Overview of Changes from 2016-2017 to 2017-2018

VOLUME I
SECTION
2

This section provides an overview of the changes made for 2017-2018 for Common Origination and Disbursement (COD).

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Common Origination and Disbursement (COD) Changes

Changes from 2016-2017 to 2017-2018

The change descriptions are organized by the following three categories: Additions, Modifications, and Removals. The first column provides a description of each change. The remaining columns indicate which programs the change will affect.

Additions to Common Origination and Disbursement

Description	Pell Grant Program	Direct Loan Program	TEACH Grant Program
Program-Related Data Reporting	✓	✓	✓
Pell Grant School Account Statement (SAS) Report	✓		
Pell Grant School Account Statement (SAS) Disbursement Detail on Demand	✓		
SULA Adjustment Needed Report		✓	
Year-Round Pell	✓		
MPN Status Report		✓	

Modifications to Common Origination and Disbursement

Description	Pell Grant Program	Direct Loan Program	TEACH Grant Program
Edit 043	✓	✓	✓
Edit 065	✓		
Edit 068	✓		
Edit 071	✓	✓	✓
Edit 172	✓		
Edit 173	✓		
Edit 174	✓		
Edit 175	✓		
Edit 202	✓	✓	✓
Edit 203		✓	✓
Edit 204	✓		
Edit 208		✓	✓
Edit 209	✓	✓	✓
Edit 211	✓	✓	✓
Edit 221	✓	✓	✓
Direct Loan Rebuild		✓	
TEACH Rebuild			✓

Description	Pell Grant Program	Direct Loan Program	TEACH Grant Program
Pell Year-to-Date	✓		
COD Reporting Website	✓	✓	✓
Duplicate Student Borrower Report		✓	
Direct Loan Actual Disbursement List		✓	
Direct Loan Counseling Report		✓	
Direct Loan School Account Statement (SAS)		✓	
Direct Loan School Account Statement (SAS) Disbursement Detail on Demand		✓	
TEACH Multiple Reporting Record (MRR)			✓
TEACH ATS Discharge Report			✓
TEACH Pending Disbursement List Report			✓
Pell Multiple Reporting Record (MRR)	✓		
Pell Lifetime Eligibility Used	✓		
Pell Pending Disbursement List Report	✓		
Pell Verification Status report	✓		
Pell POP Report	✓		

Removals from Common Origination and Disbursement

Description	Pell Grant Program	Direct Loan Program	TEACH Grant Program
Edit 171	✓		
Direct Loan Booking Warning Report		✓	
Direct Loan SSN/Name/Date of Birth Change Report		✓	
MPN Discharge Report		✓	
Expired MPN Report		✓	
MPNs Due to Expire		✓	
Direct Loans Inactive Loans Report		✓	
TEACH Inactive Grant Report			✓
TEACH SSN/Name/Date of Birth Change Report			✓
Pell SSN/Name/Date of Birth Change Report	✓		

Additions to COD for 2017-2018

Program-Related Data Reporting

Beginning in March 2017, the COD System will be updated to collect program-related data information. For each program type, Pell, Iraq & Afghanistan Service Grant, TEACH and Direct Loan, relevant fields will be added to, or shifted in placement on, the schema to facilitate the eligibility determination process. Additionally, COD will begin editing on the new fields; new values and edits will be returned in the Common Record response.

For the Pell/Iraq & Afghanistan Service Grant programs, the following tags will be removed from the award block and added to the disbursement block. These tags will be required for all new disbursements for the 2017-2018 Award Year and forward:

- <PublishedPgmLengthYears>
- <PublishedPgmLengthMonths>
- <PublishedPgmLengthWeeks>
- <WeeksProgramsAcademicYear>
- <SpecialPrograms>
- <ProgramCredentialLevel>

For the Pell/Iraq & Afghanistan Service Grant programs, two existing fields will be required in the disbursement level block for Award Years 2017-2018 and forward:

- <EnrollmentStatus>
- <ProgramCIPCode>

For the Direct Loan Program, the following tags will be added to the disbursement block for Award Years 2017-2018 and forward. These tags will be required for all new disbursements for the 2017-2018 Award Year and forward. Please note, the fields will not be removed from the award block as they will remain in use for Award Years 2016-2017 and prior:

- <PublishedPgmLengthYears>
- <PublishedPgmLengthMonths>
- <PublishedPgmLengthWeeks>
- <WeeksProgramsAcademicYear>
- <SpecialPrograms>
- <ProgramCredentialLevel>

COD will validate that the fields are in the correct location for each award year; COD will return Edit 996 if the tags are not submitted in the correct blocks for the submitted award year.

For the TEACH Program, the following fields will be added to the disbursement block. These tags will be required for all new disbursements for the 2017-2018 Award Year and forward:

- <PublishedPgmLengthYears>

- <PublishedPgmLengthMonths>
- <PublishedPgmLengthWeeks>
- <WeeksProgramsAcademicYear>
- <SpecialPrograms>
- <ProgramCredentialLevel>

Pell Grant School Account Statement (SAS)

Beginning in March 2017, the COD System will deliver via the SAIG mailbox the Pell Grant School Account Statement (SAS) for Award Years 2017-2018 and forward.

Pell Grant School Account Statement (SAS) Disbursement Detail On-Demand

Beginning in March 2017, schools will be able to request the new Pell Grant School Account Statement (SAS) Disbursement Detail on Demand via the New Report Requests page in COD for Pell 2017-2018 and forward.

SULA Adjustment Needed Report

In June 2017, the SULA Adjustment Needed Report was made available to schools in 'Comma-Delimited with Headers' format in the COD Reporting Web site. Please refer to Volume VI Section 8 – Reports for more details.

Required Updates/Loan Reductions

In Dear Colleague Letter Gen-13-13, schools are required to reduce remaining anticipated disbursements to zero, adjust all award amounts to equal the sum of actual disbursements, and adjust loan period dates to remove terms/payment periods for which no disbursement was made or retained. These changes are to be made within the 15-day reporting guidelines. For more detailed guidance see the Electronic Announcement 150% Direct Subsidized Loan Limit: Electronic Announcement #21 - Common Subsidized Loan Limit Usage Inquiries.

Beginning late 2017, in cases where the school has not made the required updates, the COD System will update the records when:

1. The school or FSA confirms the school has closed out for the award year for which the loan was reported.
   And/Or

2. The closeout date has passed, the school is not on extended processing and the latest loan period (i.e. the financial award end date) for that school is in the past. The date of the reduction will be announced.

The reductions will be completed for all loan types and awards reported in 2012/13 and forward, to ensure more accurate subsidized usage calculations for borrowers.

Year-Round Pell

Dear Colleague Letter GEN-17-06 outlined new guidance regarding student eligibility to receive up to 1.5 times their Scheduled Federal Pell Grant (SFPG) for the 2017-2018 Award Year and forward, when the Additional Eligibility Indicator (AEI) is equal to "true" for the award year. This new guidance also applies to the Iraq Afghanistan Service Grant.

Beginning October 15, 2017, the COD System will accept, store, display, and return the optional <AdditionalEligibilityIndicator> (AEI) Boolean field in the Pell Award block. The AEI is required to be submitted on Pell Awards that will exceed the standard 100% SFPG so that the proper editing can be triggered. The AEI should not be submitted for a Pell Awards that will not exceed 100% of a student's SFPG. Various edit modifications, outlined in this section and in more detail in Volume II, Section 4, will be made to accommodate this project.

MPN Status Report

Beginning October 15, 2017, the new MPN Status Report will be available to schools as a combination of the MPN Discharge Report, Expired MPN Report, and MPNs Due to Expire Report. The report will be sent to schools in 'Comma-Delimited with Headers' format in both SAIG and the COD Reporting Web site. The report will be sent in the new message class *MPNSTAOP*. Please refer to Volume VI Section 8 – Reports for more details.

Modifications to COD for 2017-2018

Edit 043

The COD System evaluates whether the common record received date is on or after the record submission deadline, before the record submission start date, or after the school has closed out for Direct Loan, Pell, and TEACH. If the common record is not received within the valid record submission date range without Extended Processing Period, or after school has been confirmed closed out, the award will be rejected with Edit 43. This Edit will continue to not apply to Pell Grants if it is a downward disbursement adjustment or if the student is in a POP situation.

Edit 065

The COD System triggers Disbursement Level Warning Edit 065 for Pell awards if the award's Disbursement Amount is decreased but the Pell award is still in POP or Negative Pending situation. For 2017-2018 Award Year and forward this edit triggers regardless of the value of the AEI.

Edit 068

The COD System triggers Disbursement Level Warning Edit 068 for Pell awards if the student has two or more Pell awards in an award year at different schools, and the student is in a POP situation. This change began with the 2017-2018 Award Year, and will occur regardless of the value of the AEI.

Edit 071

If a new disbursement, disbursement adjustment, or a disbursement maintenance to set DRI = T for the first time is not received within the valid record submission date range (between Earliest Date to Accept a Common Record (EDACR) and Latest Date to Accept a Common Record (LDACR)) without Extended Processing Period, or after school has been confirmed closed out, the disbursement will be rejected with Edit 71. This Edit will continue to not apply to Pell Grants if it is a downward disbursement adjustment or if the student is in a POP situation.

Edit 172

The COD System will trigger the Award Level Rejecting/Correcting Edit 172 for Pell awards in the 2017-2018 Award Year and forward if the Pell Award Amount exceeds 1.5 times the student's Scheduled Federal Pell Grant (SFPG) and the AEI is equal to "true".

Edit 173

The COD System will trigger the Award Level Rejecting/Correcting Edit 173 for Pell awards in the 2017-2018 Award Year and forward when the AEI is changed from "true" to "false" and the Award Amount is greater than the student's SFPG.

Edit 174

The COD System will trigger the Award Level Warning Edit 174 for Pell awards in the 2017-2018 Award Year and forward when the AEI is changed from "true" to "false" and the Award Amount is reduced to an amount that is lower than the Total Funded Disbursement Amount.

Edit 175

The COD System will trigger the Award Level Warning Edit 175 for Pell awards in the 2017-2018 Award Year and forward when the AEI is changed from "true" to "false" and the TEU is greater than 100% plus the absolute net value of Closed School LEU Resoration Adjustments for that award year.

Edit 202

In March 2017 the COD System began to apply Edit 202 for the Direct Loan, Pell, Iraq & Afghanistan Service Grant, and TEACH program types at the disbursement level for Award Years 2017-2018 and forward.

Edit 203

In March 2017, Edit 203 began to be applied at the disbursement level for both TEACH and Direct Loan program types for Award Years 2017-2018 and forward.

Edit 204

In March 2017, the COD System began to apply Edit 204 for Pell and Iraq & Afghanistan Service Grants at the disbursement level for Award Years 2017-2018 and forward.

Edit 208

In March 2017, Edit 208 began to be applied at the disbursement level for both TEACH and Direct Loan program types for Award Years 2017-2018 and forward.

Edit 209

In March 2017, the COD System began to apply Edit 209 for the Direct Loan, Pell, Iraq & Afghanistan Service Grant, and TEACH program types at the disbursement level for Award Years 2017-2018 and forward.

Edit 211

In March 2017, the COD System retired common record Edit 211 for records submitted with in a 4.0c schema version; COD will continue to return Edit 211 for records submitted using an earlier version of the schema.

Edit 221

In March 2017, the COD System began to apply Warning Edit 221 to indicate a student's Pell Lifetime Eligibility Used (LEU) has been altered due to Closed School LEU Restoration adjustment.

Direct Loan Rebuild

In March 2017, the Direct Loan Rebuild file began to include program-related data reporting fields.

TEACH Rebuild

In March 2017, the TEACH Rebuild file began to include program-related data reporting fields.

Pell Year-to-Date (YTD) Report

In March 2017, the Pell Year to Date Report began to include program-related data reporting fields.

COD Reporting Website

School reports that are generated after October 15, 2017 will now be available in the new COD Reporting Web site instead of the current school Newsbox. The Report Selection and Report Request pages on COD Web will also be updated to reflect the new options and formats. Modified reports will be sent in new SAIG message classes. Please refer to Volume VI Section 8 – Reports for more details.

Duplicate Student Borrower Report

Beginning October 15, 2017, the Duplicate Student Borrower Report will be sent to schools with updated logic in 'Comma-Delimited with

Headers' format in both SAIG and the COD Reporting Web site. The 'Preformatted Text' and 'Pipe-Delimited' formats will no longer be available as of this date. Please refer to Volume VI Section 8 – Reports for more details.

Direct Loan Actual Disbursement List

Beginning October 15, 2017, the Direct Loan Actual Disbursement List will be sent to schools with additional fields in 'Comma-Delimited with Headers' format in both SAIG and the COD Reporting Web site. Please refer to Volume VI Section 8 – Reports for more details.

Direct Loan Counseling Report

Beginning October 15, 2017, the Direct Loan Counseling Report will be sent to schools with updated fields in 'Comma-Delimited with Headers' format only in the COD Reporting Web site. Please refer to Volume VI Section 8 – Reports for more details.

Direct Loan School Account Statement (SAS)

Beginning October 15, 2017, the Direct Loan School Account Statement (SAS) will be sent to schools in 'Fixed Length' or 'Comma-Delimited with Headers' formats in SAIG. The 'Comma-Delimited without Headers' and 'Pipe-Delimited' formats will no longer be available as of this date. Schools who are opted into the retired formats as of this date will begin to receive the 'Comma-Delimited with Headers' instead. This option can be updated to 'Fixed Length' on the Report Options page on COD Web. Please refer to Volume VI Section 8 – Reports for more details.

Direct Loan School Account Statement (SAS) Disbursement Detail on Demand

Beginning October 15, 2017, the Direct Loan School Account Statement (SAS) will be sent to schools in 'Fixed Length' or 'Comma-Delimited with Headers' formats in SAIG. The 'Comma-Delimited without Headers' and 'Pipe-Delimited' formats will no longer be available as of this date. Please refer to Volume VI Section 8 – Reports for more details.

Direct Loan Pending Disbursement Listing Report

Beginning October 15, 2017, the Direct Loan Pending Disbursement Listing Report will be sent to schools in 'Comma-Delimited with Headers' format in both SAIG and the COD Reporting Web site. The report will be sent in the new message class *DLPDyyOP*. The 'Preformatted Text' and 'Pipe-Delimited' formats will no longer be available as of this date. Please refer to Volume VI Section 8 – Reports for more details.

TEACH Multiple Reporting Record (MRR)

Beginning October 15, 2017, the TEACH Multiple Reporting Record will be sent to schools in 'Fixed Length' format via SAIG and will now be available in 'Comma-Delimited with Headers' format in the COD Reporting Web site. Please refer to Volume VI Section 8 – Reports for more details.

TEACH ATS Discharge Report

Beginning October 15, 2017, the TEACH ATS Discharge Report will be sent to schools in 'Fixed Length' format via SAIG and 'Comma-Delimited with Headers' format in the COD Reporting Web site. Please refer to Volume VI Section 8 – Reports for more details.

TEACH Pending Disbursement List Report

Beginning October 15, 2017, the TEACH Pending Disbursement List Report will be sent to schools in 'Comma Delimited with Headers' format in both SAIG and the COD Reporting Web site. The report will be sent in the new message class *THPEyyOP*. The preformatted version will no longer be available as of this date. Please refer to Volume VI Section 8 – Reports for more details.

Pell Multiple Reporting Record (MRR)

Beginning October 15, 2017, the Pell Multiple Reporting Record will be sent to schools in 'Fixed Length' format via SAIG and will now be available in 'Comma-Delimited with Headers' format in the COD Reporting Web site. Please refer to Volume VI Section 8 – Reports for more details.

Pell Lifetime Eligibility Used

Beginning October 15, 2017, the Pell Lifetime Eligibility Used will continue to be sent to schools in 'Comma Delimited with Headers' format in SAIG and will now be available in the same format on the COD Reporting Web site. Please refer to Volume VI Section 8 – Reports for more details.

Pell Pending Disbursement List Report

Beginning October 15, 2017, the Pell Pending Disbursement List Report will be sent to schools in 'Comma Delimited with Headers' format in both SAIG and the COD Reporting Web site. The report will be sent in the new message class *PGPEyyOP*. The preformatted version will no longer be available as of this date. Please refer to Volume VI Section 8 – Reports for more details.

Pell Verification Status Report

Beginning October 15, 2017, the Pell Verification Status Report will be sent to schools in 'Comma Delimited with Headers' format in both SAIG and the COD Reporting Web site. The report will be sent in the new message class *PGVSyyOP*. The preformatted version will no longer be available as of this date. Please refer to Volume VI Section 8 – Reports for more details.

Pell POP Report

Beginning October 15, 2017, the Pell Verification Status Report will be sent to schools in 'Comma Delimited with Headers' format in both SAIG and the COD Reporting Web site. The report will be sent in the new message class *PGPOyyOP*. The preformatted version will no longer be

available as of this date. Please refer to Volume VI Section 8 – Reports for more details.

Removals from COD for 2017-2018

Edit 171

This edit is no longer applicable and has therefore been removed from the COD System.

Retired COD Reports

The following reports will not be generated in both the COD Reporting Website and SAIG versions beginning October 15, 2017:

- Direct Loan Booking Warning Report

- Direct Loan SSN/Name/Date of Birth Change Report

- MPN Discharge Report

- Expired MPN Report

- MPNs Due to Expire

- Direct Loans Inactive Loans Report

- TEACH Inactive Grant Report

- TEACH SSN/Name/Date of Birth Change Report

- Pell SSN/Name/Date of Birth Change Report