Electronic Access Conference

2002

Session 44

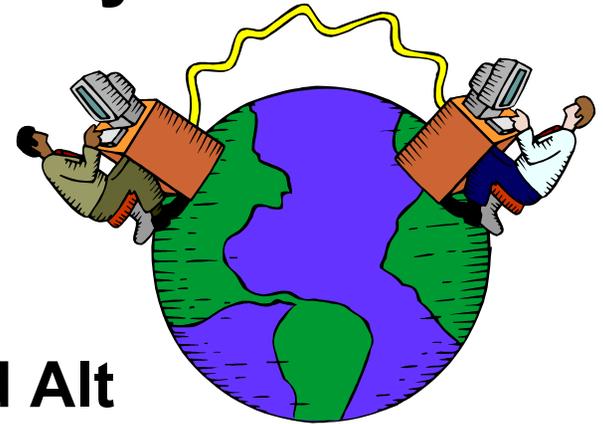# CommonLine and the Common Record

NCHELP

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The Common Record

- **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

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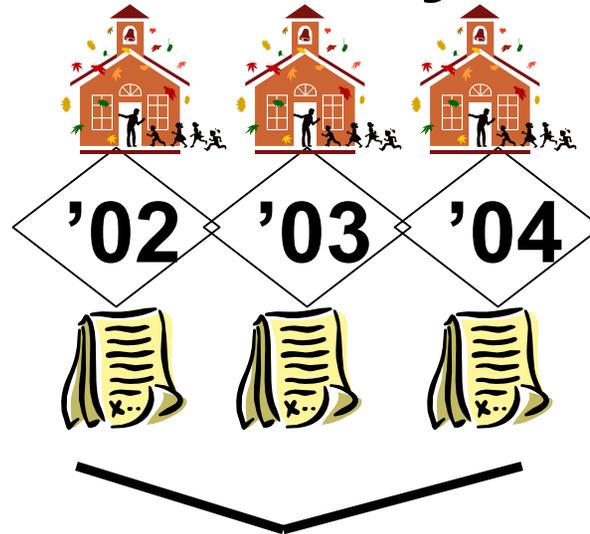
The Common Record

- **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 which changed can be transmitted**

- **XML allows the Common Record to be easily changed (extensible)**

- **Format is human-readable, facilitating problem solving**

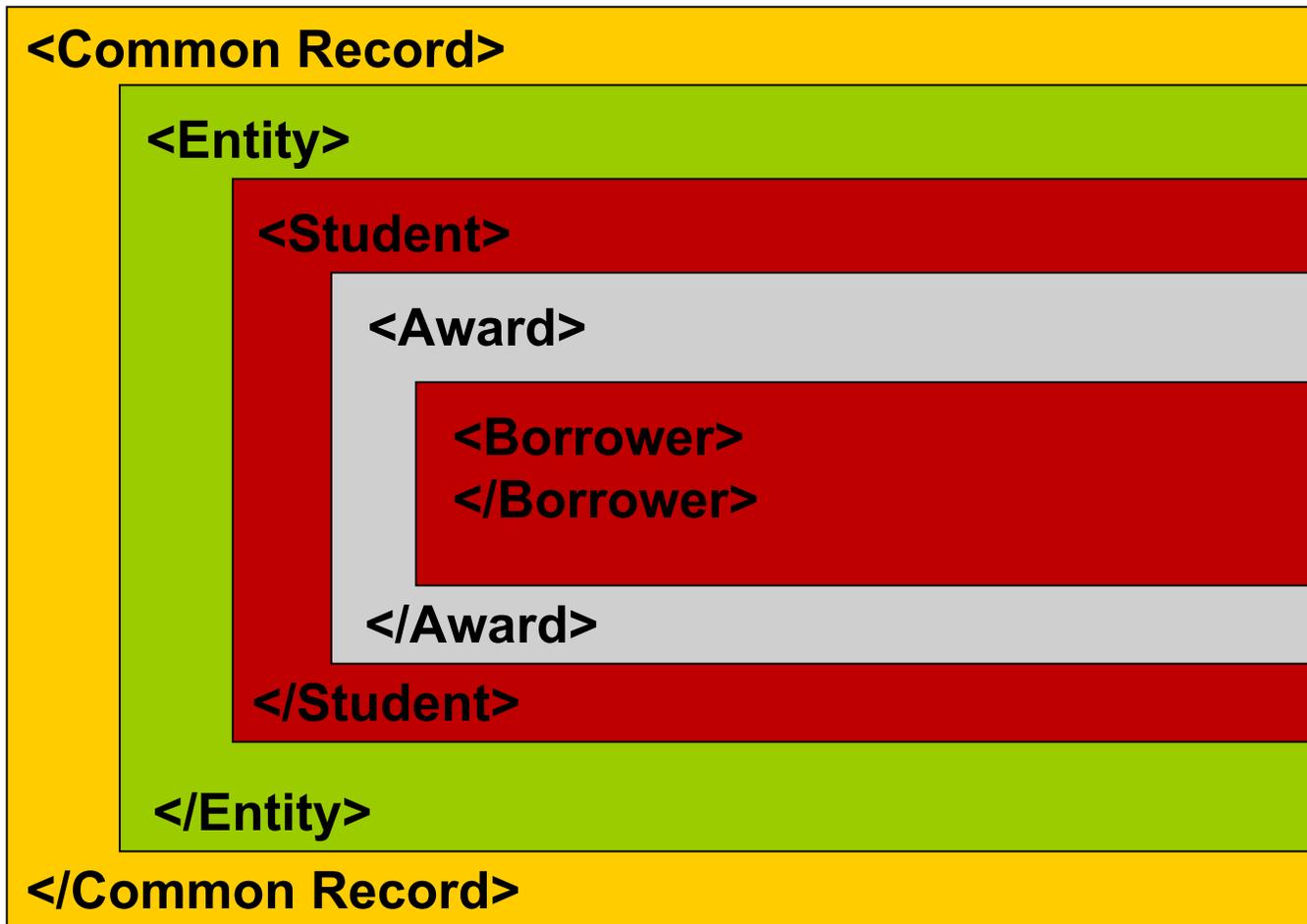# *The Common Record*

■ **Document Structure allows you to send data for:**

- ▪ **Multiple Schools**
- ▪ **Multiple Years**
- ▪ **Multiple Awards**

'02 '03 '04

In ONE Transmission!

1

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The Common Record – Schema Structure

```
<Common Record>
    <Entity>
        <Student>
            <Award>
                <Borrower>
                </Borrower>
            </Award>
        </Student>
    </Entity>
</Common Record>
```

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**

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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

Legacy
Systems

Transport Mechanism

Standards

Common Elements

XML

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CommonLine Strategy

- CommonLine Converging with the Common Record

- Convergence – taking the best of all programs and creating a new standard, not adoption of one over another

Collaboration

- CommonLine was the foundation of the Common Record

- Department of Education ESC Participation

- PESC XML Forum

ESC XML Mission

To design a single standard XML-based Common Record to support all financial aid programs, including FFEL and Direct Lending, eliminate multiple flat files, and provide a simplified process for the submission of financial aid data by schools and their SIS partner. The initial effort will focus on incorporating FFELP business flows into the Common Record, merge like terms and processes between the various programs and capitalize on the efficiencies of the XML technology. The resulting system standards will still allow each program to maintain features within the Common Record that are unique to their program and business processes. In addition, this effort will develop/produce specifications and proposed standards which take into account existing FFEL industry standards and the need to support translations between specifications as well as an anticipated phased adoption and implementation of the new specifications by SIS vendors and the FFEL community. Future convergence activities will look to further streamline the process within Common Record.

ESC XML Mission

- **To design a single standard XML-based Common Record**

- **to support all financial aid programs,**

- **eliminate multiple flat files**

- **provide a simplified process for the submission of financial aid data by schools and their SIS partner**

ESC XML Mission

- **Initial effort will focus on incorporating FFELP business flows into the Common Record,**

- **merge like terms and processes between the various programs**

- **capitalize on the efficiencies of the XML technology**

ESC XML Mission

- **The resulting system standards will still allow each program to maintain features within the Common Record that are unique to their program and business processes**

- **Develop specifications and proposed standards which take into account existing FFEL industry standards and the need to support translations between specifications as well as an anticipated phased adoption and implementation of the new specifications by SIS vendors and the FFEL community.**

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**

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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:**

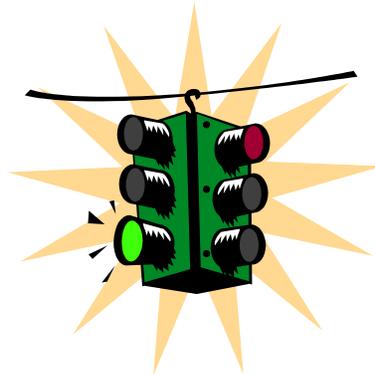|	
LoanAmount	**(new value)**
DisbursementNumber	**(old value)**
DisbursementAmount	**(zero)**
CancellationDate	**(new value)**

Proposed Implementation Schedule

- **12/15/2002 – Close all open issues**
- **4/1/2003 – First draft of documentation**
- **6/1/2003 – Final documentation completed**
- **12/1/2003 – Testing begins**
- **4/1/2004 – Implementation begins**

Next Steps for FFELP

■ **November 11, 2002 – Presentation to schools and SIS vendors**

  – **Received a *GREEN* light from vendors**

  – **Received a *GREEN* light from schools**

  – **Received a *GREEN* light from service providers**

Next Steps for FFELP

- **Final comments on the proposal were due to the ESC by 11/22/2002**

- **ESC will review all comments and offer resolution to the school and vendor community via a series of conference calls the week of 12/09/2002**
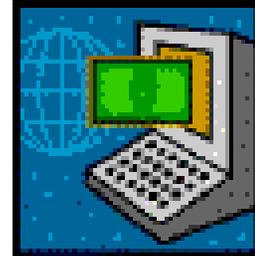
Next Steps for FFELP

- Final review and approval of proposal
- Finalize schema development
- Training, education and outreach!

Next Steps for FSA

Using XML and Developing Standards will:

- **Simplify business process and technology for Schools**
- **Map data to business processes**
- **Utilize open technology supporting future enhancements**

ISIR Institutional Student Information Record	COD Common Origination And Disbursement	NSLDS National Student Loan Data System
Award Year 2004-05 Phase-in process for schools to be determined	Award Year 2002-03 50 Schools Award Year 2003-04 1,000 or more *FFEL Expansion Implementation 2004-2005 Award Year 2004-05 All Schools	Schedule and Phase-in process for the Lending Community and Schools to be determined

* Effort led by FEELP

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Comments, Questions, Feedback, and Contact Information

Electronic Access Conference 2002

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