

## Inside

- Sponsorship Opportunities (p. 2)
- e-Transcript User Group Gains Momentum (p. 3)
- Fall 2008 Member Summit (p. 4)
- Membership Meeting Official Notice (p. 4)
- New Members (p. 4)
- Technology Tidbits (p. 5)
- FFEL Business Process and Data Standardization Update (p. 10)

Volume 7 ~ Issue 8 ~ August 2008

## Common Origination and Disbursement Approved as PESC Standard!

The Board of Directors and Steering Committee of the Postsecondary Electronic Standards Council (PESC) are pleased to announce the release of Common Origination and Disbursement (COD) as a PESC Member-Approved National Education Community Standard. All supporting documentation is available at [www.PESC.org](http://www.PESC.org). This effort marks a significant milestone and achievement for Federal Student Aid (FSA) of the U.S. Department of Education, the education community, the Standards Forum for Education, and for PESC.

Common Origination & Disbursement is a streamlined method for processing, storing, and reconciling Academic Competitiveness Grant (ACG), National Science and Mathematics Access To Retain Talent Grant (National SMART Grant), Teacher Education Assistance for College and Higher Education (TEACH) Grant, Federal Pell Grant (Pell Grant), and William D. Ford Federal Direct Loan (Direct Loan) financial aid data with the U.S. Department of Education. Schools, third party servicers, and software developers can obtain information about current production issues, news, and COD System functionality through various channels such as the COD Website (<http://cod.ed.gov>) and the IFAP Website (<http://ifap.ed.gov>).

PESC Members that approved COD as a National Education Community Standard:

- AcademyOne, Inc.
- ACT
- American Association of Collegiate Registrars and Admissions Officers (AACRAO)
- Citibank
- Consumer Bankers Association (CBA)
- Datatel, Inc.
- Florida International University
- Georgetown University
- Iowa State University
- Jenzabar
- Mapping Your Future
- National Association of Student Financial Aid Administrators (NASFAA)

See **COD**, Page 2

Celebrating Our 10<sup>th</sup> Anniversary in 2007



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The Standard is the electronic newsletter published monthly by The Postsecondary Electronic Standards Council (PESC). The Standard covers news and events that impact information technology and data exchange; and promotes PESC's goals of improving service, controlling costs, and attaining interoperability within higher education. For information about subscriptions, advertising, and article submissions, please visit [www.PESC.org](http://www.PESC.org).  
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**COD**, from Page 1

- 
- o National Association of Student Loan Administrators (NASLA)
  - o National Council of Higher Education Loan Programs (NCHELP)
  - o National Student Clearinghouse
  - o Nelnet
  - o Oracle
  - o redLantern
  - o SunGard Higher Education
  - o University of Denver
  - o University of Illinois - Student Financial Services
  - o University of Illinois at Chicago
  - o University of Illinois at Urbana Champaign
  - o University of Minnesota
  - o University of Mississippi
  - o University of Northern Iowa
  - o University of Oklahoma
  - o University of Texas at Austin
  - o University of South Florida
  - o USA Funds
  - o U.S. Department of Education
  - o Wachovia Education Finance

## Sponsorship Opportunities!

PESC's Fall 2008 Member Summit, scheduled for Monday, October 6, 2008 through Tuesday, October 7, 2008, will be held in Arlington, VA. Summits, held in the fall and spring of each year, are the perfect opportunity to gather with fellow workgroup members to collaborate on PESC initiatives, to cultivate relationships with other members, and to be updated on all PESC activities.

PESC offers Sponsorship Opportunities to stakeholders and those interested in leading in the technology and standards community. The benefits of sponsoring a Summit include:

- Exposure for your organization - Your logo will be displayed on the Summit registraton site, in email announcements and reminders, on the program book, and thanked publicly at the meeting.
- The opportunity to speak to our Membership prior to the sponsored event.
- A chance to influence the direction of PESC initiatives.
- Much, much more..

In addition, PESC is now offering a discount to organizations that sponsor both the Fall and the Spring Member Summits! For more details please visit our Sponsorship Opportunities page.

If you are interested in continuing to support PESC events and demonstrating your commitment to standards, please complete the Sponsorship Registration Form, found at the bottom of our Sponsorship Opportunities page, and return it to Jennifer Kim, PESC Membership Services Manager, via fax or email at your earliest convenience. If you have any questions regarding sponsorship of this event or your PESC membership, feel free to contact Jennifer at (202) 261-6514 or at Jennifer.Kim@PESC.org. As always, she is happy to assist you.

Note that as of 8/26/08, representatives from the following organizations will be attending: AACRAO SPEEDE, Apollo Group Inc - University of Phoenix, College Board, Conestoga College Institute of Technology and Advanced Learning, ConnectEdu, Datatel, Florida International University, Georgetown University, Great Lakes Educational Loan Services, Iowa State University, Jenzabar, NASFAA, Nelnet, 5280 Solutions, Oracle Corporation, San Francisco State University, SunGard Higher Education, University of Minnesota, University of Oklahoma, University of Oregon, and Weber State University.

## e-Transcript User Group Gains Momentum

"We [at the National Transcript Center] applaud the development of the PESC XML high school transcript standard and are now using it with our clients. While extremely flexible and comprehensive, we have noted a few areas where the PK-12 community has some additional data needs," states Barbara S. Clements, Ph.D., Chief Standards Officer for the National Transcript Center and PESC Board member. "This is common when a new standard gets used in a variety of circumstances. We are looking forward to working with the PESC Transcript User Group to further enhance the high school transcript standard," Dr. Clements continues.

"Having worked on the PESC XML high school transcript standard workgroup since its inception in 2004, we at Docufide are pleased to see the growing use of this standard by many of our clients and the level of interest in its potential throughout the educational community," said John Reese, CEO of Docufide. "Delivering transcripts for high schools nationwide, we see not only how it addresses current needs for transcript data exchange, but also, by sharing "lessons learned" with others in the PESC Transcript User Group, how we can help it evolve and increase its adoption."

The launch of the electronic transcript user group will take place during PESC's Fall 2008 Member Summit being held Monday October 6 - 7, 2008 at the Hyatt Regency Crystal City. The tentative schedule for the overall Summit is posted on the PESC website at [www.PESC.org](http://www.PESC.org). In addition to the launch of the transcript user group, the Summit includes meetings of: the Steering Committee of the Standards Forum for Education, the Change Control Board (CCB), the Technical Advisory Board (TAB), the EA2 Task Force, the Seal of Approval Group, the Degree Audit Workgroup, and the PESC Board of Directors. Additionally, PESC is also launching a PDF Transcript Workgroup. More information about this workgroup will be announced shortly.

For the electronic transcript user group, attendees are encouraged to submit issues, problems, and requested enhancements to the PESC office prior to the Summit. All issues will be compiled and then presented to the User Group for review. All issues from the high school, college, XML and EDI transcripts are welcome for review and discussion. Going forward, most work will be conducted via teleconference call meetings facilitated by a chair who will be appointed by the User Group itself.

User Groups will serve as the development vehicles for future releases once a standard (v 1.0) has been established. PESC is pleased to offer participation in User Groups free of charge for members of PESC. Non-members interested in participating should contact PESC Executive Director Michael Sessa at 202.261.6516 or at [michael.sessa@pesc.org](mailto:michael.sessa@pesc.org).

Registration for the Fall 2008 Member Summit (which includes the transcript user group) is available by completing a registration form posted at [www.PESC.org](http://www.PESC.org) and submitting it along with a check for \$150 (for Members). For hotel reservations:

Group Name: Postsecondary Electronic Standards Council - PESC  
Date: October 6 - 7, 2008  
Group Rate: \$189 single/double  
Hotel Cut-Off: September 13, 2008  
Phone: 703 418 1234  
Address: Hyatt Regency Crystal City at Reagan National Airport  
2799 Jefferson Davis Highway,  
Arlington, Virginia, USA 22202

## Fall 2008 Member Summit

The tentative schedule for the Fall 2008 Member Summit is available on page 8 . It includes meetings of: the Steering Committee of the Standards Forum for Education, the Change Control Board (CCB), the Technical Advisory Board (TAB), the EA2 Task Force, the Seal of Approval Group, the Degree Audit Workgroup, and the PESC Board of Directors. Additionally, PESC is launching a USER GROUP for electronic Transcript Processing and a PDF Transcript Workgroup. PESC is pleased to offer participation in User Groups free of charge for Members of PESC. Non-members interested in participating in the User Group, which is being made available separately, should contact PESC Executive Director Michael Sessa at 202.261.6516 or at michael.sessa@pesc.org. Non-Members are able to attend the Summit and participate but must pay a higher registration fee.

Registration for the Summit is available by completing the attached registration form and submitting it along with a check for \$150 (for Members).

### PESC Member Summit

October 6 - 7, 2008

Hyatt Regency Crystal City

Group Name: Postsecondary Electronic Standards Council - PESC

Group Rate: \$189 single/double

Hotel Cut-Off: September 13, 2008

Phone: 703 418 1234

Address: Hyatt Regency Crystal City at Reagan National Airport  
2799 Jefferson Davis Highway,  
Arlington, Virginia, USA 22202

### Membership Meeting Official Notice

Please be advised that a full meeting of the PESC Membership will take place on Monday October 6, 2008 from 5:30pm - 6:30pm at the Hyatt Regency Crystal City during the Fall 2008 Summit.

Membership meetings are a great opportunity to meet and network with the PESC Board of Directors along with other organizational representatives, here about the latest events and activities happening at PESC, and voice your opinion and/or propose workgroups and activities.

During the Fall 2008 Membership Meeting, elections for the Steering Committee of the Standards Forum for Education will be taking place. Nominations open on Monday September 8, 2008 and close on Friday September 19, 2008. A nomination form is on page 9 and will also be posted on the PESC website.

### New Members

The Board of Directors of the Postsecondary Electronic Standards Council (PESC) is very pleased to announce that Clayton State University, Decision Academic, echo360, Florida International University, Indiana State University, Neumann College, Oregon State University, Prairie View A & M University, University of North Carolina, University of Oregon, and the U.S. General Services Administration (GSA) have joined the PESC Membership. Also ACT, College Source, ConnectEdu, Docufide, and Jenzabar have upgraded from Affiliate to full Member. We welcome all new members to the PESC community! Membership lists and links are posted on the PESC website at [www.PESC.org](http://www.PESC.org).

**Don't forget to register to reserve your hotel for the Fall Member Summit by September 13 for discounted rates!**

# Technology Tidbits

## and Standards Snippets

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■ The Liberty Alliance recently announced the official formation of the Liberty Alliance HR-EDU SIG. This SIG operates fully in the public domain and is open to public membership. The SIG was chartered to be a public forum for the market development and deployment of new draft ID-SIS profiles, studying cross interoperability issues with other related specifications and foster long-term adoption of the ID-SIS Specifications especially by creating liaisons with other specifications bodies. The full SIG charter can be found on the new wiki home page, [http://wiki.projectliberty.org/index.php/HR-EDU\\_SIG](http://wiki.projectliberty.org/index.php/HR-EDU_SIG).

■ The Council of Chief State School Officers will host a WebEx information session for states planning to apply for Statewide Longitudinal Data System (SLDS) grants (<http://ies.ed.gov/funding/>). It will be presented by Lee Hoffman, NCES Program Director; and Tate Gould, SLDS Grant Program Officer and will include an overview of the FY09 SLDS competition and provide an opportunity for questions and answers. The session will be held, Friday, September 5, 2008 from 2:00-3:30pm EST. To participate At the start of the meeting, visit <https://ccsso.webex.com/ccsso/j.php?ED=107392022&UID=0>, and follow the onscreen instructions.

■ The company Allied Business Intelligence recently released a business

analysis indicating that colleges will be early adopters of a wireless network standard called 802.11n, which is much faster and allows for more access points than today's Wi-Fi solutions. The company forecasts that 99 percent of universities in North America will have such networks by 2013.

■ Google engineer Laurence Gonsalves recently announced that, after several years of consideration, Google was releasing Google XML Pages (or GXP) under the Apache Open Source License. Originally developed as a Python interpreter that pro-

### **EDI Data Exchange Statistics July 2008 - UT Austin Server**

**Total Transcript:** 61,063

**Total Admission Application:**  
43,782

**Total Test Score:** 3,644

**Total Transcript Request:**  
14,069

**Total Acknowledgement:**  
49,187

**Total Functional  
Acknowledgement:** 13,941

**Total transaction sets:**  
190,082

duced Java source code, gxp was rewritten in 2006-2007 to be a completely Java based application. For more information about Google Pages and their specifications, <http://news.oreilly.com/2008/08/google-open-sources-google-xml.html>.

■ The European Commission has confirmed in 2009-2010 69 million Euro from the EU's research programme will go to digitisation activities and the development of digital libraries. In the same period, Europe's Competitiveness and Innovation Programme will allocate about 50 million Euro to improve access to Europe's cultural content. For more information, <http://europa.eu/rapid/pressReleasesAction.do?reference=IP/08/1255>

■ Federation identity solutions are a technical key that unlocks a myriad of business opportunities. But more business opportunities lay beyond the wall of the enterprise-with true value unlocked and realized when single federations federate with others, transactions occur across corporate boundaries, and organizations realize the same benefits from a policy basis as federated standards have delivered on the technical front. To answer this opportunity, on September 8, from 1:00 to 3:00 pm the Liberty Alliance will conduct an interactive workshop to review business drivers for the Framework, early adopters of its work, its links to NIST, and the emerging certification program that is being advanced to help define who offers what levels of assurance for identity-based interactions. Register for the workshop at [https://maa.projectliberty.org/ws/anaheim\\_sept08/index.html](https://maa.projectliberty.org/ws/anaheim_sept08/index.html).

■ The issue of how to bundle up and transport XML document sets, with their accompanying stylesheets and media, has a good solution with the XML-in-ZIP approach used by ODF, OOXML, and SCORM. But the issue of validation still remains. When the basic information is kept in a single XML file, validation is straightforward: the driver code needs to go through the document and either extract all XML files brute force, or be smart enough to identify just the files of interest for validating using whatever combination of namespace, relationship type, and phase. This is the kind of thing that, in the DSDL model, we are hoping that the validation processing standard will handle: we will be looking at W3C XProc for this. For more information, visit <http://news.oreilly.com/2008/08/the-challenge-of-validating-xm.html>.

■ Michael Sperberg McQueen dives into dereferencing namespaces. He discusses applications and demos failure to provide namespace documents, documents that are machine-readable without any human-comprehensible documentation and in others comments that there is useful human-readable description (sometimes only in a comment, but it's there) if you can find it. And for a few, there is something approaching a document intended to be accessible to a human reader. To explore with McQueen, visit <http://people.w3.org/~cmsmcq/blog/?p=70>.

■ The processing of XML documents has been regarded as the main performance bottleneck. On the other hand, multi-core processing gains increasingly popularity both on the desktop computers and server com-

puting machines. To take full advantage of multi-cores, a paper presenting a novel hybrid parallel XML processing model, which combines data-parallel and pipeline processing is available at <http://www.balisage.net/Proceedings/html/2008/Wu01/Balisage2008-Wu01.html>.

■ XML formats must often be updated for multiple organizations at the same time for competitive and market reasons. Maintaining just one XML schema is relatively simple. Making a change that affects several hundred organizations, however, can have an immense impact. A recent article discusses (1) How to manage this impact; (2) How to minimize this impact where possible. Visit, <http://www.ibm.com/developer-works/library/x-extensxml.html>.

■ On behalf of the W3C XML Core Working Group, John Cowan delivered a communication to the W3C XML Internationalization Core WG and Internationalization Interest Group (IG) on the question of using IRIs for XML namespace names. To read the comments in full, visit <http://lists.w3.org/Archives/Public/www-international/2008JulSep/thread.html#msg49>.

■ Depending on whom you talk to, XML is either the centralized solution for managing data sharing, or it's a bloated monster that's slowly taking over data storage. Technologies are evolving that can help with XML bloat. First is the evolution of platform-based XML solutions that offer a single system to author, tag, store and manage XML files. They also allow developers to set the policies for dynamic XML integration into other documents or applications. Second is the idea of XML file-size reduction. For more information, visit <http://www.gcn.com/online/>

## Get More Involved with PESC

Join our Steering Committee! As the entity that governs that standards development process, the workgroups, and the Change Control and Technical Advisory Boards, the Steering Committee is involved in all aspects of PESC. The Steering Committee can also serve as a stepping-stone to the PESC Board of Directors. Nominations for the Steering Committee open on Monday September 8, 2008 and close on Friday September 15, 2008. Representatives from Member organizations (with dues paid current) are eligible to serve on the Steering Committee. Interested? Sign up using the attached nomination form. If you have questions or concerns, please contact PESC Executive Director Michael Sessa at 202.261.6516 or at [michael.sessa@pesc.org](mailto:michael.sessa@pesc.org).

[vol1\\_no1/46861-1.html](http://www.xml.coverpages.org/xml/vol1_no1/46861-1.html).

■ A white paper, sponsored by EMC, observes that XML presents a number of interesting challenges and opportunities for data storage. A new class of databases has emerged that is designed to manage XML content. They incorporate functionality that greatly improves the management, searching, and manipulation of XML to produce the most effective XML data management solution. Visit, <http://xml.coverpages.org/xml/AndDatabases.html> #Gilbane-EMC-WaldtTrippel-XML.



**Fall 2008 PESC Member Summit  
Washington DC  
October 6 - 7, 2008**

**Sunday October 5, 2008**

|                   |                       |
|-------------------|-----------------------|
| 8:00 am - 5:00 pm | AACRAO SPEEDE Meeting |
|-------------------|-----------------------|

**Monday October 6, 2008**

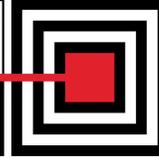
|                                            |                                                                                                                                                                         |
|--------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 7:30 am - 5:00 pm                          | Registration                                                                                                                                                            |
| 7:30 am - 8:30 am                          | Continental Breakfast                                                                                                                                                   |
| 8:30 am - 10:00 am<br>Concurrent Sessions  | <ol style="list-style-type: none"> <li>1. Electronic Transcript USER GROUP</li> <li>2. Steering Committee Meeting</li> <li>3. Board Subcommittee</li> </ol>             |
| 10:00 am - 10:15 am                        | Break                                                                                                                                                                   |
| 10:15 am - 12:00 pm<br>Concurrent Sessions | <ol style="list-style-type: none"> <li>1. Electronic Transcript USER GROUP</li> <li>2. Steering Committee Meeting</li> <li>3. Board Subcommittee</li> </ol>             |
| 12:00 pm - 1:30 pm                         | Lunch on Your Own                                                                                                                                                       |
| 1:30 pm - 3:00 pm<br>Concurrent Sessions   | <ol style="list-style-type: none"> <li>1. Electronic Transcript USER GROUP</li> <li>2. Change Control Board (CCB)</li> <li>3. Board of Directors Meeting</li> </ol>     |
| 3:00 pm - 3:15 pm                          | Break                                                                                                                                                                   |
| 3:15 pm - 5:00 pm<br>Concurrent Sessions   | <ol style="list-style-type: none"> <li>1. Electronic Transcript USER GROUP</li> <li>2. Technical Advisory Board (TAB)</li> <li>3. Board of Directors Meeting</li> </ol> |
| 5:30 pm - 6:30 pm                          | PESC Member Meeting                                                                                                                                                     |

**Tuesday October 7, 2008**

|                                            |                                                                                                                                                |
|--------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------|
| 7:30 am - 5:00 pm                          | Registration                                                                                                                                   |
| 7:30 am - 8:30 am                          | Continental Breakfast                                                                                                                          |
| 8:30 am - 10:00 am<br>Concurrent Sessions  | <ol style="list-style-type: none"> <li>1. PDF Transcript Workgroup</li> <li>2. EA2 Task Force</li> </ol>                                       |
| 10:00 am - 10:15 am                        | Break                                                                                                                                          |
| 10:15 am - 12:00 pm<br>Concurrent Sessions | <ol style="list-style-type: none"> <li>1. PDF Transcript Workgroup</li> <li>2. Seal of Approval</li> </ol>                                     |
| 12:00 pm - 1:30 pm                         | Lunch on Your Own                                                                                                                              |
| 1:30 pm - 4:00 pm<br>Concurrent Sessions   | <ol style="list-style-type: none"> <li>1. Degree Audit Workgroup</li> <li>2. Enhancing Interoperability for PESC exchanges with CAM</li> </ol> |

Celebrating Our 10<sup>th</sup> Anniversary in 2007

POSTSECONDARY  
Electronic Standards Council  
PESC.ORG



## NOMINATION FORM

# STANDARDS FORUM FOR EDUCATION Steering Committee

Elections to be held:  
October 6, 2008  
5:30pm - 6:30 pm EST  
Hyatt Regency  
Crystal City

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Nominee Full Name

---

Title and Organization

---

Street Address

---

City, State and Zip

---

Phone

Fax

E-mail Address

*Please complete this form and return it along with a brief bio of the nominee to PESC:*

**Postsecondary Electronic Standards Council**  
**1250 Connecticut Avenue NW**  
**Suite 200**  
**Washington DC 20036**  
Fax: 202-261-6517  
Email: [Michael.Sessa@PESC.org](mailto:Michael.Sessa@PESC.org)

**WWW.PESC.ORG**



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## **FFEL Business Process and Data Standardization - Project Update** **05/06/2008**

### **Project Update:**

Federal Student Aid continues to conduct a series of conference calls with the FFEL community workgroup. Calls are generally conducted weekly. This month the FFEL community workgroup continued to review the data elements discussed in the March 10 in-person meeting. The workgroup made significant progress and approved 17 additional data elements in the month of April.

As a result of some lengthy discussions during the FFEL Data Standards initiative, the workgroup decided to develop subgroups to focus on two specific topics. The first subgroup will focus on payment history and collection data. They will concentrate on Federal Student Aid's business needs for receiving lender payment and collection histories, guarantors' ability to provide lender payment history and collection data for loans where claims have been paid, and propose solutions to meet Federal Student Aid's business needs.

The Payment History Subgroup conducted its first meeting to establish their scope of work, and to review Federal Student Aid's business needs, the Common Claim Initiative (CCI) and associated data elements. The workgroup reviewed the current requirements for providing payment history during assignment and how the requirements were incorporated into the CCI process that was approved by the Department in December 2005. Subgroup members were asked to follow up with their respective organizations and return with suggestions for achieving the discussed payment history information needs and to determine the most appropriate sources for this information. The next meeting for the Payment History Subgroup will be the week of 5/12.

The second subgroup will concentrate on FFEL lender financial reporting. This subgroup will discuss ways to reduce the burden of lender financial reporting through the collection of aid-level data elements. The first meeting of this subgroup is planned for mid-May.

### **Current Status:**

To date the workgroup approved 44 data elements. The embedded file presents the data elements approved by the external workgroup as well as the definition, field length (FL) and field type (FT).

830 First St. N.E., Washington, DC 20202  
[www.FederalStudentAid.ed.gov](http://www.FederalStudentAid.ed.gov)  
1-800-4-FED-AID



Workgroup  
Approved Data Eleme

**Comments and responses:**

Questions regarding this report or companion documents referenced above can be directed to [DataStrategy@ed.gov](mailto:DataStrategy@ed.gov).

**Reviewed by:**

All external communication has been reviewed by the communication subgroup of the FFEL Data Standards Workgroup, presented in Table 1.

| <b>Member</b>  | <b>Organization</b>            |
|----------------|--------------------------------|
| Ron Bennett    | Federal Student Aid            |
| Jonathan Way   | Federal Student Aid Contractor |
| Mark Putman    | NCHELP                         |
| Mike Balogh    | NCHELP                         |
| Justin Draeger | NASFAA                         |

**Table 1: External Communication Subgroup**

**Reference Materials:**

Workgroup participant list



FFEL Data Standards  
Workgroup\_v1.0.doc

**Revision History:**

Created: May 6, 2008



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## **FFEL Business Process and Data Standardization - Project Update**

### **06/01/2008**

#### **Project Update:**

Federal Student Aid continues to conduct a series of conference calls with the FFEL community workgroup. Calls are generally conducted weekly. This month the FFEL community workgroup continued to review the data elements discussed in the March 10 in-person meeting. The workgroup made significant progress and approved 13 additional data elements in the month of May.

As a result of some lengthy discussions during the FFEL Data Standards initiative, the workgroup decided to develop subgroups to focus on two specific topics. The first subgroup will focus on payment history and collection data. The second subgroup will focus on lender financial reporting. The overall purpose of both subgroups is to work collaboratively with the FFEL Community to meet Federal Student Aid's business needs (e.g., substantiation) without causing an undue reporting hardship on the FFEL Community. The remainder of this section details the progress and work to date for each of the subgroups.

In May, the Payment History Subgroup conducted its second meeting. The subgroup's discussions center on Federal Student Aid's business needs for receiving lender payment and collection histories, guarantors' ability to provide lender payment history and collection data for assigned loans and propose solutions to meet Federal Student Aid's business needs. Federal Student Aid's business need for payment history and collection data at the time of assignment is to substantiate principal and interest amounts outstanding for borrowers with data that is not collected on the assignment form. In the first meeting, subgroup members were asked to follow up with their respective organizations and return with suggestions for achieving the discussed payment history information needs and to determine the most appropriate sources for this information. In the subsequent meeting, the subgroup members reviewed the Common Claim Initiative (CCI) approved by ED on 12/19/2005 as well as the Claim Form. The CCI captures summary-level information provided on the Claim form:

- The total borrower payment amount
- Number of months satisfied by payments
- Capitalized interest
- Total amount applied to principal
- Payments received during due diligence

During the second meeting, the subgroup members brought back a suggestion to provide Federal Student Aid with summary-level information from the CCI when a loan

830 First St. N.E., Washington, DC 20202  
[www.FederalStudentAid.ed.gov](http://www.FederalStudentAid.ed.gov)  
1-800-4-FED-AID

is assigned and snapshots of pertinent data for lender payment history provided on the Claim form. Additionally, NSLDS or its successor will receive guarantor collection data (e.g., treasury offsets, wage garnishments and voluntary payments) at the aid-level and will pass the collection history to Federal Student Aid’s Debt Collections Group at the time of an assignment request.

The second subgroup is concentrating on FFEL lender financial reporting. This subgroup will discuss ways to:

- Reduce the burden of lender financial reporting through the collection of aid-level data elements;
- Substantiate invoices
- Budget forecasts and expenditures by cohort.

At the end of May the subgroup conducted its first meeting. During the first meeting, the participants reviewed the purpose, objectives and next steps for the subgroup. The group discussed Federal Student Aid’s business needs for capturing lender financial information that is not provided on the LaRS (ED Form 799). Subgroup members were asked to follow up with their respective organizations and return with suggestions in mid-June with a proposed solution that meets the Department of Education’s need to forecast the total cost of a loan. Subsequent meetings will focus on proposed solutions to provide Federal Student Aid with data to substantiate invoices.

**Current Status:**

To date the workgroup approved 57 data elements. The embedded file presents the data elements approved by the external workgroup as well as the definition, field length (FL) and field type (FT).



**Comments and responses:**

Questions regarding this report or companion documents referenced above can be directed to [DataStrategy@ed.gov](mailto:DataStrategy@ed.gov).

**Reviewed by:**

All external communication has been reviewed by the communication subgroup of the FFEL Data Standards Workgroup, presented in Table 1.

| Member         | Organization                   |
|----------------|--------------------------------|
| Ron Bennett    | Federal Student Aid            |
| Jonathan Way   | Federal Student Aid Contractor |
| Mark Putman    | NCHELP                         |
| Mike Balogh    | NCHELP                         |
| Justin Draeger | NASFAA                         |

**Table 1: External Communication Subgroup**

**Reference Materials:**

Workgroup participant list



FFEL Data Standards  
Workgroup\_v1.0.doc

**Revision History:**

Created: June 1, 2008



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## **FFEL Business Process and Data Standardization - Project Update** **07/01/2008**

### **Project Update:**

Federal Student Aid continues to conduct a series of conference calls with the FFEL community workgroup. This month the FFEL community workgroup continued to review loan-level data elements. The workgroup is nearing completion of the review of loan-level data elements and approved 30 additional data elements in the month of June. As the workgroup approaches the finish line for loan-level data elements, they will begin to focus on identifying opportunities to streamline and utilize data standards for financial reporting.

In mid-July, the group will review notional samples of XML schemas. These samples of XML schemas will provide an example of how reusable XML data elements, that have been approved, fit into an overall XML schema. Additionally, in July the workgroup will discuss guaranty agency financial reporting improvement opportunities by leveraging FFEL loan-level data standards.

As a result of some lengthy discussions during the FFEL Data Standards initiative, the workgroup decided to develop subgroups to focus on two specific topics. The first subgroup focuses on payment history and collection data. The second subgroup focuses on lender financial reporting. The overall purpose of both subgroups is to work collaboratively with the FFEL Community to meet Federal Student Aid's business needs (e.g., substantiation) without causing an undue reporting hardship on the FFEL Community. The remainder of this section details the progress and work to date for each of the subgroups.

The Payment History subgroup's discussions center on Federal Student Aid's business needs for receiving lender payment and collection histories, guarantors' ability to provide lender payment history and collection data for assigned loans and propose solutions to meet Federal Student Aid's business needs. Federal Student Aid's business need for payment history and collection data at the time of assignment is to substantiate principal and interest amounts outstanding for borrowers with data that is not collected on the assignment form. During the month of June, the Payment History subgroup did not meet. However, as a result of the Payment History subgroup's second meeting in May, data elements from the claim form were added to the list of data elements for review by the external workgroup. Data elements that have been approved by the external workgroup are:

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- TotalPaymentAmount: This basic component specifies the total amount of payments made by or on behalf of the borrower.
- NumberOfInstallmentsPaid: This basic component specifies the number of installments the due date was advanced because of payments made by or on behalf of the borrower.
- NumberOfInstallmentsDeferred: This basic component specifies the number of regular installments deferred.
- NumberOfInstallmentsForborne: This basic component specifies the number of regular installments forborne.

The Lender Financial Reporting subgroup is concentrating on FFEL lender financial reporting. This subgroup discusses ways to:

- Reduce the burden of lender financial reporting through the collection of aid-level data elements
- Substantiate invoices
- Budget forecasts and expenditures by cohort

The Lender Financial Reporting subgroup conducted one meeting in the month of June to discuss scheduling of future meetings. For the next meeting in July, the subgroup members were asked to follow up with their respective organizations and return with a proposed solution that meets the Department of Education’s need to forecast the total cost of a loan. Subsequent meetings will focus on proposed solutions to provide Federal Student Aid with data to substantiate invoices.

**Current Status:**

To date the workgroup approved 87 data elements. The embedded file presents the data elements approved by the external workgroup as well as the definition, field length (FL) and field type (FT).

Workgroup  
Approved Data Elements

**Comments and responses:**

Questions regarding this report or companion documents referenced above can be directed to [DataStrategy@ed.gov](mailto:DataStrategy@ed.gov).

**Reviewed by:**

All external communication has been reviewed by the communication subgroup of the FFEL Data Standards Workgroup, presented in Table 1.

| Member         | Organization                   |
|----------------|--------------------------------|
| Ron Bennett    | Federal Student Aid            |
| Jonathan Way   | Federal Student Aid Contractor |
| Mark Putman    | NCHELP                         |
| Mike Balogh    | NCHELP                         |
| Justin Draeger | NASFAA                         |

**Table 1: External Communication Subgroup**

**Reference Materials:**

Workgroup participant list



FFEL Data Standards  
Workgroup\_v1.0.doc

**Revision History:**

Created: July 1, 2008



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## **FFEL Business Process and Data Standardization - Project Update** **08/01/2008**

### **Project Update:**

In the month of July Federal Student Aid and the FFEL community workgroup completed its review of aid-level data elements. In total, the FFEL community workgroup participated in 23 meetings and conference calls to review the loan-level data elements. As a result, 98 loan-level data elements were approved to support Federal Student Aid's target state business needs.

In mid-July, the group reviewed samples of XML schemas. These XML schemas demonstrated how the reusable XML data elements that have been approved by the workgroup would fit into an overall XML schema. Federal Student Aid plans on providing the sample XML schemas in the August update. A complete list of approved data elements and data mapping of those elements to currently collected data from the Assignment Form and NSLDS Reporting will also be provided.

During the final workgroup meeting in July, the workgroup discussed opportunities to leverage FFEL loan-level data standards to improve guaranty agency financial reporting. The workgroup discussed ways to utilize loan-level data elements to calculate aggregate numbers reported on the annual and monthly guaranty agency financial report. The workgroup agreed that many of the annual and monthly elements could be calculated from loan-level data elements but require a more thorough analysis. A separate workgroup would be needed to delve deeper into the financial report to ensure accuracy in aggregate calculations based on loan-level data. As this initiative would be reliant on the collection of target state loan-level data elements, it is not envisioned to begin until the loan-level data elements pass the PESC change control board (CCB).

Of further note, the Lender Financial Reporting subgroup is concentrating on FFEL lender financial reporting. This subgroup has discussed ways to:

- Reduce the burden of lender financial reporting through the collection of aid-level data elements
- Substantiate invoices
- Provide budget forecasts and expenditures by cohort

They held one meeting in the month of July to discuss a proposed solution to meet the Department of Education's need to forecast the total cost of a loan. The solution was to add a column into the (Lender's Request for Payment of Interest and Special Allowance (LaRS) form to capture cohort year information on loans for parts 1-3. A subsequent

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meeting is planned for August that will focus on proposed solutions to provide Federal Student Aid with data to substantiate invoices.

**Current Status:**

To date the workgroup approved 98 data elements. The embedded file presents the data elements approved by the external workgroup as well as the definition, field length (FL) and field type (FT).



Workgroup  
Approved Data Eleme

**Comments and responses:**

Questions regarding this report or companion documents referenced above can be directed to [DataStrategy@ed.gov](mailto:DataStrategy@ed.gov).

**Reviewed by:**

All external communication has been reviewed by the communication subgroup of the FFEL Data Standards Workgroup, presented in Table 1.

| <b>Member</b>  | <b>Organization</b>            |
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| Mark Putman    | NCHELP                         |
| Mike Balogh    | NCHELP                         |
| Justin Draeger | NASFAA                         |

**Table 1: External Communication Subgroup**

**Reference Materials:**

Workgroup participant list



FFEL Data Standards  
Workgroup\_v1.0.doc

**Revision History:**

Created: August 1, 2008