lists students currently in POP Lists
 - Lists students no longer in POP
 - Lists all schools involved
 - Preformatted Text Message Class – PGPR05OP

Reports

- ❑ Pell Pending Disbursement List (Weekly)
 - Lists anticipated disbursements
 - Lists actual disbursements with a disbursement date between 8 and 30 days in the future
 - Preformatted Text Message Class – PGDP05OP
- ❑ Pell Reconciliation (per request)
 - Student summary of processed records
 - Can be downloaded, printed, or imported into a spreadsheet for comparison with school data
 - Message Class – PGRC05OP

Reports

- ❑ **SSN/Name/DOB Change Report (as applicable)**
 - Lists all person identifier changes on the COD System
 - Sent to all Reporting Schools with awards in COD for that person for any of 3 award years
 - Preformatted Text Message Class – PGSN05OP
- ❑ **Verification Status (Monthly)**
 - Lists students selected for verification by CPS with a verification status code of blank or “W”
 - Optional for QA schools
 - Preformatted Text Message Class – PGVR05OP

What You Can Expect from Us

- Initial Authorization of Advanced Funded Schools
- Electronic Statement of Account
- System-Generated Negative Disbursements
- POP Notices
- Global Reductions
- Verification "W"
- Administrative Cost Allowance
- Reconciliation File

Assistance

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

Phone:

1-800-474-7268 (4P-Grant) - Federal Pell Grant

1-800-848-0978 - Direct Loan

Email: CODSupport@acs-inc.com

More about Pell

- ❑ #22 EDEExpress/COD Processing from a Pell Perspective
- ❑ #23 EDEExpress Pell: Becoming and Advanced User
- ❑ #25 Show Me the Money: How to Get & Maintain Funding for Pell Grants, Campus-Based, and Direct Loans
- ❑ #35 Pell Calcs and Recalcs for Term-based Programs with Compressed Courses

More about COD

- ❑ #17 Navigating the COD Web Site
- ❑ #18 COD: What's New for Direct Loan Processing 2005-2006
- ❑ #20 COD: Moving Beyond –Flat Files to XML Common Records
- ❑ #45 COD Open Forum: Questions & Answers