



## **Session 34**

# ***CommonLine and the Common Record: The Building of Convergence***

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# Session Objectives

- Understanding
  - Convergence
  - XML
  - Common Record
  - Common Record: CommonLine
- Benefits for Software Vendors
- Benefits for Schools
- Next Steps and Timing



# Convergence - An Evolution

- The FFELP community was pursuing implementation of its newest standard, CommonLine 5.0
- At the same time SIS and FAMS vendors and schools were understanding FSA's new COD Common Record requirements



# Convergence - An Evolution

- Software vendors began meeting in late 2001 to consider the benefits of convergence of FFELP's CommonLine and FSA's Common Record requirements
- Consensus was reached by the vendors that striving for a single data standard was preferable to implementing two divergent standards



# Convergence - An Evolution

- The convergence proposal was brought to the NCHELP Electronic Standards Committee (ESC) for review and consideration
- The ESC, representing the FFELP community, concurred with the vendor's proposal and has invested heavily in the convergence effort over the past year



# Convergence - An Evolution

- Common Data Dictionary across higher education
- Similar XML schemas
- Similar processing concepts
- Business rules as much the same as regulation and product function will allow



## Why 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**



## Why Adopt XML?

- XML can be used to support both **batch** processing and **real-time** processing
- XML provides **easy flexibility** between trading partners when needed
- Let's you send **only the data needed** for the process being performed



# The Common Record

- Core Components Data Dictionary
  - Common definitions
  - Common values
- Schemas
  - Common Record – COD
  - Common Record – CommonLine
  - Common Record – ISIR



# The Common Record

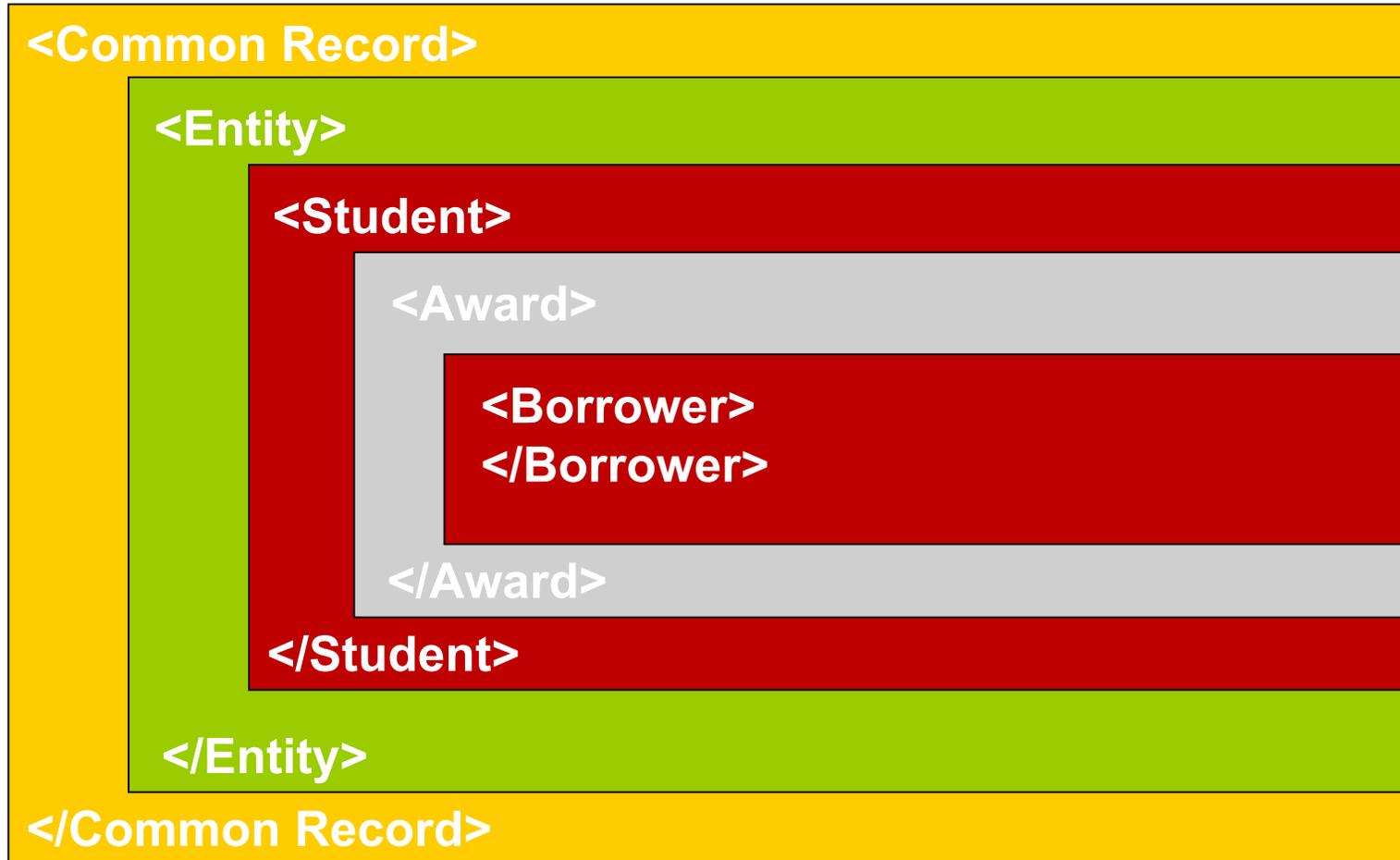
- Format is student-centric, showing data for multiple financial aid programs in one student complex element
- The entire common record or only those portions of the common record that changed can be transmitted



# The Common Record

- XML allows the Common Record to be easily changed (extensible)
- Format is human-readable, facilitating problem solving

# The Common Record Schema Structure





# CommonLine Reengineering

- Streamlining the application and disbursement processes
  - All records sent in a single file
  - Pre and post guarantee changes can now be sent together
  - Routing is at the record level
  - Moving from transaction based to end result based changes
  - Support of real-time XML-based functionality



# CommonLine Reengineering

- Example – pre-disbursement cancellation
  - In the CommonLine 5.0 process
    - Change type code
    - Loan Type Code
    - Disbursement Identification Number
    - Disbursement Date
    - Cancellation Date
    - Cancellation Amount
    - Revised Disbursement Amount



# CommonLine Reengineering

- Example – pre-disbursement cancellation
  - In the Common Record: CommonLine process
    - LoanAmount (new value)
    - DisbursementNumber (old value)
    - DisbursementAmount (zero)
    - CancellationDate (new value)



# CommonLine Reengineering

- CR:C supports the following:
  - Loan Requests
  - Certification Requests
  - Disbursement Rosters, Acknowledgements, Forecasts
  - Pre and post guarantee changes
  - Pre and post disbursement changes
  - Responses in three different models



# Common Record: CommonLine

- CommonLine converging and aligning with the Common Record
  - COD standards with the flexibility of FFELP
  - Supports all functionality available in CommonLine Release 5
  - Supports FFELP and alternative loans
- Designed to meet the needs of
  - Schools
  - SIS/FAMS Vendors



# Convergence - An Evolution

- The reengineering of CommonLine to fit the Common Record model has been a highly cooperative collaboration
  - NCHELP Electronic Standards Committee
  - Postsecondary Electronic Standards Council
  - Department of Education FSA



# Convergence - An Evolution

- Postsecondary Electronic Standards Council (PESC)
  - Serves as an umbrella organization for all wishing to support electronic standards in higher education



# Convergence - An Evolution

- National Council of Higher Education Loan Programs (NCHELP) Electronic Standards Committee (ESC)
  - Responsible for the creation and maintenance of standards for the electronic exchange of information for FFELP and alternative loans
  - Diverse industry representation



# Common Record: CommonLine

## Progress Report

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



# Common Record: CommonLine

## Progress Report

- Implementation Guide development has proceeded at an accelerated pace
  - First draft for public review – May 2003
  - Second draft for public review – June 2003
  - Final documentation published – July 2003
  - Review and updates to documentation - Ongoing



# Next Steps for FFELP

- Fine tune and finalize schema development
- Fine tune and update the documentation
- Review and resolve reported issues
- Develop a testing tool for CR:C
- Training, education, outreach



## Next Steps for FFELP

- CRC Training Sessions provide a detailed orientation and introduction to the CR:C standards
  - Jacksonville on January 29-30
  - Phoenix in February 23-24
  - Additional as needed



## Next Steps for FFELP

- The ESC is initiating an effort in collaboration with the vendors and FSA to develop a standard transport for the transmission of batch and real-time data that could be employed across higher education for the electronic exchange of data.
  - Particularly important because of the large data payloads enabled by XML



# The Implementation Schedule

- The Electronic Standards Committee has been in close touch with College Board, Datatel, PeopleSoft, Oracle, SCT, Sigma for their plans.
- All are in various stages of analysis and are forecasting production implementations between Fall '04 and Spring '05. Sigma is looking for testing partners in Spring '04.



# The Implementation Schedule

- Most lenders, guarantors, and servicers are planning schedules parallel to the vendor timelines. AES is looking at Spring '04
- Most are too early in analysis to determine if their implementation strategy will be all-in or phase-in.
- If phase-in, most would implement in lifecycle sequence



# What this means for Schools

- Schools with a FAMS system
  - Stay in touch with your vendor for updates on their implementation plans
- Schools that do their own programming
  - Access all of the documentation available online for your IT staff
  - Submit questions and issues at [www.nchelp.com](http://www.nchelp.com) for review and resolution by the NCHELP ESC



## Information Sources

- NCHELP - The CRC Implementation Guide is available at [www.nchelp.com](http://www.nchelp.com)
- IFAP – COD news, technical documentation, updates, etc. at [ifap.ed.gov](http://ifap.ed.gov)
- PESC – XML Technical Specifications, Data Dictionaries, Schemas, assistance and approvals, etc. at [www.standardscouncil.org](http://www.standardscouncil.org)



## We'll be happy to help

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

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