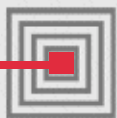


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POSTSECONDARY  
Electronic Standards Council



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Volume 7 ~ Issue 2 ~ February 2006

## Data Transport Workgroup Proposes Specification for Standard

On June 23, 2005, the Data Transport Workgroup submitted a Letter of Intent notifying PESC and the education community of its desire to develop a specification that would be approved and recognized as an education-wide community standard. The need and a significant foundation for the specification were born out of the National Council of Higher Education Loan Program's (NCHELP) Electronic Standards Committee (ESC) and the workgroup was officially formed under the Standards Forum for Education.

Together, the ESC, PESC's Standards Forum for Education, and the American Association of Collegiate Registrar and Admissions Officer's (AACRAO) Standardization of Postsecondary Education Electronic Data Exchange, SPEEDE, and the entire education community have worked closely over the past few years to develop an objective, sound process for

See Workgroup, Page 2

## High School Transcript Workgroup Proposes XML Standard

On April 18, 2005, the High School XML Transcript Workgroup submitted a Letter of Intent notifying PESC and the education community of its desire to develop a specification that would be approved and recognized as an education-wide community standard. The need and a significant foundation for the specification were born out of the American Association of Collegiate Registrars and Admissions Officer's (AACRAO) Standardization of Postsecondary Education Electronic Data Exchange (SPEEDE) Committee and the workgroup was officially formed under the Standards Forum for Education.

Together, the National Council of Higher Education Loan Program's (NCHELP) Electronic Standards Committee (ESC), PESC's Standards Forum for Education, the Office of Federal Student Aid of the U.S.

See Transcript, Page 3

## Workgroup, From Page 1

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approving standards (see <http://www.PESC.org/info/Policies-Procedures.asp>.) With the development work completed and submitted on February 6, 2006, the Data Transport Specification is now immediately ready for public comment period.

The public comment period began Friday, February 17, 2006 and will be thirty (30) calendar days. Public comment period expires at the close of business on Monday March 20, 2006. All comments, from the PESC Membership and the public, shall be made in the form of an e-mail to the PESC Executive Director at: [Sessa@PESC.org](mailto:Sessa@PESC.org). The comment e-mail should clearly identify the:

- 1) Responder name and appropriate contact information;
- 2) Source of the comments, i.e., whether the comments are individual or represent those of a group the responder represents;
- 3) Nature of the responder's interest in the standard (what is the issue and why is it important?);
- 4) Element(s) of the proposed standard with which issue is taken;
- 5) Changes suggested to resolve the issue(s).

The Submission Letter, Business Case and History Letter, PESC Response Letter and specification are all posted to the PESC website at [www.PESC.org/workgroups/datatransport/](http://www.PESC.org/workgroups/datatransport/).

Within 30 calendar days after the close of the public comment period, the Change Control Board (CCB) of the Standards Forum for Education will address and consider all public comments and make, in consultation with the Data Transport Workgroup, any necessary revisions. All public comments will be posted to the PESC website during the review process. The CCB's consideration/revision period expires on April 19, 2006 unless extenuating circumstances exist which require further deliberation.

Once any changes resulting from the public comment period have been incorporated, the CCB will recommend to the Standards Forum's Steering Committee and the PESC Board of Directors that the Specification be submitted to a vote by the PESC Members. The Board will have seven calendar days to approve the submission or refer it back to the CCB with specific instructions for further work. The PESC office will issue electronic ballots to the official contacts of voting Member organizations.

Completed ballots, including the reason(s) for any rejection, shall be returned to the PESC office via e-mail attachment, fax, overnight delivery, or U.S. Postal Service within ten business days. PESC staff is responsible for the tabulation of the ballots; acceptance of the Specification as a standard requires an affirmative vote of at least 80 percent of all votes cast.

Once the Members accept the Specification, the Board of Directors will within seven calendar days ratify the vote, publish/post all necessary documents and communications, and implement version control on all documents. Approved standards are freely accessible on the PESC website.

## New Members

PESC Welcomes the following new organizations to its membership.

**National Transcript Center**  
PESC contact is Barbara S. Clements,  
Chief Standards Officer.  
[www.TranscriptCenter.com](http://www.TranscriptCenter.com)

**Transcript, From Page 1**

Department of Education, and SPEEDE, and the entire education community have worked closely over the past few years to develop an objective, sound process for approving standards (see <http://www.PESC.org/info/Policies-Procedures.asp>.)

With the development work completed and submitted on January 23, 2006, the High School XML Transcript is now immediately ready for public comment period.

The public comment period begins Thursday February 23, 2006 and will be thirty (30) calendar days. Public comment period expires at the close of business on Monday March 27, 2006. All comments, from the PESC Membership and the public, shall be made in the form of an e-mail to the PESC Executive Director at: [Sessa@PESC.org](mailto:Sessa@PESC.org). The comment e-mail should clearly identify the:

- 1) Responder name and appropriate contact information;
- 2) Source of the comments, i.e., whether the comments are individual or represent those of a group the responder represents;
- 3) Nature of the responder's interest in the standard (what is the issue and why is it important?);
- 4) Element(s) of the proposed standard with which issue is taken;
- 5) Changes suggested to resolve the issue(s).

The Submission Letter, Business Case and History Letter, PESC Response Letter, implementation guide and XML Schema are all posted to the PESC website [www.pesc.org/workgroups/hstranscript/](http://www.pesc.org/workgroups/hstranscript/).

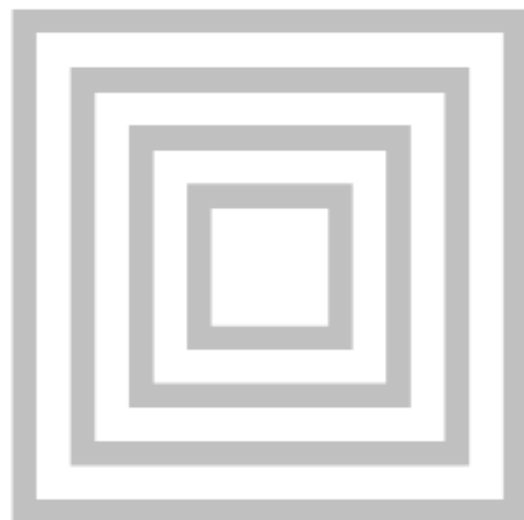
Within 30 calendar days after the close of the public comment period, the Change Control Board (CCB) of the Standards Forum for Education will address and consider all public comments and make, in consultation with the High School Workgroup, any necessary revisions. All public comments will be posted to the PESC website during the review process. The CCB's

consideration/revision period expires on April 26, 2006 unless extenuating circumstances exist which require further deliberation.

Once any changes resulting from the public comment period have been incorporated, the CCB will recommend to the Standards Forum's Steering Committee and the PESC Board of Directors that the High School Transcript be submitted to a vote by the PESC Members. The Board will have seven calendar days to approve the submission or refer it back to the CCB with specific instructions for further work. The PESC office will issue electronic ballots to the official contacts of voting Member organizations.

Completed ballots, including the reason(s) for any rejection, shall be returned to the PESC office via e-mail attachment, fax, overnight delivery, or U.S. Postal Service within ten business days. PESC staff is responsible for the tabulation of the ballots; acceptance of the High School Transcript as a standard requires an affirmative vote of at least 80 percent of all votes cast.

Once the Members accept the High School Transcript, the Board of Directors will within seven calendar days ratify the vote, publish/post all necessary documents and communications, and implement version control on all documents. Approved standards are freely accessible on the PESC website.



## 3rd Annual Conference on Technology and Standards

Session titles and descriptions are now posted for the 3rd Annual Conference on Technology and Standards hosted by CBA, EFC, NCHELP, and PESCS.

Please remember that early bird registration ends Wednesday, March 29, 2006. Members and/or Affiliates from any of the four associations are eligible for the discounted registration rate of \$475. The non-Membership rate is \$700. After March 29, 2006, regular rates increase to \$625 for Members and/or Affiliates from any of the four associations and \$850 for non-Membership.

Hotel reservations can be made now by contacting the Wyndham Washington directly at 202-429-1700 or 800-996-3426 or online at [www.Wyndham.com](http://www.Wyndham.com). The Wyndham Washington is located at 1400 M Street NW in Washington, D.C. A conference rate of \$180 has been reserved for single/double hotel rooms. If calling for reservations, the group name is "PESCS"; for online reservations, use "0426648POS." The cut-off date to receive this discounted rate is April 10, 2006. Conference registration is also available online at <http://www.PESCS.org/events/TechStandards/Third/>.

## University of Texas at Austin Internet Server Seeks Security

Effective March 1, 2006 PGP encryption or SFTP will be required for all transmissions through the UT SPEEDE Server. We are also investigating use of FTPS as a secured method. If you're interested in testing FTPS, please contact SPEEDE Server Admin at [regist@ediserver.reg.utexas.edu](mailto:regist@ediserver.reg.utexas.edu).

Time has come for us to require all transmissions via the Server be secured. We have been mentioning this pending requirement for the past year at our AACRAO meetings and have made several hardware and software upgrades to aid adoption of current encryption methods.

See <http://www.utexas.edu/student/giac/speede/ediserv.html> for more details.

In addition, due to routine system upgrades, effective Monday, February 6, 2006, transmissions from the UT SPEEDE Server will originate from a different IP address than present. If you have firewalls in place regulating deliveries based on IP address, you will need to plan for this upgrade. To obtain this new IP address or for more information, please contact SPEEDE Server

Admin at [regist@ediserv.reg.utexas.edu](mailto:regist@ediserv.reg.utexas.edu).

We appreciate your understanding regarding this change and the value of securing educational records.

### UT Austin Internet Server

### 'SPEEDEs' Along

January 2006 volume included:

- 81,373 TS130 transcripts  
\* highest number in any one month, ever.
- 54,433 TS131 acknowledgements
- 15,010 TS997 Functional acknowledgements
- 82,805 TS189 Admission Applications  
\* highest number in any one month, ever.
- 18,022 TS138 test score reports
- 289,393 total transactions for January 2006  
\* highest number in any one month, ever.

## PESC Board of Directors

### Nomination and Election Process

As you may know, elections for the PESC Board of Directors are conducted each year at the Annual Membership meeting held during the Annual Conference on Technology and Standards. This year elections will be conducted during PESC's 8th Annual Membership Meeting scheduled for Monday May 1, 2006 from 4:30 pm – 5:30 pm EST at the Wyndham Washington Hotel (1400 M Street NW, Washington DC, 20005). Membership meetings are open to all PESC Members and Affiliates, and with prior notification, other interested parties. To provide continuity, the 2-year terms of Board members are staggered so that only half the Board is up for election this year and the other half is up for election next year (5 out of 10 seats). In preparation for the elections, PESC has established the following process:

Tuesday, March 1,	Nominations Open
Friday, April 7	Nominations Close
Tuesday, April 11	Proxy Ballots Issued
Wednesday, April 26	If not attending the Membership Meeting in person, this is the date by

Monday, May 1

which Proxy Ballots must be received in PESC's offices  
Elections held 4:30 p.m. EST

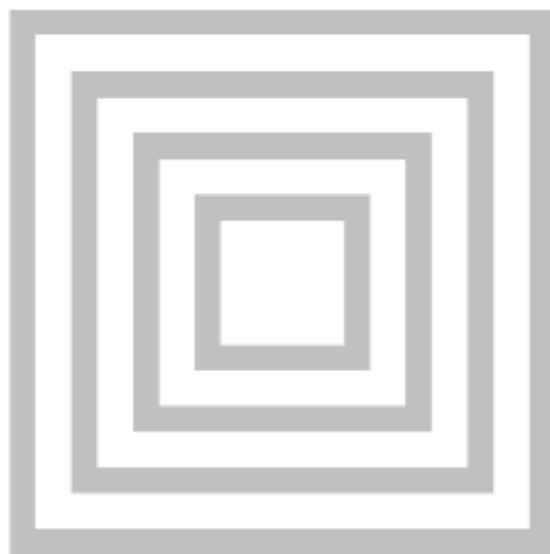
NOTE: If attending the 8th Annual Membership Meeting in person, Proxy ballots can still be submitted and then can either be replaced with an official vote on Monday May 1, 2006 or remain as the official vote.

Representatives from MEMBER organizations (with dues paid current) are eligible to serve on the Board of Directors. The term of service is two years and runs July 1, 2006 – June 30, 2008. Nominations should be made with the form on page 8 and submitted to Michael Sessa at Sessa@PESC.org. When nominating, please ensure that the nominee is aware that a nomination is being made. Nominees will be expected to submit a short BIO and are provided with an opportunity to address the membership at the beginning of the 8th Annual Membership Meeting on Monday, May 1, 2006 at 4:30 p.m. EST.

#### Sponsorship Opportunities Still Available

Sponsorship Opportunities are still available for the 3rd Annual Conference on Technology and Standards. Sponsors that have committed at this time include: AES, infiNET, NASLA, Nelnet, SLSA, and SunGard SCT Higher Education.

For information about Sponsorship, please visit <http://www.PESC.org/events/TechStandards/Third/> or contact Jennifer Kim at [kim@PESC.org](mailto:kim@PESC.org) or 202-263-0296.



## “ONE” Standard

The higher education community, pK12 community, and US Department of Education have joined forces to begin the effort of standardizing data across the entire education enterprise.

Rather than view students or data in silos or stovepipes (like elementary or postsecondary), leaders are now exploring the possibility of one set of standard core components across the entire student lifecycle from pre-kindergarten (“pK”) through masters and advanced studies – (“20th”) grade – pK20.

This effort is being lead by a group called the Data/XML Steering Committee (DXSC) which includes representatives from PESC, SIFA, and various departments and agencies within the US Department of Education including Federal Student Aid, NCES, CFO, CIO, and EDEN.

While development and actual implementation of

ONE standard will take years, significant progress has already been accomplished. A level of awareness has been created within the US Department of Education and there is agreement on the common goal. At the latest monthly meeting held Wednesday February 15, 2006, the DXSC reviewed the PESC Guidelines for XML Architecture and Data Modeling as a potential model or a best practice.

While Federal Student Aid follows the PESC Guidelines for XML Architecture and Data Modeling, the DXSC is not prepared to immediately submit a formal best practice recommendation for the PESC Guidelines for XML Architecture and Data Modeling as DXSC members still need to become more familiar with this document. The DXSC will plan on revisiting this PESC document as a potential best practice recommendation before the end of calendar year 2006.

# Technology Tidbits

## *and Standards Snippets*

■ **A group of education-technology experts has issued an annual report on what they see as emerging trends**, according to The Chronicle of Higher Education. The buzzwords this year, they say, are “social computing,” such as the use of Facebook and the like that let users tag content, and “personal broadcasting,” such as podcasting and video blogging. In the next few years, look for an upsurge in the use of cell phones for education, the report says, as well as an increased use of educational video games at the college level. Two other trends to watch for are “content-aware devices,” such as cell phones that turn themselves off automatically when they sense they are in a classroom during a class session, and “enhanced visualization,” or ways to bring to life complex data sets in visual forms.

■ **Congress is about to do away with the 50-percent rule, which prevents schools offering more than 50 percent of its programs via the internet, from offering federal student aid.** The result may be a boom in distance education. (The Chronicle, subscription required)  
<http://chronicle.com/wiredcampus/index.php?id=979>

■ **Bank of America Corp., Bank of New York Co., Citigroup Inc., J.P. Morgan Chase & Co., U.S. Bancorp, Wells Fargo & Co. recently announced a collective effort to pressure computer-service providers to be more systematic about disclosing what they are doing to protect sensitive data,** accord-

ing to the Wall Street Journal. The banks, backed by a financial-services industry group and major accounting firms, are adopting common guidelines that their suppliers – including telecommunications companies and data-service hosting companies such as IBM – will have to follow.

■ **If colleges hope to succeed in the changing economy, they must team up with industry and embrace new technologies,** panelists told the Secretary of Education's Commission on the Future of Higher Education, according to The Chronicle of Higher Education. "The world is changing a lot, and higher education has not responded to those changes," said David Wiley, an assistant professor at the Center for Open and Sustainable Learning at Utah State University. "As science drifts further from where higher education stands, higher education starts to lose its value."

■ **The Massachusetts Institute of Technology plans to hook Cambridge up with free wireless Internet service.** Mary P. Hart, chief information officer for the city, said she expected the project to be complete by the end of the year, according to The Chronicle of Higher Education.

■ **Researchers at the University of Washington scoured about 20 million websites for executable and found that one in 20 of those files contained piggybacked soft-**

**ware known as spyware.** Much of that software merely activated annoying, but fairly harmless, pop-up advertisements. But about 14 percent of the piggybacked files could do serious damage when downloaded, according to the study. For more information, visit <http://chronicle.com/wiredcampus/index.php?id=993>

■ **OASIS members recently approved WS-Security version 1.1 as an OASIS Standard.** Developed through an open process by the OASIS Web Services Security (WSS) Technical Committee, WS-Security delivers a technical foundation for implementing security functions such as integrity and confidentiality in messages implementing higher-level Web services applications. WS-Security lets users apply existing security technology and infrastructure in a Web services environment.

■ **Colleges' spending on information technology is expected to set a record this academic year,** a new study concludes. A report on the study, by Market Data Retrieval, estimates that colleges will spend \$6.94-billion on information technology this year, which is 35 percent more than last year, according to The Chronicle of Higher Education. The average technology budget at colleges over all is \$1.4-million, according to the report. The report, "The College Technology Review," is based on a survey, conducted in October, that drew responses from 1,176 college administrators, representing a 21-percent response rate.



# NOMINATION FORM

## PESC BOARD OF DIRECTORS

Elections to be held:  
May 1, 2006  
4:30 pm – 5:30 pm EST  
Wyndham Washington DC  
1400 M Street NW  
Washington, D.C. 20005

---

Nominee Full Name

---

Title and Organization

---

Street Address

---

City, State and Zip

---

Phone

Fax

E-mail Address

*Please complete this form and return it to PESC:*

**Postsecondary Electronic Standards Council**  
**One Dupont Circle NW**  
**Suite 520**  
**Washington DC 20036**  
Fax: 202-872-8857  
Email: [Sessa@PESC.org](mailto:Sessa@PESC.org)

**WWW.PESC.ORG**





## **Electronic Authentication Partnership Elects Board of Directors**

**Contact:** Jane Hennessy  
Phone: 415/222-5000  
E-mail: [hennessj@wellsfargo.com](mailto:hennessj@wellsfargo.com)

**Herndon, Virginia, January 13, 2006** – The Electronic Authentication Partnership (EAP) — a public/private partnership to enable interoperability for electronic identity authentication among public and private sector organizations—has elected Directors to its Board for 2006-2007. The new Board members took are:

- Michael Aisenberg, Director of Government Relations, VeriSign, Inc.
- Paula Arcioni, Identity Management Services Program Manager, State of New Jersey
- Richard Carter, Director, Technical Standards and Programs, American Association of Motor Vehicle Administrators
- Jane Hennessy, Senior Vice President, Wells Fargo
- John Landwehr, Director, Security Solutions and Strategy, Adobe Systems, Incorporated
- Elliott C. McEntee, President and CEO, NACHA—The Electronic Payments Association
- Michael D. Sessa, Executive Director, Postsecondary Electronic Standards Council
- Javier Vasquez, Federal Program Manager, Identity Manager, Microsoft Corporation

In addition to newly elected and appointed Board Members, seven existing Board members will remain:

- Catherine A. Allen, CEO, BITS
  - James DeVaul, Partner, Risk and Advisory Services, KPMG
  - Glen Gainer, III, State Auditor, West Virginia State Auditor's Office
  - Gabe Minton, Vice President, Industry Technology, Mortgage Bankers Association
  - Jack Radzikowski, Director, Commercial Identity Management Practice, Northrop Grumman
  - Bill Smith, Director, Business Alliances, Sun Microsystems, Inc.
-

- David Temoshok, Director, Identity Policy/Management, U.S. General Services Administration

“The EAP is entering a critical phase—moving from concept to reality,” said EAP Chairman Jane Hennessy. “This Board will shape identity assurance policy for both the private and public sectors for years to come. I’m confident that this stellar group of industry leaders possesses the expertise, skills, and insight we need to move us successfully through the next phase and beyond.”

The goal of EAP is to provide organizations with a trusted means of relying on digital credentials issued by a variety of e-authentication systems.

For more information on the EAP or to become a member, visit [www.eapartnership.org](http://www.eapartnership.org).

XXX

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## 4th AACRAO Student Services Technology Conference

### CALL FOR PROPOSALS AND NEW MEETING DATES! JULY 23-25, 2006 DENVER, COLORADO

Presenters and proposals are now being accepted for the fourth annual AACRAO Technology Conference. Scheduled July 23-25, 2006 at the Grand Hyatt Denver, in Denver, Colorado, this year's conference will focus on improving student services through technology.

#### Why are we moving to July?

Past AACRAO Technology Conferences have been held in October -- a very busy time of year. Many AACRAO members have told us they would like to attend but could not because of scheduling conflicts with other meetings. Therefore we are moving the conference to July to broaden participation.

#### Call for Proposals

The 2006 AACRAO Student Services Technology Conference will bring together technology practitioners and managers from admissions, bursar, enrollment management, financial aid, and registrar organizations. We seek presentation proposals-targeted for hands-on technology practitioners or for student services managers-in the following areas:

- Innovative Applications of Technology to Improve Services
  - Open/Community Source Applications
  - ERP Implementation & Management
    - Document Imaging & Storage
    - Workflow
  - Emerging Technologies
  - Data Warehouse & Reporting
  - Identity & Access Management
  - Web Applications & Services
    - XML & EDI

*Priority Submission Deadline: February 10, 2006*

Note: we may consider proposals submitted after this deadline up to March 10. Each session selected will yield one complimentary conference registration. Presenters are asked to submit copies of their presentation slides or handouts prior to the conference, to be made available via the Web. The online session proposal form for non-corporate presentations is located at <http://www.aacrao.org/tech06/>

#### Questions?

Program: Questions may be addressed to Jeff von Munkwitz-Smith, AACRAO Technology Conference Director, at [tech@aacrao.org](mailto:tech@aacrao.org)  
Corporate Participation (presentations, exhibits, sponsorships): Contact Natalia Jimenez, Marketing, at (202) 293-9161 ext. 6102 or [jimenezn@aacrao.org](mailto:jimenezn@aacrao.org)  
Other: E-mail [meetings@aacrao.org](mailto:meetings@aacrao.org)

Additional details on the Call for Proposals and the AACRAO Technology Conference are available at: <http://www.aacrao.org/tech06/>



# CommoNews

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## CR:C Controlled Test – Next Steps

*Kyle Smith, TGSLC*

The Origination Standards Advisory Team (OSAT) recently completed the first ever industry controlled test of the CommonLine standard. ESC membership requested a controlled industry test to ensure a smooth transition and implementation of CR:C for all participants. Organizations that were a part of the testing team are: Sigma Systems, AES, USA Funds, ASA, US Bank, Sallie Mae, Citibank and Nelnet.

**The Test:** The controlled test was based on CR:C version 1.0.6, the baseline version approved as of July 2005. The objectives of the test were:

- *To refine* the CR:C Implementation Guide and Testing Tool,
- *To prevent* a constant trickling of changes to the Implementation Guide, Testing Tool and schemas, and
- *To ensure* that CR:C participant systems were accurately coded to the CR:C baseline standard as intended.

*(continued on next page)*

## Message from the Chairs

*Brian Allison, USA Funds  
Bob King, Citibank*

What a difference a decade makes!! As midnight on this past December 31st passed it brought recollection that 6 years already have passed since the huge Y2K effort that consumed so much of our collective attention, and that ten years have passed since our first roll-outs of the CommonLine origination standards.

The coming years should be no less active or exciting or challenging as the Electronic Standards Committee now tackles the changes that will be required by the Deficit Reduction Act, continues to move the community toward adoption of the CRC standard, and addresses other standards needs as they rise.

Perhaps most exciting is the fact that the Common Record: CommonLine standard was recently approved by the membership of the Postsecondary Electronic Standards Council. Additionally, excellent progress was made with CRC over the last few months with the completion of the Industry Beta Test so well supported by Sigma Systems, ASA, AES, Nelnet, Sallie Mae, USA Funds and US Bank. This resulted in the changes that took us to version 1.1 of the standard and resulted in improvements to the CRC Test Tool.

There were also important efforts concerning the Common Claim Initiative and updates to the CAM standard.

Thank you to everyone that contributed your expertise and time to support these efforts and to keep your organizations informed and involved.

### **CR:C Controlled Test – Next Steps (continued)**

Testing followed the sequence of the life of the loan. The controlled test lasted a total of 13 weeks. A secure SharePoint was developed on NCHELP's website to drop and retrieve test documents and log issues. A total of 458 documents including a total of 1,202 test scenarios were successfully tested. Issues were resolved daily.

### **Documents Tested**

- Stafford loan and certification requests (single and combined subsidized / unsubsidized)
- PLUS and Alternative loan requests
- Guarantor and lender flows for all processing types: PO, PG, GO, GP, CO and CP
- Pre-guarantee corrections for all loan types
- Post-guarantee changes pre- and post-disbursement
- Disbursement Rosters and Forecast documents

### **Findings**

A total of 78 issues were uncovered including clarification questions on "how to", and requirements changes to the CR:C Implementation Guide, Testing Tool and schemas. The most critical discovery was differing interpretations on the formation of Rejected Responses. The CR:C Implementation Guide v.1.1.0 was modified to reflect the revised method for which to report Rejected Response information and a new CR:C error code was developed to indicate when an entire block of data is not processed by the service provider. Other issues included organizations attempting to emulate flat file format by creating Snapshot Responses containing empty or zero filled tags. End of Line Markers were not being created properly. Further clarification was needed on the namespace definition, Note Message creation, and Response

Messages. Several data elements in the Certification Request layout had to be changed from required to optional.

Post-guarantee change requests including demographic changes required clarification to raise school awareness that a Snapshot Response with demographic changes may indicate accepted by the service provider. Two new error codes were added to the CR:C Implementation Guide to allow service providers to notify the sender when the change function was processed manually or will be forwarded to another organization. Finally, the CR:C Implementation Guide and schema were updated to indicate both "Forwarded" and "Forwarding" values.

### **Lessons Learned**

Without a doubt the controlled test participants unanimously agree that the test was extremely beneficial to the FFEL industry. The team confirmed that the CR:C Implementation Guide, Testing Tool and schemas support the new CR:C process.

The following are testing team recommendations to organizations as they move forward with CR:C implementation:

- CR:C version 1.1.0 must be adopted as the baseline version for industry development purposes.
- Utilization of the CR:C Testing Tool for the purpose of schema validation is crucial.
- Business analysts and developers should engage in discussions with their trading partners during system development.
- Entities should perform their first external test with one of the CR:C controlled test team participants.
- Schools and their FAMS vendors should test all supported functions with all of their service providers prior to implementation.

***(Continued on next page)***

**CR:C Controlled Test – Next Steps  
(continued)**

- Organizations must have dedicated testing resources.
- All business and technical resources must read the front matter and the layouts in both the CR:C Implementation Guide and Testing Tool.
- Establish ground rules for trading documents up front.
- Utilize the ESC CR:C Issues Log process to get answers to your questions.

**Next Steps**

As recommended by the CR:C Controlled Test team in October 2005 the ESC voting membership adopted CR:C version 1.1.0 as the baseline version that any organization can take into production. The most critical change identified in CR:C version 1.1.0 is the addition of new CR:C error codes and modifications to Reject Response creation to allow school systems to clearly recognize how to react.

ESC voting members agreed with the Testing and Certification Advisory Team (TCAT) recommendation to post the CR:C controlled test documentation to the NCHELP website for public use. The CR:C Testing Tool instance documents will be updated during the January 2006 meeting in Clearwater, Florida. Since the testing team utilized live SSN ranges and demographic data during the test, TCAT recommends posting of the beta test documents with modifications to the non-public personal information. Then individual organizations can modify test documents to meet their own individual testing needs. TCAT will ensure that all documents are totally accurate based on CR:C version 1.1.0.

## **GAMAT Team Update**

*Rob Boisen, Great Lakes  
Michelle Fosnot, Sallie Mae*

In the last quarter the General Account Maintenance Team submitted a proposal to modify CAM to convey E-Signature Custodian information. There is currently no industry standard in place that allows organizations to trade E-Signature Custodian information outside of CommonLine. Adoption of this proposal would create such a standard.

This proposal has recently been approved by the ESC membership. FFEL industry participants that support CAM have agreed that they will support E-Signature Custodian information as 'R1' required fields in the transmission and response of CAM information on or before 7/1/2007.

The R1 designation means that that the data should be provided if available. The creator of the CAM submittal record should populate these fields if they have the information. The recipient of the E-Signature information would be required to report the information in subsequent CAM transmissions.

E-Signature Custodian information will be added to the following CAM Records:

- Record Type 16 Lender/Lender-Servicer Change. This allows the information to be shared when a lender or lender-servicer transfer is performed.
- Record Type 17 Consolidation Loan Notification. This allows the information to be shared when a new consolidation loan is reported.
- Record Type 26 Principal and Accrued Interest Balance. This allows the information to be shared as part of routine reporting activity.

***(Continued on next page)***

### **GAMAT Team Update (continued)**

- Record Type 27 Master Promissory Note Update. This allows the information to be shared when the Master Promissory Note information is updated.

Next, GAMAT will publish an addendum to the CAM specification that provides details on modifications to the CAM standard related to E-Signature Custodian.

In addition GAMAT will be working to identify and implement changes to the CAM specification required by Budget Reconciliation. Changes identified to date include the elimination of Spousal Consolidation, and potential changes related to Graduate PLUS loans. This will be a high priority for GAMAT as changes related to Grad PLUS loans are required to be implemented by July 1, 2006.

## **Testing and Certification Update**

*Jeannette Miller, Sallie Mae  
Darwin Peiffer, AES*

The Testing and Certification Advisory Team had quite a busy year in 2005. Early in the year, the team coordinated the release of Version 1.06 of the Testing Tool, which corresponded to Version 1.06 of the Implementation Guide and the Schema. Then, in conjunction with the Communications and Training Advisory Team, we developed an industry-wide standard to track CR:C testing. The process involves each organization completing a "Ready to Test" form to indicate it is ready to begin testing. The organization will then be listed on an industry-wide CR:C database. The database has separate sections for Loan Processors and School-Based Software Providers. The database will list organizations in one of three distinct

sections: one for those "Ready to Test", a second for those who have had "One or More Successful Interagency Tests", and a third for those who have "Successfully Tested with 5 Other Organizations". Organizations that complete testing with one another will each complete a "Testing Completed" form to certify the results.

Before this process was fully implemented, a decision was made to postpone readiness testing until a CR:C Beta Testing process could be completed. This Beta Testing began in July and did not conclude until November. Testing and Certification was instrumental in this process. All files created for beta testing were run through the Testing Tool. This helped to identify problem areas in how CR:C files were being created.

The Beta Testing served as a proof of concept and allowed us to identify potential problems that could expect to be encountered with CR:C implementation. It also helped to identify issues with the Testing Tool. The developer, Tim Wenger, is to be highly commended, for his quick turnaround in resolving the issues found with the tool and for getting the revised versions out to the Beta Testing community, in most cases within days.

As a result of the CR:C Beta Testing, additional changes were made by the Origination Standards Advisory Team to the Implementation Guide, resulting in Version 1.1.0. This new version was subsequently agreed to be the new standard for CR:C development. After corresponding revisions, Version 1.1.0 of the Testing Tool was made available to the industry in early December.

Looking to the future, it appears we will be just as busy in 2006. To satisfy industry requests for sample files to assist with individual organization implementations, the Team will be taking the CR:C Beta testing

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### **Testing and Certification Update (continued)**

files generated in 2005 and modifying them to create generic CR:C files that can be used by any organization in the industry in their development and testing efforts. These files will eventually be posted on the NCHELP website.

The Team will also be assisting the Origination Standards Advisory Team in updating the Instance Documents contained in the Implementation Guide to reflect the changes made to the Guide. And finally, discussions with the General Account Maintenance Advisory Team to develop a CAM Testing Tool are starting up again. The Teams are in the preliminary stages of this discussion.

Anyone interested in assisting us with our upcoming challenges, should feel free to join us on our weekly conference calls @ 2:00 EST. Please contact one of us for additional call information.

## **DACAT Team Update**

*David Fuson, NSLP  
Loretta Paganini, Citibank*

The New Year brought a change to the DACAT leadership team. Marion Baker has taken on new responsibilities within her company and resigned as co-chair. We wish her the best and are appreciative for her efforts in advancing default aversion and claim issues within CAM. David joined the leadership team when Marion was on a leave of absence and now co-chairs with Loretta.

Currently the focus of the team's efforts are on getting the CAM records updated to incorporate the changes made to the common claim form that was published January 1, 2006. Specifically, new fields were provided on the claim form for lenders to report unpaid origination fees and capitalized interest for industry compliance

to the Taxpayer Relief Act (TRA). A proposal to update the CAM records has been approved by the team and forwarded to the ESC for review and approval.

DACAT is exploring the process of exchanging borrower e-mail address information when lenders submit default aversion requests or claims. Borrower e-mail has been shown to be an effective tool to contact borrowers for default prevention and collection purposes and initial discussions have shown support for requiring this information.

Efforts are also being made to update CAM records involving issues that have been resolved since the last update in April, 2005. Additional work will begin to address changes arising from the Budget Reconciliation Act and Reauthorization.

Discussions have taken place between committee leads of DACAT and GAMAT to conduct quarterly leadership meetings to discuss topics that impact both groups. We are looking forward to the opportunity to ensure the committees are working together on issues that affect them both.

## **Communications and Training Update**

*Erin Rose, KeyBank*

The last quarter of 2005 was quite active for Communications and Training (C&T). Our efforts to spread the good word of CR:C were continued with CR:C presentations at both EAC conferences. Feedback from attendees was very positive. In addition, we have had a session accepted at NASFAA. In the last quarter updated CAM and CR:C surveys were posted to the NCHELP web page.

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### **Communications & Training (continued)**

With 2006, we must relay some unfortunate news. Due to changes in his responsibilities at NELA, Anthony Lombardi must step down as co-chair of C&T. We wish Anthony the best of luck in his new role and thank him for his contribution.

With this change, ESC has decided to make some structural changes within the group.

The Secretary role (currently held by Lisa Oldre) will be eliminated. The duties formerly performed by the Secretary will be rolled under C&T (including the recording and distributing of meeting minutes) and Lisa Oldre will become the new co-chair of C&T. Welcome Lisa!

In the coming year, we will continue to make efforts to get on conference agendas, speaking not only on CR:C, but other ESC topics – so keep an eye out!

## **EAC Conference Update**

*Mike Balogh, NCHelp*

There were two announcements by the Department of Education's at the most recent Electronic Access Conferences that provide relief to schools in their determination of borrower eligibility responsibilities:

- Effective immediately, in addition to paper documentation, institutions can rely upon information it accesses directly from a loan holder's database as documentation that a loan reported by or on NSLDS as being in default is no longer in default or otherwise no longer impacts a borrower's eligibility (e.g. 'satisfactory arrangements have been made). Access to loan data directly from a loan holder's database includes the use of web-based products that display a loan holder's real-time data.

Web-based products must obtain data directly from a guarantor, lender or servicers' system and be displayed without any modification. Institutions must be able to verify that the loan being reviewed is the problematic loan. The institution must print and retain an image of the information it obtained from the web that clearly identifies the borrower, the status of the debt, and the source of the data. It is anticipated that the Department will be issuing written guidance providing additional information on this issue.

- It was also announced that beginning with the 2006-2007 award year, schools are no longer required to research unallocated dollars to determine their affect on a student's aggregate loan eligibility. This was recently confirmed in the December 2, 2005 publication of ISIR instructions, as well as additional written information on this change.

Thanks to the collaborative efforts of the NCHelp Electronic Standards Committee School Advisory Group (co-chaired by Linda Katrinic of Baker College and Carrie Steere-Salazar of the University of California, San Francisco) and FSA for their work on this effort. Members of the School Advisory Group are especially pleased by this announcement as it will provide them with the ability to more efficiently counsel and provide aid to their students.

## **Budget Reconciliation**

*Mark Putman, NCHelp*

On February 1, the U.S. House of Representatives approved by the narrowest of margins (216-214), S. 1932, the *Deficit Reduction Act of 2005*. It was signed by the President and enacted on February 8, 2006.

Among the provisions in the bill is the authorization of PLUS loans to graduate  
**(Continued on next page)**

and professional students. This provision has an effective date of July 1, 2006. The rest of the provisions in Section 8005 of the bill regarding loan limits take effect July 1, 2007.

Over the next two months, the Electronic Standards Committee plans a focused effort on identifying the changes required in the

current versions of CommonLine and CAM necessary to implement the new eligibility.

There will also be an additional two-day meeting in March for a sub-group of ESC members to revise the affected documentation. Information on the meeting will be sent to the ESC listserv as soon as dates and location are finalized.

## ESC MEETING SCHEDULE FOR 2006

(PLEASE NOTE 2006 DATES/LOCATIONS ARE SUBJECT TO CHANGE BASED ON HOTEL AVAILABILITY AND RATE)

Date	Location	Hotel	Rate (+ Tax)	Deadline	Group
Jan 23-25, 2006	Clearwater	Belleview Biltmore	\$159	12/28/2005	Electronic Standards Committee / PESC
March 6-7, 2006 or March 13-14, 2006	TBD	TBD	TBD	TBD	ESC Sub-Committee on Grad PLUS Implementation
April 24-26, 2006	St Louis	Millennium Hotel	\$129	4/09/2006	Electronic Standards Committee
July 24-26, 2006	Denver	Marriott City Center	\$155	7/3/2006	Electronic Standards Committee
Oct 16-18, 2006	Charlotte	Omni Charlotte	TBD	TBD	Electronic Standards Committee

*There are opportunities to sponsor the April and October ESC meetings. Please contact Mark Putman at the NCHELP office. [mputman@nchelp.org](mailto:mputman@nchelp.org) or 913-724-6655 direct*

## Mark your calendar!

### 3rd Annual Conference on Technology & Standards

Dates: 5/1/2006 - 5/3/2006

Location: Washington, DC

**We welcome your feedback! What would you like to see in a future issue? Any suggestions or issues with existing articles, please contact Erin Rose at:**

**[erin\\_rose@keybank.com](mailto:erin_rose@keybank.com)**

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## **SunGard SCT and University System of Georgia Adopt PESC XML Transcript Standard for Higher Education**

### **XML Format Enables Automated Electronic Data Transfer, Helps Make Academic Transcript Exchange Easier Within and Among Institutions**

MALVERN, PA, February 16, 2006 — SunGard SCT and the University System of Georgia have collaborated to adopt the Postsecondary Electronic Standards Council (PESC) eXtensible Mark-up Language (XML) transcript standard for higher education. SunGard SCT, a part of SunGard Higher Education Solutions ([www.sungardhe.com](http://www.sungardhe.com)), is one of the first higher education solutions providers to enhance a student administrative system with the new standard.

"The collaboration between SunGard SCT and the University System of Georgia is an example of the active involvement required to make standards viable in higher education," said Michael Sessa, PESC executive director. "SunGard SCT has been a contributor to the development and adoption of standards in higher education for many years. The adoption and implementation of this particular standard will help with more efficiency, less cost, and better data integrity for higher education."

SunGard SCT adopted the PESC postsecondary XML transcript standard and modified the existing process of the SCT Banner student administrative system to allow requests for and receipt of student transcripts using the new PESC XML schema. Native support for the new standard in SCT Banner will help automate the fast, efficient, and accurate exchange of academic transcript information within and among postsecondary institutions.

"Electronic transfer of data has proven to be cost effective and efficient," said Tonya R. Lam, associate vice chancellor for Student Affairs, Board of Regents of the University System of Georgia. "The new XML transcript standard elevates these efficiencies and gives us more flexibility than before."

About 500 institutions currently send and receive academic transcripts in the Electronic Data Interchange (EDI) format via a dedicated server at the University of Texas at Austin. The new XML Postsecondary Transcript format will also be supported, allowing SCT Banner customers to exchange transcripts directly with other institutions or via the centralized exchange location using whichever format they prefer.

MORE

"SunGard SCT is committed to the development and adoption of industry standards that help improve institutional performance and contribute to the success of the greater higher education community," said Jack Kramer, senior vice president, solutions architecture and enterprise applications, SunGard SCT, and a member of PESC's board of directors. "Incorporating standards into our solutions is one way we help customers to incorporate a wide array of solutions into their digital campuses."

For more information on PESC or the XML Postsecondary Transcript, please visit [www.PESC.org](http://www.PESC.org).

#### **About SunGard Higher Education Solutions**

SunGard Higher Education (comprised of SunGard BSR, SunGard Collegis, and SunGard SCT) provides professional services, managed services, and software solutions to help colleges and universities build, unify, and manage their digital campuses. Bringing together people, processes, and technology, SunGard Higher Education assists more than 1,600 customers worldwide to strengthen institutional performance through improved constituent services, increased accountability, and better educational experiences. [www.sungardhe.com](http://www.sungardhe.com)

#### **About SunGard**

With annual revenue of \$4 billion, SunGard is a global leader in software and processing solutions for financial services, higher education and the public sector. SunGard also helps information-dependent enterprises of all types to ensure the continuity of their business. SunGard serves more than 25,000 customers in more than 50 countries, including the world's 50 largest financial services companies. Visit SunGard at [www.sungard.com](http://www.sungard.com).

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END



FOR IMMEDIATE RELEASE

Contact: Michael Sessa  
PESC Executive Director  
202-293-7383

## ***Data Transport Workgroup Proposes Specification for Education Community Standard*** *Public Comment Period Now Open*

February 17, 2006 (Washington DC) ~ The Postsecondary Electronic Standards Council (PESC) is pleased to announce that the Data Transport Workgroup of the Standards Forum for Education has proposed its Data Transport Specification as an approved and recognized education community standard.

"I have been involved with PESC the last several years as it developed standard naming conventions (Registry and Repository) and formats (Schemas) for information shared in the higher education community," states Kim Shiflette, Product Manager at USA Funds, a founding PESC member; and Chair of the Data Transport Workgroup. "The Data Transport Standard provides the next logical step of standard-setting within PESC – a standard to "move" any information from one place to another in an immediate and secure manner with guaranteed delivery," Ms. Shiflette continues.

Together, the National Council of Higher Education Loan Program's (NCHELP) Electronic Standards Committee (ESC), PESC's Standards Forum for Education, the Office of Federal Student Aid of the U.S. Department of Education, and the American Association of Collegiate Registrar and Admissions Officer's (AACRAO) Standardization of Postsecondary Education Electronic Data Exchange (SPEEDE) Committee, and the entire education community have worked closely over the past few years to develop an objective, sound process for approving standards (see <http://www.PESC.org/info/Policies-Procedures.asp>.) With the development work completed and submitted on February 6, 2006, the Data Transport Specification is now immediately ready for public comment period. The complete submission can be accessed at <http://www.PESC.org/Workgroups/DataTransport/>. The public comment period begins Friday February 17, 2006 and will be thirty (30) calendar days. Public comment period expires at the close of business on Monday March 20, 2006. All comments, from the PESC Membership and the public, shall be made in the form of an e-mail to the PESC Executive Director at: [Sessa@PESC.org](mailto:Sessa@PESC.org). The comment e-mail should clearly identify the:

- 1) Responder name and appropriate contact information;

- 2) Source of the comments, i.e., whether the comments are individual or represent those of a group the responder represents;
- 3) Nature of the responder's interest in the standard (what is the issue and why is it important?);
- 4) Element(s) of the proposed standard with which issue is taken;
- 5) Changes suggested to resolve the issue(s).

The Submission Letter, Business Case and History Letter, PESC Response Letter, and Specification are all posted to the PESC website and [www.PESC.org/Workgroups/DataTransport/](http://www.PESC.org/Workgroups/DataTransport/).

### **The Process**

Within 30 calendar days after the close of the public comment period, the Change Control Board (CCB) of the Standards Forum for Education will address and consider all public comments and make, in consultation with the Data Transport Workgroup any necessary revisions. All public comments will be posted to the PESC website during the review process. The CCB's consideration/revision period expires on April 19, 2006 unless extenuating circumstances exist which require further deliberation.

Once any changes resulting from the public comment period have been incorporated, the CCB will recommend to the Standards Forum's Steering Committee and the PESC Board of Directors that the Specification be submitted to a vote by the PESC Members. The Board will have seven (7) calendar days to approve the submission or refer it back to the CCB with specific instructions for further work. The PESC office will issue electronic ballots to the official contacts of voting Member organizations.

Completed ballots, including the reason(s) for any rejection, shall be returned to the PESC office via e-mail attachment, fax, overnight delivery, or U.S. Postal Service within ten (10) business days. PESC staff is responsible for the tabulation of the ballots; acceptance of the Specification as a standard requires an affirmative vote of at least 80% of all votes cast. Once the Members accept the Specification, the Board of Directors will within seven (7) calendar days ratify the vote, publish/post all necessary documents and communications, and implement version control on all documents. Approved standards are freely accessible on the PESC website ([www.PESC.org](http://www.PESC.org)).

For more information, please visit [www.PESC.org](http://www.PESC.org).

### **About PESC**

*Established in 1997 and located in Washington, D.C., the Postsecondary Electronic Standards Council (PESC) is a non-profit, community-based, umbrella association of colleges and universities; professional and commercial organizations; data, software and service providers; and state and federal government agencies. PESC's mission is to lead the establishment and adoption of data exchange standards in education. The goals of the mission are to enable the improvement of institutional performance and foster collaboration across educational communities in order to lower costs, improve service, and attain system interoperability.*



FOR IMMEDIATE RELEASE

Contact: Michael Sessa  
PESC Executive Director  
202-293-7383

## ***High School Transcript Workgroup Proposes XML Standard as Education Community Standard Public Comment Period Now Open***

February 22, 2006 (*Washington DC*) ~ The Postsecondary Electronic Standards Council (PESC) is pleased to announce that the High School Transcript Workgroup of the Standards Forum for Education has proposed its High School XML Transcript as an approved and recognized education community standard.

"I'm excited about posting this proposed national standard for the XML High School Transcript. It is the result of over a year's worth of weekly conference calls and three face-to-face meetings of the workgroup that developed this schema," states John T. "Tom" Stewart, Member of AACRAO's SPEEDE Committee; Retired College Registrar from Miami Dade College in Florida; and Co-Chair of the High School Transcript Workgroup .

"I am very pleased that a process of community-wide collaboration has created an open standard for exchange of High School academic achievement records," says Bruce Marton, Associate Director of SIS at the University of Texas at Austin; Member of AACRAO's SPEEDE Committee; and Co-Chair of the High School Transcript Workgroup. "A collaboration of High Schools, Colleges, State Education Agencies and Information System Providers has produced a standard that provides for national interoperability and best practices while preserving local flexibility and control."

The workgroup is comprised of a wide range of representatives from state agencies (including California, Georgia, North Carolina, Oklahoma), college and university admissions officers and registrars, and high school counselors and registrars. It allows the sending of a high school's data for a student that postsecondary schools need to make timely and appropriate admissions decisions, as well as being able to provide important data to state agencies.

Together, the National Council of Higher Education Loan Program's (NCHELP) Electronic Standards Committee (ESC), PESC's Standards Forum for Education, the Office of Federal Student Aid of the U.S. Department of Education, and the American Association of Collegiate

Registrar and Admissions Officer's (AACRAO) Standardization of Postsecondary Education Electronic Data Exchange (SPEEDE) Committee, and the entire education community have worked closely over the past few years to develop an objective, sound process for approving standards (see <http://www.PESC.org/info/Policies-Procedures.asp>.)

With the development work completed and submitted on January 23, 2006, the High School XML Transcript is now immediately ready for public comment period. The complete submission can be accessed at <http://www.PESC.org/Workgroups/HSTranscript/>. The public comment period begins Thursday February 23, 2006 and will be thirty (30) calendar days. Public comment period expires at the close of business on Monday March 27, 2006. All comments, from the PESC Membership and the public, shall be made in the form of an e-mail to the PESC Executive Director at: [Sessa@PESC.org](mailto:Sessa@PESC.org). The comment e-mail should clearly identify the:

- 1) Responder name and appropriate contact information;
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- 5) Changes suggested to resolve the issue(s).

The Submission Letter, Business Case and History Letter, PESC Response Letter, implementation guide, and XML Schema are all posted to the PESC website at [www.PESC.org/Workgroups/HSTranscript/](http://www.PESC.org/Workgroups/HSTranscript/).

### **The Process**

Within 30 calendar days after the close of the public comment period, the Change Control Board (CCB) of the Standards Forum for Education will address and consider all public comments and make, in consultation with the High School Transcript Workgroup any necessary revisions. All public comments will be posted to the PESC website during the review process. The CCB's consideration/revision period expires on April 26, 2006 unless extenuating circumstances exist which require further deliberation.

Once any changes resulting from the public comment period have been incorporated, the CCB will recommend to the Standards Forum's Steering Committee and the PESC Board of Directors that the Specification be submitted to a vote by the PESC Members. The Board will have seven (7) calendar days to approve the submission or refer it back to the CCB with specific instructions for further work. The PESC office will issue electronic ballots to the official contacts of voting Member organizations.

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