



# Volume 4 Campus-Based Processing Technical Reference

COMMON ORIGINATION AND DISBURSEMENT

2024 – 2025 Technical Reference

Federal Student **Aid**  
AN OFFICE OF THE U.S. DEPARTMENT OF EDUCATION

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# Section 1

## **Overview of Changes to Campus-Based Processing for 2023**

This section provides an overview of the changes made for 2024-2025 for Campus-Based Processing on the Common Origination and Disbursement (COD) System.

## Campus-Based (CB) Changes

### CHANGES FROM 2023-2024 TO 2024-2025

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

**NOTE:** The FSEOG Program updates as part of this Campus-Based (CB) Common Record Schema are for future use.

#### Additions to Campus-Based (CB)

Description	FWS	FSEOG
Suffix	X	X
SSN (to Person Identifiers Block))	X	X
Birth	X	X
Birth Date (to Birth Block)	X	X
Rejecting Edit 011	X	X
Rejecting Edit 012	X	X

#### Modifications to Campus-Based (CB)r

Description	FWS	FSEOG
First Name	X	X
Middle Initial	X	X
Postal Code	X	X
Phone Number	X	X
CPS	X	X

Calendar Year (to the Response Financial Summary)	X	X
Rejecting Edit 020	X	X
Rejecting Edit 021	X	X
Rejecting Edit 024	X	X
Rejecting Edit 996	X	X
Rejecting Edit 998	X	X

## ADDITIONS TO CAMPUS-BASED PROCESSING FOR 2024-2025

### SUFFIX

A new optional name Suffix field will be added. The Suffix field will allow for a minimum of 0 characters and a maximum of 10 characters. Valid values include: Letters (uppercase 'A-Z' and lowercase 'a-z'); Spaces, blanks; . (period); - (hyphen); ' (apostrophe); Numbers (0-9). A nine-digit string of numbers will not be accepted

### SSN (TO PERSON IDENTIFIERS BLOCK)

A new optional SSN field will be added to the Person Identifiers block. The SSN field will allow for a minimum of 9 characters and a maximum of 9 characters. Valid values include: Numbers (0-9).

### BIRTH

A new Birth block will be added. The Birth block will contain a new Birth Date field. This is a complex element and has no valid values.

**NOTE:** Please see the [Schema Version 1.0b CB Common Record Layout](#) for more information.

### BIRTH DATE (TO BIRTH BLOCK)

A new optional Birth Date field will be added to the Birth Block. The Birth Date field will allow for a minimum of 10 characters and a maximum of 10 characters. Valid values include: Numbers (0-9); The format is CCYY-MM-DD.

### REJECTING EDIT 11

A new Rejecting Edit 11 will be added at the Student Level for all Campus-Based programs when a NEW Award is being submitted for a NEW Student and the value in either the SSN Change Tag or Birth Date Change Tag is not found in the COD System.

## REJECTING EDIT 12

A new Rejecting Edit 12 will be added at the Student Level for all Campus-Based programs when an update to an EXISTING Award is being submitted for an EXISTING Student and the value in either the SSN Change Tag or Birth Date Change Tag is not found in the COD System.

## MODIFICATIONS TO CAMPUS-BASED PROCESSING FOR 2024-2025

### FIRST NAME

The First Name field will be modified to allow for a maximum of 35 characters.

### MIDDLE INITIAL

The Middle Initial field will be redefined as Middle Name and allow for a maximum of 35 characters.

### POSTAL CODE

The Postal Code field will be modified to allow for a maximum of 10 characters.

### PHONE NUMBER

The Phone Number field will be modified to allow for a maximum of 15 characters.

### CPS

The Central Processing System (CPS) will be replaced with the FAFSA Processing System (FPS) for Calendar Year 2023 and forward.

## EDITS MODIFIED FOR 2024-2025

### REJECTING EDIT 24

Existing Edit 24 will be modified to replace CPS with FPS for Calendar Year 2023 and forward.

### REJECTING EDIT 998

Existing Edit 998 will be modified to trigger on the new Suffix field when the content submitted did not conform to the valid format according to COD Business Rules.

# Section 2

## **Implementation Guide for Campus-Based Processing:**

This chapter assists Schools, EDEExpress Users, Third-Party Servicers, and Software Providers with implementing the student reporting for the FWS Program for the 2023 Calendar Year. It serves as a companion to the CB Common Record Layout, Edit Codes, and School Testing Guide contained in this Technical Reference. This document and the XML CB Common Record Schema v1.0b are available at Knowledge Center Home.

Note: The FSEOG Program updates as part of this Campus-Based (CB) Common Record Schema are for future use.

## Campus-Based Common Record Valid Format Rules

### CAMPUS-BASED COMMON RECORD XML SCHEMA GUIDELINES

The CB Common Record XML Schema guidelines reflect accepted industry practices.

#### BUSINESS RULES

1. The CB Common Record XML Schema contains the validation rules for the CB Common Record document that is transmitted to COD.
2. XML Schema version information is reflected in the Namespace attribute xmlns and its value in the root element of the Common Record document. (e.g. `<xsd:schema targetNamespace="http://www.ed.gov/FSA/COD/CAMPUS_BASED/2024/v1.0b" xmlns:xsd="http://www.w3.org/2001/XMLSchema" xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" xmlns:campusbased="http://www.ed.gov/FSA/COD/CAMPUS_BASED/2024/v1.0b" elementFormDefault="qualified">  
<xsd:element name="CBCommonRecord" type="campusbased:CBRecordType">`)
3. The Namespace attribute and its value are required on submissions and are echoed back in the response file.
4. The XML Schema and the namespace attribute can be used throughout the development and testing of a system to validate the system's XML document output.
5. XML Schema validation is performed prior to business rule processing. If the incoming batch fails XML validation, the student and award information contained within the batch will not be processed by COD.
6. The COD System returns an error response file containing Edit 210 on the <DocumentID> tag, indicating that the record failed schema validation if the incoming CB Common Record fails schema validation. These files will contain the same structure as a batch level reject response file and will contain the edit 210.
7. All records submitted in the 1.0a and 1.0b Schema must pass full schema validation.

## EDEExpress for Windows 2024-2025

EDEExpress for Windows 2023-2024 communicates to COD using the CB Common Record in XML for FWS awards (FSEOG awards will be For Future Use). The External Import Add and Change files used by EDEExpress 2024-2025, Release 2.0 to interface with Combination and Mainframe Systems are offered in fixed-length format and not XML for 2023-2024. External Export files used by EDEExpress to interface with



Combination and Mainframe Systems continue to be offered in multiple formats, including fixed length, as well as multiple delimited options: comma, tab, user-defined character.

## **BUSINESS RULES**

1. EDEExpress for Windows 2024-2025, Release 3.0 will contain functionality for import and export of the XML CB Common Record from and to COD.
2. EDEExpress Users should refer to the sections within Volume 3 – Common System Technical Reference of this technical reference as their reference tool.
3. The Campus-Based External Import Add and Change files used by EDEExpress 2024-2025, Release 3.0 to interface with Combination and Mainframe Systems are offered in fixed-length format.

# Campus-Based Common Record XML Schema

All tag names in the CB Common Record XML schema v1.0b reflect standards and recommendations from the Post-Secondary Electronic Standards Council. The CB Common Record XML schema 1.0b latest release is available at [Campus-Based XML Schema | Library | Knowledge Center](#)

## BUSINESS RULES

Please see the CB Common Record Schema Guidelines topic for more information about editing against the Namespace attribute.

1. All CB Common Record document submissions for the 2023 Calendar Year and forward must conform to Common Record XML schema version 1.0b.
2. All CB Common Record document submissions for previous Calendar Years must conform to the Campus-Based Common Record XML schema version 1.0b, or previous schema version 1.0a.
3. System-generated documents for all Calendar/Award Years are sent in the XML schema version, 1.0b. Web responses are also sent out in this schema version.
4. All Responses are returned in the same CB Common Record XML schema version as the submitted CB Common Record document.
5. The COD System uses the Document Information Block Common Record root element `<CBCommonRecord xmlns:campusbased="http://www.ed.gov/FSA/COD/CAMPUS_BASED/2024/v1.0b">` as an indicator of the XML schema version to which the CB Common Record document conforms. The COD System processes the CB Common Record Document using the XML schema version indicated by this tag.

## MAXIMUM LENGTH VALUES AND LEADING ZEROES

XML does not require that the data for a specific tag occupy the maximum length. However, the data cannot exceed the maximum length specified for a tag or the batch cannot be processed. Refer to the CB Common Record Layout topic in Section 2 of this Volume – Campus-Based Common Record Layout for “max length” valid field lengths.

The following tags will have the leading zeroes removed from the System Generated Response files:

- Total Count
- Total Count Accepted
- Total Count Rejected
- Total Count Duplicated
- Total Reported Funds
- Total FWS Earnings
- FPS Transaction Number

## BUSINESS RULES

1. Do not include leading zeroes and spaces to satisfy the maximum length for a given tag.

### EXAMPLE 1

In the example below, the student's first name, John, is four characters long. Although the first name tag has a maximum length of 35 characters, leading zeroes or spaces are not necessary to occupy the maximum length of the tag.

```
<FirstName>JOHN</FirstName>
```

### EXAMPLE 2

In the example below, the Total FWS Earnings is 400. Although the Award amount tag has a valid value up to 999999999, leading zeroes or spaces are not necessary to occupy the length of the tag.

```
<TotalFWSEarnings>400</TotalFWSEarnings>
```

## EMPTY (BLANK) AND NULL TAGS

The COD System differentiates between a tag being empty (blank) and a tag being null in the database.

### BUSINESS RULES

1. An empty tag is one in which content of the tag equals blank or spaces.
2. An empty tag is reported as:  

```
<PhoneNumber></PhoneNumber>
```

  
or  

```
<PhoneNumber/>
```
3. Tags not necessary or not applicable for the document submission should be omitted, rather than reported as empty. Please see examples 1, 2.
4. Tags that are defined as enumerated lists and can contain blank as a valid value have `<xsd:enumeration value=" " />` defined for them in the XML CB Common Record Schema.
5. If a school reports blank for a tag defined as an enumerated list that does NOT have blank as a valid value defined in the XML CB Common Record Schema, the file will fail XML validation and will not be processed by the COD System.
6. If a school reports a blank value for a tag that does have blank as a valid value defined in the XML CB Common Record Schema, blank will override the data in the COD database.
7. A null tag is used to remove or delete content currently on the COD database.
8. A null tag (`nil="true"`) is reported as:  

```
<PhoneNumber xsi:nil="true"/>
```
9. Tags that can contain null values have a `nil="true"` attribute set for them in the XML CB Common Record Schema.
10. If a tag has a “min occurs” value greater than zero and the school has no content to report in that tag, the school must report a null tag.

## EXAMPLE 1

If a student does not have a Middle Name, the Middle Name tag should be omitted from the CB Common Record, rather than reported as empty or blank.

<Name>

<FirstName>SUE</FirstName>

<LastName>SMITH</LastName>

</Name>

## EXAMPLE 2

For FWS awards, the Award Year, <AwardYear>, is an optional field and is not necessary for submission. In these cases, this tag should not be included in the document, rather than reported as empty.

## Data Types

The CB Common Record includes the following data types:

- Date
- Date/Time
- Year
- Year/Month
- Integer
- String
- Boolean

Each of these data types is discussed in detail below.

## DATE FIELDS

All date fields on the CB Common Record use the following format: CCYY-MM-DD. Dates that are not formatted using this format and the appropriate date range values will fail XML validation.

### BUSINESS RULES

1. The dashes must be included.
2. The CC designates the Century (19-20).
3. The YY designates the Year (00-99).
4. The MM designates the Month (01-12).
5. The DD designates the Day (01-31)
6. A leap year is defined as one in which the value of YY is divisible by four (4).
7. In a leap year, the valid values for DD are “01 – 29” when MM is equal to “02”.

## DATE/TIME FIELDS

All date/time fields on the CB Common Record use the following format: CCYY-MM-DDThh:mm:ss.ff.

### BUSINESS RULES

1. The punctuation marks (dashes, colons and decimal point) must be included.
2. The CC designates the Century (19-20).
3. The YY designates the Year (00-99).
4. The MM designates the Month (01-12).

5. The DD designates the Day (01-31).
6. The T is the date/time separator.
7. The hh designates the Hour.
8. The hh must be submitted in 24-hour clock time.
9. The mm designates the Minutes.
10. The ss designates the Seconds.
11. The ff designates the hundredths of a second. This value may be zero (00).

## YEAR FIELDS

All year fields on the CB Common Record use the following format: CCYY.

### BUSINESS RULES

1. The CC designates the Century.
2. The YY designates the Year.
3. All year fields on the CB Common Record use the following format: CCYY-MM.

## YEAR/MONTH FIELDS

All Year/Month fields on the CB Common Record use the following format: CCYY-MM.

### BUSINESS RULES

1. The CC designates the Century.
2. The YY designates the Year.
3. The MM designates the Month.

## INTEGER FIELDS

Integer fields on the CB Common Record are percentage and numeric fields.

### BUSINESS RULES

1. Integer fields contain whole numbers.
2. Integer fields do not contain decimal points, dollar or percent signs.
3. Leading zeroes are not necessary to occupy the maximum length of the field.

### BUSINESS RULES FOR INTEGER FIELDS REPRESENTING DOLLAR AMOUNTS

Dollar amount fields may not include two digits to the right of a decimal point.

Dollar Amounts reported in less than whole dollars will not be accepted or stored in the COD System and if submitted the COD System will trigger Rejecting Edit 996.

Dollar amount fields may only be entered with a positive dollar amount.

The following fields on the CB Common Record are dollar amount fields:

- a. Total Reported Funds, <TotalReportedFunds>
- b. Total FWS Earnings, <TotalFWSEarnings>
- c. Total FSEOG, <TotalFSEOG>
- d. Federal Share Amount, <FederalShareAmount>
- e. Institutional Share Amount, <InstitutionalShareAmount>

#### **Pennies:**

Pennies are not processed or stored by the COD System for FWS or FSEOG Programs. All FWS and FSEOG reported amounts that include partial dollar amounts will be rejected. The COD System will only accept and store whole dollar amounts. Please refer to the Reporting Pennies in the Award Amount Data Elements topic for more information.

## EXAMPLE 1

The Total FWS Earnings is returned with a positive value in the amount field.

<TotalFWSEarnings>2000</TotalFWSEarnings>

## PERCENTAGE FIELDS

Percentage fields on the CB Common Record use the following format: 0 – 100.

### **BUSINESS RULES FOR INTEGER FIELDS REPRESENTING PERCENTAGES**

1. Leading zeroes are not necessary to occupy the maximum length of the field.
2. Percent's must be reported as whole numbers or mixed numbers without the percent sign.
3. The following field on the CB Common Record are percentage fields:
  - a. Federal Share Percentage, <FedSharePercentage>

#### **Format and Valid Values:**

Please refer to *Volume 4, Section 2 – Campus-Based Common Record Layout* for more information on valid values and formats on specific fields.

## STRING FIELDS

String fields on the CB Common Record are alphanumeric fields that can contain a variety of characters.

### **BUSINESS RULES**

1. String fields can contain all ASCII characters, except a raw unescaped opening angle bracket (<), ampersand (&), closing angle bracket (>), quotation mark ("), or apostrophe (').

## BOOLEAN FIELDS

Boolean fields on the CB Common Record are fields that have exactly two values: true or false

### BUSINESS RULES

1. Boolean fields contain a value of true or false.

## XML PREDEFINED ENTITY REFERENCES

Refer to the XML Predefined Entity References topic for more information

XML does not allow character data inside an element to contain a raw unescaped opening angle bracket (<), ampersand (&), closing angle bracket (>), quotation mark ("), or apostrophe ('). If these characters are necessary in your markup, they must be escaped using predefined entity references. An XML parser replaces the predefined entity references with actual characters.

XML predefines the following five entity references:

&lt; the less than sign (<)

&amp; the ampersand (&)

&gt; the greater than sign (>)

&quot; the straight, double quotation marks (")

&apos; the apostrophe, straight quotation mark (')



# Campus-Based Common Record Processing Rules

## DOCUMENT

An XML document is the vehicle through which data is transmitted. A CB Common Record transmission is considered to be an XML document. A CB Common Record transmission, or document, may contain multiple awards for one or multiple students. In cases where the Reporting School transmits data for multiple Attended Schools, the CB Common Record may contain student and award data for multiple schools. It can be thought of as a batch.

## DOCUMENT SUBMISSION

CB Common Record documents can be submitted to the COD System via Batch Processing or the COD Website.

## BATCH PROCESSING

EDConnect Users: The most recent version of EDconnect available is v8.6.0.

All documents submitted via batch processing must be submitted via the Electronic Data Exchange over the Student Aid Internet Gateway (SAIG). For further information, please refer to the SAIG Host Communication Guide located at <https://fsapartners.ed.gov/knowledge-center/topics/software-and-other-tools>.

## BUSINESS RULES

1. All documents submitted via batch processing must be submitted via the Student Aid Internet Gateway (SAIG).
2. Each transmission must have an SAIG transmission batch header (O\*N05) and trailer (O\*N95) record.
3. Each transmission can include the SAIG transmission header (O\*N01) and trailer (O\*N99) record. Inclusion of the SAIG transmission header (O\*N01) and trailer (O\*N99) record is optional and is not required for COD processing.
4. Only one set of CB Common Record begin and end tags can be submitted within each SAIG transmission batch header (O\*N05) and trailer (O\*N95) pair.
5. If more than one set of CB Common Record begin and end tags is submitted within SAIG transmission batch header (O\*N05) and trailer (O\*N95) pair, COD rejects the document with error code 105.
6. Multiple pairs of SAIG transmission batch headers (O\*N05) and trailers (O\*N95) can be submitted within the SAIG transmission headers (O\*N01) and trailers (O\*N99). Please see example below.
7. The variable length Batch Number field on the SAIG Transmission batch header (O\*N05) and trailer (O\*N95) occupies positions 42-91.
  - a. Positions 42-61 are reserved for school use.
  - b. Positions 62-91 are reserved for Department of Education use.

- c. COD populates positions 62-91 with the 30-character CB Common Record Document ID on all response records. If the school populates any data in positions 62-91 on the incoming record, COD will overwrite this data with the Document ID on the response record.

## COD MESSAGE CLASSES

For information on the Campus-Based message classes, please refer to Volume 4, Section 3 – Campus-Based Common Record Message Classes in this technical reference.

## LOGICAL RECORD LENGTH LIMITATION

For information and recommended solutions concerning the 32-kilobyte file length limitation on mainframe systems and the 9,999 byte limitation on the COD System, refer to the CB Common Record Physical Record Layout topic within this Volume 4, Section 2 – CB Common Record Layout in this technical reference.

## RESPONSE DOCUMENTS

For all CB Common Records received and processed by the COD System, the COD System returns a Response document indicating the status of CB Common Record processing, including any rejected data elements and reason(s) for the rejection(s).

### BUSINESS RULES

1. The COD System sends one Response document for each CB Common Record document processed by the COD System.
2. A Response complex element is generated for each major complex element reported on a CB Common Record document: Document, Reporting School, Attended School, Student, and Award.
3. All Response complex elements are nested within the Response document.
4. Schools have an option to receive a Full or Standard Response to CB Common Records processed by the COD System.
  - a. A Full Response contains all the original tags sent by the School, the rejected data elements and reason codes, and additional calculations performed by COD during processing.
  - b. A Standard Response contains minimum-level details of the submitted batch, and the rejected data elements and reason codes and calculations performed by COD during processing.
  - c. This option defaults to a Standard Response.
5. Schools can override this option on a record-by-record basis by submitting the <FullResponseCode> tag on the CB Common Record.
  - a. If the <FullResponseCode> tag is not sent, the option defaults to Standard Response.
6. For CB Common Records transmitted via SAIG, the COD System sends Response Documents to the school's SAIG mailbox.

7. For CB Common Records transmitted via the web, schools have an option to receive a response either via the web only, or via the web and their SAIG mailbox.
  - a. Unless the school changes the web activity response option on the [COD Website's School Options Page](#), the school will receive a response via the web only.
  - b. A response via the web will only indicate whether the record was accepted or rejected and will not contain submitted data elements.
  - c. Schools that do not wish to receive a response via the web must change this option for each program.
  - d. Schools that chose to receive a response for web activity via their SAIG mailbox will receive a Full Response.

If the school sends the CB Common Record via	The school will receive a response via
SAIG Mailbox	SAIG Mailbox
COD Website	COD Website only or COD Website and SAIG Mailbox

Table 1

## EXAMPLE

The following diagram illustrates how a Response complex element is generated for every complex element of data submitted on the CB Common Record and the nesting of those complex elements within the Response Document:

```

Common Record
  Reporting School
    Attended School
      Student
        Award
          Award Response
            Student Response
              Attended School Response
                Reporting School Response
                  Common Record Response
  
```

## RESPONSE CODE

For each Response complex element returned, the COD System generates a Response Code that indicates whether the complex element was accepted or rejected. The Response complex element and Response Code is returned for each major complex element: Reporting School, Attended School, Person and Award.

### BUSINESS RULES

1. The COD System returns a Response complex element with a Response Code of A (Accepted) or R (Rejected).
2. A Response complex element with a Response Code of A (Accepted) is returned to indicate that the complex element was accepted.

3. A Response complex element with a Response Code of A (Accepted) does not exclude another complex element in the hierarchy from being accepted or rejected.
  - a. If a Person complex element is Accepted, this does not exclude the possibility that the Award complex element may be accepted or rejected.
  - b. If an Award complex element is Accepted, this does not exclude the possibility that the Person complex element may be accepted or rejected. Response complex element with a Response Code of R (Rejected) is returned to indicate that the data elements in the complex element are rejected.
4. A Response complex element with a Response Code of R (Rejected) is returned with at least one reject edit.
5. A Response complex element with a Response Code of R (Rejected) can result in other complex elements being rejected.
  - a. On the initial submission of the Document, a Response Code of R (Rejected) is returned if the CB Common Record document does not meet the rules of the XML CB Common Record Schema.
  - b. On the initial submission of a Person, if a Person complex element is rejected, then the Award complex element is rejected, even if all data in the Award complex element passed the edits, because the COD System cannot accept an Award complex element without an established Person.
  - c. On the initial submission of a Person, if all Award complex elements in the submission are rejected, then the Person complex element is rejected, because the COD System cannot accept a Person complex element without at least one established Award.

### EXAMPLE:

Complex Element	Processed with Edits	Response Code
Person	No	A (Accepted)
Award (1)	No	A (Accepted)

Table 2

Complex Element	Processed With Edits	Response Code
Person	No	R (Rejected) Because no Awards were accepted
Award (1)	Yes	R (Rejected)

Table 3

Complex Element	Processed With Edits	Response Code
Person	No	A (Accepted) Because at least one Award was accepted
Award (1)	No	A (Accepted)
Award (2)	Yes	R (Rejected)

Table 4

## STORING OF REJECT RECORDS

The COD System does not store records that have rejected at the Document (Batch) and Entity level including XML validation failures. The COD System does store Document and Entity data from records that have been rejected at the Person or Award level. Records that have rejected at the Person, and Award levels can be viewed on the [COD Website](#).

### BUSINESS RULES

1. Schools may view their rejected records on the [COD Website](#).
2. Rejected records are not included in any COD Reports.

## DOCUMENT VALIDATION

If a document does not validate against the XML CB Common Record Schema, the COD System does not process the document.

For more information please refer to the *Document ID Required for Document Submission*, *Sequence of Data Elements Required for Document Processing*, and *Document Submission* topics of this Technical Reference.

## BUSINESS RULES

1. The COD System contains a validation program that ensures that the CB Common Record documents are well formed and properly structured.
2. The COD System process the CB Common Record Document using the XML schema version indicated by the CB Common Record tag.
3. If tags are identified that are not specific to the XML schema version used for processing, the document is considered invalid, and Customer Service is notified of the error. Customer Service works with the school to avoid future processing problems.
4. The COD System does not process a document if:
  - a. The Document ID is missing or incomplete, or
  - b. The document structure does not meet the rules of the XML CB Common Record Schema, or
  - c. More than one CB Common Record document is inserted between an SAIG Transmission Batch Header (O\*N05) and Trailer (O\*N95) pair.
5. When a CB Common Record is submitted with a missing or incomplete Document ID, the COD System cannot return a response to the sender.
6. When a CB Common Record document does not meet the rules of the XML CB Common Record Schema, the COD System will reject the submission with Edit 210 and return an error response file containing reject Edit 210. The FSA Parter and School Relations Center will also perform outreach to impacted schools. More information regarding the error response file can be found in the “Campus-Based Common Record XML Schema Guidelines” section of the Implementation Guide.
7. When more than one CB Common Record is inserted between an SAIG Transmission Batch Headers (O\*N05) and Trailer (O\*N95) pair, the COD System returns a Response with Reject Edit 210 and message.

## SEQUENCE OF DATA ELEMENTS REQUIRED FOR DOCUMENT PROCESSING

The sequence of data within the CB Common Record is dictated by the sequence of data elements presented in the XML CB Common Record Schema.

## BUSINESS RULES

1. Data elements submitted by a school must occur in the same sequence as depicted in the XML CB Common Record Schema.
2. A CB Common Record submitted with data elements out of sequence will not validate against the XML CB Common Record Schema and will therefore be rejected.

## DOCUMENT ID REQUIRED FOR DOCUMENT SUBMISSION

The COD System checks to ensure the Document ID is present and is properly formatted.

**Document ID Formatting:**

Please refer to *Volume 4, Section 2 – CB Common Record Layout* in this *Technical Reference* for proper format of the Document ID.

**BUSINESS RULES**

1. Document ID is an essential element for importing, storing and tracking the data submitted in a CB Common Record Document by a school.
2. The COD System does not process documents that do not have a Document ID.
3. The COD System does not process documents that have an incomplete Document ID.
4. The COD System does not process documents that have an invalid Document ID format.
5. The Routing ID listed in the Document ID must be the same Routing ID as the Source Routing ID.
6. The COD System is unable to store a CB Common Record document that has an invalid, incomplete, or missing Document ID.
7. The COD System cannot return a response to a sender that submits an invalid, incomplete, or missing Document ID.

## DUPLICATE DOCUMENT IDS

The COD System checks the Document ID for duplicates on the COD database.

**BUSINESS RULES**

1. Document ID is defined as the DateTime stamp and the Source Routing ID.
2. A duplicate document is defined as a document that has a Document ID identical to one already established on the COD System.
3. The COD System rejects the document if the Document ID is a duplicate.
4. A rejected Document ID cannot be resubmitted as the COD System will recognize it as a duplicate.
5. The COD System generates a Response with Reject Edit 003 for documents with duplicate Document IDs. The Response does not contain detail data elements.

## INABILITY TO PROCESS FUTURE-DATED DOCUMENTS

The COD System confirms that the date portion of the Document's Created DateTime is not greater than the System Date.

**BUSINESS RULES**

1. If the date portion of the Document's Created DateTime is greater than the System Date, the COD System rejects the document with Reject Edit 006.
2. The COD System generates a Response for future-dated documents.

Example: The current COD System Date (July 4, 2024), Award Submission (July 5, 2024), resolve the Rejecting Edit 006 by updating Award Submission Created Date Time to July 4, 2024.

## DOCUMENTS SUBMITTED MUST CONTAIN AT LEAST ONE DETAILED RECORD

A detailed record consists of at least one Student Identifier and one Award. A Student Identifier consists of the student tag and three attributes: Social Security Number, Date of Birth, and Last Name.

### Additional Information:

For more information, please refer to the *Student Identifier* topic. For more information on the Award, please refer to the *Minimum Data Elements Required for Document Processing* topic.

### BUSINESS RULES

1. The COD System rejects the document if it does not contain at least one detailed record.
  - a. A detailed record on a New record is defined as at least one Student Identifier (Social Security Number, Date of Birth and Last Name) and one Award tag.
  - b. A detailed record on an Update record is defined as at least one Student Identifier (Social Security Number, Date of Birth and Last Name) and one Award tag.
2. The COD System generates a Response with Reject Edit 007 for documents with no detailed records.

## DOCUMENT SUBMISSIONS OF ONE DETAILED RECORD

The COD System is designed to process a large number of detailed records at one time when submitted together in a CB Common Record document. Standard school practice when submitting records is to submit a large quantity of records at once in one document. The design of the COD System incorporates this common school practice with its batch processing functionality.

### BUSINESS RULES

1. The COD System will accept and process single detailed record documents, but the system is not designed to regularly process multiple CB Common Record document submissions of one record each.
2. Processing time increases with submission of multiple documents of one detailed record each.
  - a. The time it takes the COD System to process a CB Common Record document is affected by the amount of time it takes to process the individual components of the document:
    - The SAIG batch header and trailer
    - The records contained within the document
  - b. The time it takes the COD System to process each record within a CB Common Record document is minimal in comparison to the time it takes the COD System to process the batch header and trailer.
  - c. The processing time for the batch header and trailer does not vary with document size. The batch header and trailer will be processed in the same amount of time by the COD System for a document containing one detailed record as for a document containing 50 records.



- d. Processing time for multiple records submitted in individual documents will take significantly more time than it takes to process the same number of records submitted together in one CB Common Record document. For example, it will take much longer for the COD System to process 50 documents of one record each than one document containing 50 records.
3. Multiple document submissions each containing one individual record will delay processing of all schools' records submitted after the group of single record documents.
4. The COD System will NOT reject document submissions containing only one record.
5. Document submissions containing only one record should be submitted on an exception basis only.
6. The [COD Website](#) is designed to accommodate record submission on a record-by-record basis. Schools may submit multiple individual records to the COD System via the [COD Website](#) without experiencing processing delays.

## DOCUMENT SUBMISSIONS OF MULTIPLE DETAILED RECORDS

The COD System is designed to process a large number of detailed records at one time when submitted together in a CB Common Record document. Standard school practice when submitting records is to submit a large quantity of records at once in one document. The design of the COD System incorporates this common school practice with its batch processing functionality.

### BUSINESS RULES

1. The COD System will NOT reject document submissions containing multiple records.
2. Batches containing greater than 5,000 records may not be viewable via the [COD Website](#).
3. Prior to sending a batch with multiple records to COD, ensure that your system will be able to import the CB Common Record response containing multiple records.

## RESPONSE RECORDS GENERATED BASED ON WEB ACTIVITIES

This processing option determines whether the COD System sends Response Documents to the school's SAIG mailbox based on activity performed on the COD Website. This activity includes processing a new student or award or a change to any of these on the COD Website.

### BUSINESS RULES

1. The values for this option are N or Y.
2. Y signifies that the COD System will send a Response Document to the school's SAIG mailbox based on activity performed on the COD Website.
3. N signifies that the COD System will not send a Response Document to the school's SAIG mailbox based on activity performed on the COD Website.
4. The default for this option is Y.
5. Schools may update this option at any time on the COD Website.
6. If the school selects to receive a Response Document for activity performed on the COD Website, the Document Type is WB indicating a web-initiated response.

## CB COMMON RECORD RESPONSE DOCUMENT LENGTH OPTION

Schools have the option to receive Response Documents with one tag set per line or a specified maximum number of bytes per line up to 9,999 bytes.

Schools are encouraged to discuss this option with their software vendors before electing to make any changes to the default. The school's software must be prepared to accept Response of the new length.

### BUSINESS RULES

1. The default for this option is one tag set per line.
2. Schools may choose to change the default to a specified maximum number of bytes per line, up to 9,999 bytes per line.
  - a. The minimum allowed bytes per line is the length of the longest tag in the CB Common Record XML Schema.
3. Schools must contact COD School Relations to request that this option be updated.

## MINIMUM DATA ELEMENTS REQUIRED FOR DOCUMENT PROCESSING

The COD System requires certain data elements for processing each complex element of the document. Depending on the scenario, different minimum data elements may be required for document processing.

The bolded fields below are generic examples for the actual value used to replace “source.” For more information, refer to Volume 4, Section 2 – CB Common Record Layout.

### Required Elements for Document Processing:

The <SoftwareProvider> and <SoftwareVersion> tags are required upon origination and maintenance. If they are not submitted, or submitted blank, the COD System will reject the record with reject Edit 218.

### BUSINESS RULES

1. The following data elements are required for processing a new FWS Award or a change to an existing FWS Award.

```
<?xml version="1.0" encoding="UTF-8"?>
```

```
<CBCommonRecord xmlns="http://www.ed.gov/FSA/COD/CAMPUS_BASED/2024/v1.0b"
```

```
xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
```

```
xsi:schemaLocation="http://www.ed.gov/FSA/COD/CAMPUS_BASED/2024/v1.0b  
CBCommonRecord1.0b.xsd">
```

```
<TransmissionData>
```

```
<DocumentID>
```

```
<CreatedDateTime>
```

```
<Source>
```

```
<RoutingID>
```

```
<Destination>
```

```
<RoutingID>
```

```
<Software>
```

```
<SoftwareProvider>
```

```
<SoftwareVersion>
```

```
<ReportingSchool>
```

```
<RoutingID>
```

```
<SchoolFinancialSummary>
```

```
<FinancialAwardType>
```

<CalendarYear>

<AwardYear>

<TotalCount>

<TotalReportedFunds>

<TotalFWSEarnings>

<AttendedSchool>

**<RoutingID>**

<Student>

<Index>

<SSN>

<BirthDate>

<LastName>

<FWS>

<CalendarYear>

<FPSTransactionNumber>

<TotalFWSEarnings>

2. The following data elements are required for processing a new FSEOG Award or a change to an existing FSEOG Award.

For FSEOG awards, the award related fields will be for future use only.

<?xml version="1.0" encoding="UTF-8"?>

<CBCCommonRecord xmlns="http://www.ed.gov/FSA/COD/CAMPUS\_BASED/2024/v1.0b"

xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"

xsi:schemaLocation="http://www.ed.gov/FSA/COD/CAMPUS\_BASED/2024/v1.0b  
CBCCommonRecord1.0b.xsd">

<TransmissionData>

<DocumentID>

<CreatedDateTime>

<Source>

**<RoutingID>**

<Destination>

**<RoutingID>**

<Software>

<SoftwareProvider>

<SoftwareVersion>

<ReportingSchool>

**<RoutingID>**

<SchoolFinancialSummary>

<FinancialAwardType>

<AwardYear>

<TotalCount>

<TotalReportedFunds>

<TotalFSEOG>

<AttendedSchool>

**<RoutingID>**

<Student>

<Index>

<SSN>

<BirthDate>

<LastName>

<FSEOG>

<AwardYear >

<FPSTransactionNumber>

<TotalFSEOG>

**Required Tags:**

For the FWS/FSEOG Programs, COD will return edit 996 if tags are not submitted in the correct block, per the Calendar and/or Award Year.

**Student-Centric COD Database:**

The COD database is student centric. Changing the student demographic data for one award year and award type will change it for all award years and award types for that student. Please refer to the *Changing Student Identifier Information* topic for more information about submitting changes to the Student Identifier.

**Processing Address Information:**

**For ALL awards** – if an address is included, complete address information must be submitted in the incoming record. Complete address information does not have to be submitted with the incoming record if it is found and pulled from the COD database or FPS.

The following data elements are required to constitute a complete domestic address.

<AddressLine>

<City>

<StateProvinceCode>

<PostalCode>

The following data elements are required to constitute a complete foreign address.

<AddressLine>

<City>

<PostalCode>

<CountryCode>

**Note:** <PostalCode> is **not** required to constitute a complete foreign address but it is recommended to submit a postal code value.

## ROUTING ID

The Routing ID is an identifier assigned to Schools and Third-Party Servicers that is common across the FWS and FSEOG programs.

**BUSINESS RULES**

1. The Routing ID is nested in the Entity complex elements (for example, School, COD, Reporting School, Attended School) on the CB Common Record and serves as a routing number for COD.
2. The Routing ID is a randomly generated eight-character, numeric key. The values in the key do not signify any information about the numbered entity except its identity.
3. Routing IDs are assigned to all post-secondary Schools and Third-Party Servicers in the COD System, and work in conjunction with the FWS and FSEOG School code.

4. The Routing ID can be viewed on the [COD Website](#) by accessing the School Summary page. On the [COD Website](#), the Routing ID is titled the COD ID.

## ENTITY ID

A valid Routing ID is required in the Source, Destination, Reporting School, and Attended School complex elements.

### BUSINESS RULES

1. A valid Routing ID must be reported in the <RoutingID> tag nested within the following Entity complex elements:
  - a. Source, <Source>
  - b. Destination, <Destination>
  - c. Reporting School, <ReportingSchool>
  - d. Attended School, <AttendedSchool>
  - e. A valid Routing ID is the Routing ID for the school or Third-Party Servicer.
2. The Source Routing ID is the physical sender of the document.
  - a. The Source Routing ID must be the same Routing ID listed in the Document ID.
  - b. The Source Routing ID can be a school or Third-Party Servicer.
  - c. Since the Source Entity sends the Common Record document to COD, the TG Destination Number that the Source Entity reported in the SAIG Transmission Header and Trailer is more than likely for the same entity.
3. The Destination Routing ID is the destination or recipient of the document.
  - a. If a School sends the document to the COD System, the Destination Routing ID is "00000001" for COD.
  - b. If the document is sent from the COD System back to the Source, the Destination Routing ID is equal to the Source Routing ID on the original transmission.
  - c. The response file is sent to the TG Number reported in the Transmission Header and Trailer. System generated response file is sent by COD to the TG Number for the school who has reporting relation with the attended school for the award being responded.

### Reporting, Attending Relationships:

Reporting and Attended relationships for the FWS and FSEOG programs will follow the current FISAP reporting. Schools new to the FWS and FSEOG Programs are encouraged to call FSA Partner and School Relations Center to verify that the Reporting/Attended relationships are accurately set in COD prior to transmitting any records. Additionally, schools that report for multiple Attended Schools are encouraged to contact the FSA Partner and School Relations Center to verify these relationships. If COD is unaware of your school's Attended/Reporting relationships, your records will reject with Edit 034.

4. The Reporting School Routing ID is the school that sends and receives data for the campuses or students it serves.

- a. The Reporting School Routing ID must be a school and cannot be a Third-Party Servicer.
  - b. The Reporting School Routing ID does not have to be equal to the Source Routing ID but must have a relationship with the Source Entity and the TG Destination Number.
5. The Attended School Routing ID is the school or campus where the student attends.
  - a. Attended School Routing ID must be equal to the Reporting School Routing ID, OR
  - b. Attended School Routing ID must have an established relationship to the Reporting School Routing ID.
  - c. If the school or campus where the student attends class is not separately eligible, the Reporting School Routing ID must be reported in the Attended School Routing ID tag.
6. Multiple Reporting School Routing IDs and Attended School Routing IDs can be submitted in the same CB Common Record.
7. The COD System checks the Source Routing ID against the COD database and rejects the document if the Routing ID cannot be found or is invalid.
8. When the Source Routing ID cannot be found, the COD System generates a Response with error code 004.
9. When the Source Routing ID is invalid, the COD System generates a Response with error code 001.

### **Funding Relationships:**

The Reporting and Attending relationships reported in the CB Common Record do not affect the funding process. FWS and FSEOG funding relationships are controlled separately from the reporting and attending relationships.

The COD System will default to using the existing TG Mailbox Number associated with the PELL/TEACH/Direct Loan programs at their school, provided they all use the same TG Mailbox Number. If the school has different TG Mailbox Numbers by program, the COD System will default to the PELL TG Mailbox Number. If a school prefers to use a different TG Mailbox Number for the Campus-Based programs, please contact the FSA Partner and School Relations Center.

## **EXAMPLE 1**

In this first example, a CB Common Record is submitted for the FWS program for multiple schools using one TG Number for the SAIG Transmission Batch Header. The Reporting entity is sending the CB Common Record and is reporting awards for two other schools.

### **School A**

- Reports for two additional locations – School B and School C. Therefore, this Routing ID is nested in the Reporting School complex element.
- Sends the CB Common Record to COD. Therefore, School A Routing ID is nested in the Source Entity complex element and the Document ID.
- TG # = 99991. This TG # is used in the SAIG Transmission Batch Header and Trailer.



- Routing ID = 11111111

#### School B

- Has an Attended relationship with School A. This Routing ID is nested in the Attended School complex element tag.
- TG # is not applicable because School A sends the CB Common Record.
- Routing ID = 22222222

#### School C

- Has an Attended relationship with School A. This Routing ID is nested in the Attended School complex element tag.
- TG # is not applicable because School A sends the CB Common Record.
- Routing ID = 33333333

### SAIG Transmission Header Record

#### SAIG Transmission Batch Header Record (Header Destination # - TG #99991)

<ReportingSchool>

<RoutingID>11111111</RoutingID>

<SchoolFinancialSummary>

<FinancialAwardType>FWS</FinancialAwardType>

<CalendarYear>2023</CalendarYear>

<TotalCount>2</TotalCount>

<TotalReportedFunds>3750</TotalReportedFunds>

<TotalFWSEarnings>3750</TotalFWSEarnings>

</SchoolFinancialSummary>

<AttendedSchool>

<RoutingID>22222222</RoutingID>

<Student>

<Index>

```
<SSN>123456789</SSN>
<BirthDate>1987-01-01</BirthDate>
<LastName>SMITH</LastName>
</Index>
<PersonIdentifiers>
<SchoolAssignedPersonID>Student1</SchoolAssignedPersonID>
</PersonIdentifiers>
<Name>
<FirstName>GERALD</FirstName>
<MiddleName>SAMUEL</MiddleName>
<Suffix>Jr</Suffix>
</Name>
<Contacts>
<PermanentAddress>
<AddressLine>123 LANE</AddressLine>
<City>Washington</City>
<StateProvinceCode>DC</StateProvinceCode>
<PostalCode>20001</PostalCode>
</PermanentAddress>
</Contacts>
<Citizenship>
<CitizenshipStatusCode>1</CitizenshipStatusCode>
</Citizenship>
<Note>
<SchoolNoteMessage>test file</SchoolNoteMessage>
</Note>
<FWS>
<CalendarYear>2023</CalendarYear>
```

<FPSTransactionNumber>01</FPSTransactionNumber>

<TotalFWSEarnings>2000</TotalFWSEarnings>

</FWS>

</Student>

</AttendedSchool>

<AttendedSchool>

<RoutingID>33333333</RoutingID>

<Student>

<Index>

<SSN>456789123</SSN>

<BirthDate>1987-07-15</BirthDate>

<LastName>CLARK</LastName>

</Index>

<PersonIdentifiers>

<SchoolAssignedPersonID>Student2</SchoolAssignedPersonID>

</PersonIdentifiers>

</Student>

<Name>

<FirstName>LINDSEY</FirstName>

<MiddleName>DANIEL</MiddleName>

</Name>

<Contacts>

<PermanentAddress>

<AddressLine>414 KENLEY LANE</AddressLine>

<City>ORANGE GROVE CIT</City>

<StateProvinceCode>TX</StateProvinceCode>

<PostalCode>53442</PostalCode>

```
</PermanentAddress>
<TemporaryAddress>
<AddressLine>20 BAKER LANE</AddressLine>
<City>ORANGE GROVE CIT</City>
<StateProvince>ON</StateProvince>
<CountryCode>CA</CountryCode>
</TemporaryAddress>
</Contacts>
<Citizenship>
<CitizenshipStatusCode>01</CitizenshipStatusCode>
</Citizenship>
<Note>
<SchoolNoteMessage>test file</SchoolNoteMessage>
</Note>
<FWS>
<CalendarYear>2023</CalendarYear>
<FPSTransactionNumber>1</FPSTransactionNumber>
<TotalFWSEarnings>1750</TotalFWSEarnings>
</FWS>
</Student>
</AttendedSchool>
</ReportingSchool>
</CBCommonRecord>
```

**SAIG Transmission Batch Trailer Record (Trailer Destination # - TG #999991)**

**SAIG Transmission Trailer Record**

**TOTAL COUNT IN THE REPORTED FINANCIAL SUMMARY COMPLEX  
ELEMENT**

The COD System verifies that the Total Number of Students Tags by Award Type and Calendar Year for an FWS Award or Award Year for a FSEOG Award, <TotalCount>, reported in the Reported Financial Summary complex element equals the total number of student tags by award type and calendar year for an FWS Award or Award Year for a FSEOG Award in the document.

## BUSINESS RULES

1. The COD System determines the actual total number of student tags by award type and award year in the Document by counting the number of Student Identifiers (SSN, Date of Birth and Last Name) for each award type (FWS or FSEOG), award year, and Reporting School Routing ID in the document.

### Student Identifier:

For more information, please refer to the *Student Identifier* topic.

2. The Total Number of Students reported may be a duplicated count. In the event that identical Student Identifiers are reported multiple times within a document for multiple award types or award years, the COD System counts them multiple times.
3. The Total Number of Students is reported by Calendar Year for an FWS Awards and Award Year for a FSEOG award, and by Reporting School Routing ID.

## EXAMPLE 1

In the following example, a CB Common Record is submitted for a student (SSN=123456789, BirthDate="1974-01-01", LastName="SMITH") containing two FWS awards for the same Calendar Year and different Award Year. Since the <TotalCount> is not an unduplicated count of student tags, the student tag is counted twice in the Reported Financial Summary block, once for each award type and award year.

<ReportingSchool>

<RoutingID>00123400</RoutingID>

<SchoolFinancialSummary>

<FinancialAwardType>FWS</FinancialAwardType>

<CalendarYear>2023</CalendarYear>

<AwardYear>2023</AwardYear>

<TotalCount>1</TotalCount>

<TotalReportedFunds>4000</TotalReportedFunds>

<TotalFWSEarnings>10000</TotalFWSEarnings>

</SchoolFinancialSummary>

<SchoolFinancialSummary>

<FinancialAwardType>FWS</FinancialAwardType>

```

<CalendarYear>2023</CalendarYear>

<AwardYear>2024</AwardYear>

<TotalCount>1</TotalCount>

<TotalReportedFunds>6000</TotalReportedFunds>

<TotalFWSEarnings>10000</TotalFWSEarnings>

</SchoolFinancialSummary>

```

## TOTAL REPORTED FUNDS IN THE REPORTED FINANCIAL SUMMARY COMPLEX ELEMENT

The COD System displays a Total Reported Funds for each FWS and FSEOG (for future use) Award Type. The COD System verifies that the Total Reported Funds reported in the School Financial Summary complex element equals the total funds reported on all submitted FWS Awards by the Award Year, while the Total FWS Earnings complex element equals the total earnings on all submitted FWS Awards for the Calendar Year. If an FWS Award is only reported by the Calendar Year, then the Total Reported Funds will equal the Total FWS Earnings. The Total FSEOG complex element (for future use) equals the Total Earnings reported on all submitted FSEOG Awards for the Award Year.

### BUSINESS RULES

1. The FWS Award Program, and FSEOG Program each have their own <TotalReportedFunds> tag.

**Note:** The submitted file will only display the Award Type submitted in the Request File. If only FWS was submitted in the Request File, only the FWS Award Type will be identified. If only FSEOG was submitted in the Request File, only the FSEOG Award Type will be identified. If both Award Types are identified, then they will both be displayed in the Request File.

2. The COD System scans the incoming request file for the <CalendarYear> and <AwardYear> Tags under the Award Type Complex Element Tag in the incoming request file.
  - a. If only the <CalendarYear> tag is identified, then the Total Reported Funds, <TotalReportedFunds> Tag is equal to the Total FWS Earnings <TotalFWSEarnings> Tag.
  - b. If both the <CalendarYear> and <AwardYear> Tags are identified, then the Total Reported Funds, <TotalReportedFunds> is equal to the Total Funds Reported for the Award Year and the Total FWS Earnings, <TotalFWSEarnings> is equal to the Total FWS Earnings for the Calendar Year
3. For FWS Awards, if both Calendar Year and Award Year are identified in the Request File, the COD System compares the Total Reported Funds <TotalReportedFunds> against the actual total of Total FWS Earnings, <TotalFWSEarnings> for each student's FWS Award.
4. The COD System determines the actual total of all Total FWS Earnings in the Financial Summary complex element by adding the values of all the Total FWS Earnings tags associated with each FWS Award in the document.
5. For FSEOG, the COD System compares the Total Reported Funds, <TotalReportedFunds> against the actual total of Total FSEOG, <TotalFSEOG> for each student's FSEOG.

6. The COD System determines the actual total for all Total FSEOG by adding the values of all the Total Reported Funds tags associated with each FSEOG Award in the document.
7. The Total Reported Funds must be reported by calendar year, for FWS Awards and by award year, for FSEOG awards, and by Reporting School Routing ID.

The below example shows how Total Reported Funds is populated for an FWS award for one Calendar and two Award Years:

```
<RoutingID> 00123400</RoutingID>

<SchoolFinancialSummary>
  <FinancialAwardType>FWS</FinancialAwardType>
  <CalendarYear>2023</CalendarYear>
  <AwardYear>2023</AwardYear>
  <TotalCount>1</TotalCount>
  <TotalReportedFunds>2000</TotalReportedFunds>
  <TotalFWSEarnings>5000</TotalFWSEarnings>
</SchoolFinancialSummary>

<SchoolFinancialSummary>
  <FinancialAwardType>FWS</FinancialAwardType>
  <CalendarYear>2023</CalendarYear>
  <AwardYear>2024</AwardYear>
  <TotalCount>1</TotalCount>
  <TotalReportedFunds>3000</TotalReportedFunds>
  <TotalFWSEarnings>5000</TotalFWSEarnings>
</SchoolFinancialSummary>
```

## PERSON IDENTIFIER

The COD Person Identifier is composed of the student's current Social Security Number, current Date of Birth, and current Last Name.

### Current SSN, DOB, Last Name:

Current is defined as the value on COD as of the date of the transmission.

The person's identifier is submitted in the Student Identifier tag. The Student Identifier is a required data element for all award types, must be included in all submissions of the CB Common Record and is

matched against FPS data in most cases (see *Student Identifier and Data Elements Matched against the FPS*).

## BUSINESS RULES

1. The Student Identifiers are located in the Person complex element of the CB Common Record and are reported by the school.
2. A person's identifier consists of the <Student> tag and three attributes: the person's current Social Security Number, current Date of Birth, and current Last Name.
  - a. The Social Security Number (SSN) portion of the Person Identifier must contain nine digits.
  - b. The SSN portion of the Person Identifier must be within the range of 000010001 to 999999999.
  - c. The SSN portion of the Person Identifier may not contain hyphens after the third and fifth digits.
  - d. The Date of Birth (DOB) portion of the Person Identifier must be in the CCYY-MM-DD format.
  - e. The DOB portion of the Person Identifier must be greater than 1922-01-01 and less than 2015-12-31.
  - f. The Last Name portion of the Person Identifier may consist of upper-case letters A-Z, spaces, period, apostrophe, and dash.
  - g. The Last Name portion of the Person Identifier may be blank.
3. All three Person Identifier attributes are required for processing by the COD System.
4. The COD system stores one set of Person Identifiers for each person. Person identifiers are not stored by award.
5. Changes to a person's identifier data elements must be submitted in the Social Security Number, and/or Date of Birth simple element tags under the Person Identifier tag and not in the <Index> tag. Changes in the Index tag will not be recognized by the COD System.
6. On the first submission for a person for a new award year, it is recommended that the school submit the Person Identifier data elements in both the <Person> Complex Element and the <SSN>, <LastName>, and <Date of Birth> simple elements. In some cases, unbeknownst to the school submitting the record, the person already exists on COD with a different Person Identifier data (usually a different last name) due to activity at another school from a previous award year.
7. By submitting the <SSN> and <Date of Birth> simple elements, the school will trigger COD to attempt to change the person's identifier data. If a change is made, all schools with records for that person will receive an SSN/Date of Birth Change Report.
8. In cases where the simple elements are not submitted, the school's award record may still accept (assuming it passes the FPS match, if appropriate, and all other applicable edits), but the Person Identifier data stored on COD will not be updated since COD does not recognize Person Identifier changes submitted in the Index tags. The previous Person Identifier data will appear in all COD system generated transactions and reports until the simple elements are submitted.
9. Alternatively, schools may use the COD Website to search person data by SSN to confirm that the Person Identifier data on COD matches the Person Identifier data on their systems and determine if a Person Identifier change is necessary. Schools may also submit Person Identifier



changes through the COD Website if their software does not permit the submission of the <SSN> and <Date of Birth> simple elements.

10. Regardless of whether the changed simple element is accepted or rejected by the COD System, the person's old identifier is returned in the Response.
11. If the changed simple element is accepted, the school must submit the new Person Identifier combination in future transmissions.
12. If the changed simple element is rejected, the person's old identifier combination must be used in future transmissions.
13. The COD System stores the previously submitted Social Security Number for query purposes.
14. If the <SSN> and <Date of Birth> simple element is submitted with the same value that is listed in the attribute on the COD System, no update takes place.

## CHANGING STUDENT IDENTIFIER INFORMATION

To change Student Identifier information, the school or student must first submit a correction to the ISIR, which will result in another transaction on the FPS. After the correction has been submitted to and accepted by the FPS, the school must send a CB Common Record to the COD System reporting the student tag with the previously reported Student Identifier information currently stored on COD and the changed data in the corresponding simple element tag (Social Security Number, Date of Birth, or Last Name).

### ISIR:

Please refer to the Institutional Student Information Record entry in Volume 6, Section 1 – Glossary of Terms for more information.

## BUSINESS RULES

1. COD stores one Student Identifier for a student; COD does not store separate Student Identifiers for each award.
2. Changes to the Student Identifier data elements must be submitted using the Social Security Number, Date of Birth, and Last Name simple element tags and NOT in the Student tag. Changes submitted in the Student tag will not be recognized by the COD System.

On the first submission for a student for a new award year, it is recommended that the school submit student identifier data elements in both the Student Complex Element and the SSN, Last Name, and Date of Birth simple elements. In some cases, unbeknownst to the school submitting the record, students have already existed on COD with different Person Identifier data (usually a different Last Name) due to activity at another school for a previous award year.

By submitting the SSN, Last Name, and Date of Birth simple elements, the school will trigger COD to attempt to change the student's identifier data for the student. If a change is made, all schools with records for that student will receive an SSN/Name/Date of Birth Change Report.

In these cases, if the simple elements are not submitted, the school's award record may still accept (assuming it passes the FPS match and all other applicable edits), but the Person Identifier data stored on COD will not be updated since COD does not recognize Person Identifier changes submitted in the Student tag. The previous Person Identifier data will appear in all COD System generated transactions and reports until the simple elements are submitted.

Alternatively, schools may use the COD Website to search person data by SSN to confirm that the Person Identifier data on COD matches the Person Identifier on their systems and determine if a Person Identifier change is necessary. Schools may also submit Person Identifier changes through the COD Website if their software does not permit submission of the SSN, Last Name, and Date of Birth simple elements.

3. Upon receipt of a changed Social Security Number, Date of Birth, or Last Name simple element from the school, the COD System attempts to match the changed simple element tag against the FPS.
  - a. If an identical change is found on the FPS, the COD System accepts the changed simple element, updates the Student Identifier, and sends a Response to the school.

**Note:**

Due to the order in which COD matches student identifier data elements with the FPS, it is possible that COD will return error code 012 on SSN even when a school submitted a change on Date of Birth or Last Name, if the Date of Birth and/or Name has not been updated on the FPS. Please refer to the Student Identifier and Data Elements Matched against the FPS topic for more information.

- If an identical change is not found on the FPS, the COD System rejects the changed simple element and sends a Response to the school with Reject Edit 012.
4. Regardless of whether the changed simple element is accepted or rejected by the COD System, the old Student Identifier is returned in the Response.
  5. If the changed simple element is accepted, the school must submit the new Student Identifier combination in future transmissions.
  6. If the changed simple element is rejected, the old Student Identifier combination must be used in future transmissions.
  7. The COD System stores the Social Security Number, previously submitted to the COD System for query purposes on the COD Website.
  8. If the Social Security Number, Date of Birth, or Last Name simple elements is submitted with the same value that is listed in the attribute on the COD System, no update takes place. If the award year submitted on the change record is lower than the highest award year listed for the student on the COD System, or if the FPS transaction number on the change record is either lower than the highest FPS transaction number on the COD System for that award year and student or equal to the highest FPS transaction number and the Person Identifier data does not match with FPS, no update takes place.
  9. If a combination of the current Social Security Number, current Date of Birth, or current Last Name simple elements are changed in the same submission, all changes must be matched on the FPS.
    - a. If all changes are not matched on the FPS, the COD System rejects all changed simple elements and the old Student Identifier is returned in the Response to the school.

## EXAMPLE

A student's last name changes from Oldhat to Newbry. Once the correction has been submitted to the FPS, the appropriate submission to the COD System is:

<Student>

```
<Index>
  <SSN>123456789</SSN>
  <BirthDate>1974-01-01</BirthDate>
  <LastName>OLDHAT</LastName>
</Index>
<Name>
  <LastName>NEWBRY</LastName>
</Name>
</Student>
```

The COD Response contains the old student identifier:

```
<Student>

  <Index>
    <SSN>123456789</SSN>
    <BirthDate>1974-01-01</BirthDate>
    <LastName>OLDHAT</LastName>
  </Index>

</Student>
```

If the COD System accepts the change, subsequent transmissions by the school must contain:

```
<Student>

  <Index>
    <SSN>123456789</SSN>
    <BirthDate>1974-01-01</BirthDate>
    <LastName>NEWBRY</LastName>
  </Index>

</Student>
```

If the COD System rejects the change, subsequent transmissions by the school must contain:

```
<Student>

  <Index>
    <SSN>123456789</SSN>
    <BirthDate>1974-01-01</BirthDate>
    <LastName>OLDHAT</LastName>
  </Index>

</Student>
```

## FPS TRANSACTION NUMBER

The FPS Transaction Number is a required field on the CB Common Record for FWS and FSEOG processing.

### FPS Transaction Number:

The COD System matches student identifier information against data pulled from the FPS.

## BUSINESS RULES

1. The FPS Transaction Number is a required field on the CB Common Record for FWS and FSEOG Award information.
2. For a submitted FWS award, the COD System will attempt to match the student to a valid FPS transaction from either Award Year contained in the submitted Calendar Year.
  - a. For example, for the 2023 Calendar Year, the COD System will attempt to match to a valid FPS transaction in either the '22-'23 or '23-'24 Award Years.
3. If a school is reporting at an Award Year level, then the school should report the FPS transaction that the student was paid on for that corresponding Award Year.
  - a. For example, if reporting for the '22-'23 Award Year, then report the transaction the student was paid on for the '22-'23 Award Year.
4. If a school is reporting at a Calendar Year level, then the school should report the applicable transaction number for the Award Year the student was paid on.
  - a. For example, if reporting for Calendar Year 2023 and the student was paid using the '22-'23 Award Year transaction, then report the transaction the student was paid on for the '22-'23 Award Year.
5. If a school is reporting at a Calendar Year level and the student was paid using transactions from both award years in that Calendar Year, report the applicable transaction number for the highest Award Year the student was paid on.
  - a. For example, if reporting for Calendar Year 2023 and the student was paid using transactions from both the '22-'23 and '23-'24 Award Years, then report the transaction the student was paid on for the '23-'24 Award Year.

## STUDENT IDENTIFIER AND DATA ELEMENTS MATCHED AGAINST THE FPS

COD performs two student matches against FPS. The first match confirms that the Student Identifier exists on the FPS. This match does not utilize the FPS Transaction Number submitted by the school. The second match validates certain data elements for editing purposes. This match utilizes the FPS Transaction Number submitted by the school.

### BUSINESS RULES

1. The COD System stores one Student Identifier for a student. The COD System does not store separate Student Identifiers for each award.
2. The FPS Transaction Number is stored at the Award level; the COD System stores a separate FPS Transaction Number for each award.
3. The COD System performs a match against the FPS when a CB Common Record contains:
  - a. A new student with an award (*please see example 1*)
  - b. A change to the Student Identifier (*please see example 2*)
  - c. A new award with a new FPS Transaction Number (*please see example 2*)
  - d. An existing award with a new FPS Transaction Number

- i. *No changes would occur in the COD System and the new FPS Transaction Number would be stored, provided it matches the FPS Record*
4. When a CB Common Record contains a **new student** with a FWS or FSEOG award:
  - a. COD matches the SSN, Date of Birth, and the FPS Transaction Number with data from FPS.
  - b. COD uses the FPS Transaction Number submitted to pull data elements from FPS for processing the award.
5. When a CB Common Record contains a **change to a Student Identifier**:
  - a. COD Checks that **any** FPS Transaction Number greater than the FPS Transaction Number used to establish the student exists in the data from FPS. If the FPS Transaction Number on the change record is either lower than the highest FPS Transaction Number on the COD System or equal to the highest FPS Transaction Number and the Person Identifier data does not match FPS, no update to the student identifier takes place.
6. When a CB Common Record contains a new award for an existing student:
  - a. COD matches the SSN, Date of Birth, and the FPS Transaction Number with data from FPS.
  - b. COD uses the FPS Transaction Number submitted to pull data elements from FPS for processing the award.
  - c. If the student identifier data elements do not match the SPECIFIC FPS Transaction Number, the record will reject with edit code 24.
7. When a CB Common Record contains a **new FPS Transaction Number** for an existing award:
  - a. COD matches the SSN, Date of Birth, and the FPS Transaction Number with data from FPS.
  - b. COD uses the new FPS Transaction Number submitted to pull data elements from FPS for processing the award.
  - c. COD does NOT match the student identifier data elements with the FPS Transaction Number submitted in the Award complex element.
8. COD matches the student identifier data elements in the following order: SSN, and Date of Birth.

It is possible that COD will return Reject Edit 012 on SSN even when a school submitted a change on Date of Birth or Name if the Name and/or Date of Birth have not been updated on the FPS.

9. When a new award is submitted with an FPS Transaction Number already used by a previously accepted award for the same student, a new FPS match is NOT performed.
10. A later FPS Transaction Number submitted by a student or another school does NOT affect a match performed using an earlier FPS Transaction Number.

## EXAMPLE 1: NEW STUDENT, NEW AWARD

A school submits an FWS award for a student (SSN: 318888888, DOB: 1983-03-04) using FPS Transaction Number 01. There is a match at COD on the FPS data.

**FPS**

FPS Transaction #	SSN	DOB	Last Name
01	318888888	1983-03-04	JONES

Table 5

This establishes the student on the COD Database.

**Transactions**

Award	Total FWS Earnings	FPS Transaction	Status
FWS	\$500	01	Accepted

Table 6

## EXAMPLE 2: NEW AWARD, NEW FPS TRANSACTION NUMBER AND CHANGE TO STUDENT IDENTIFIER

The student gets married resulting in a Name change from Jones to Taylor. These changes have already been reported to FPS resulting in an FPS Transaction Number 03.

The school submits an FWS award using FPS Transaction Number 03 and the current information for the student with SSN = 318888888, DOB = 1983-03-04, and Last Name = Jones but also submits the name change of Taylor. The FWS award is accepted as there is a match with FPS data at COD for the SSN and Date of Birth and FPS Transaction Number 03.

**FPS**

FPS Transaction #	SSN	DOB	Last Name
01	318888888	1983-03-04	JONES
02	318888888	1983-03-04	JONES
03	318888888	1983-03-04	TAYLOR

Table 7

The student's last name is updated to Taylor.

**Transactions**

Award	Award Year	Amount	FPS Transaction	Status
FWS	2022	\$500	1	Accepted
FWS	2023	\$1000	3	Accepted

Table 8

## DATA ELEMENTS PULLED FROM THE FPS

The COD System pulls certain data elements from information provided by the FPS for editing purposes only.

### BUSINESS RULES

1. The COD System uses the FPS Transaction Number reported in the Award complex element to pull certain data elements from information provided by the FPS.
2. The COD System determines if certain data elements are transmitted in the CB Common Record or already exist for the student and award year on the COD System. If neither is true, the COD System will 'pull' these data elements from information provided by the FPS.
  - a. For each FWS and FSEOG award received, the following data elements are pulled from the highest FPS Transaction Number for the same award year when absent on both the CB Common Record submission and the COD System:
    - i. First Name
    - ii. Citizenship Status
    - iii. Address (full address)

## Citizenship Status Code Processing for FWS and FSEOG

The COD System accepts a value of '1' – 'U.S. Citizen', '2' – 'Eligible Non-Citizen', or '3' – 'Not Eligible' in the Citizenship Status Code field as a valid value to process FWS or FSEOG awards. If a Citizenship Status Code of '1' or '2' is submitted on the CB Common Record, the COD System will accept and build the award. If a value other than '1' or '2' is submitted on the Common Record, COD will reject the student.

### BUSINESS RULES

- If the Citizenship Status Code field is not populated on the incoming origination, the COD System will now evaluate the values from the FPS data. If the Citizenship Status Code is not populated, the COD System will evaluate the value in the 'Social Security Administration (SSA) Citizenship Flag' field.
- If the SSA Citizenship Flag field from FPS is 'blank' or 'A', COD will accept and build the award with a Citizenship Status of '1'. If the SSA Citizenship Flag field on FPS is a value other than 'A' or 'blank', COD will look for a value in the 'DHS Match Flag' field on the FPS data. If a value of 'Y' is found in the DHS Match Flag, the COD System will accept and build the Citizenship Status with a value of '2'. If there is any value other than 'Y' in the DHS Match Flag, COD will check the value in the 'Secondary DHS Match Flag' field of the FPS data.
- If the Secondary DHS Match Flag has a value of 'Y', COD will accept and build the award with a Citizenship Status of '2'.
- COD will reject a new origination record if the Citizenship Status Code is not submitted on the incoming origination, the SSA Citizenship Status field is not 'A' or 'blank', the DHS Match Flag is a value other than 'Y', and the Secondary DHS Match Flag is a value other than 'Y'. If a value is pulled from FPS, this will be stored on the COD System but will not be returned on the Common Record response.

## EXAMPLE

The COD Response complex element contains the <CitizenshipStatusCode> field within the Citizenship complex submitted in the CB Common Record:

```
<Citizenship>
    <CitizenshipStatusCode>1</CitizenshipStatusCode>
</Citizenship>
```

## Note Message Field

A School Note Message field, <SchoolNoteMessage>, is included on the CB Common Record. It is nested within the <Note> complex element, which is nested within the Person and Award complex elements. This field can be used by the school for any purpose and is ignored during COD processing.

### BUSINESS RULES

1. Regardless of whether the school opts for a Full or Standard Response, the School Note Message field is returned in the same Person and Award complex elements as was submitted by the school.
2. The School Note Message Tag is optional for schools to populate.
3. The School Note Message field can be viewed and modified on the [COD Website](#) for award and disbursement records.
4. No field level compression is allowed in this field.

## EXAMPLE

The school uses a unique Person Identifier for the student in their system. The school uses the <SchoolNoteMessage> field in the Student Award complex element to record this unique Person Identifier.

```
<Student>
    <Index>
        <SSN>123456789</SSN>
        <BirthDate>1973-01-01</BirthDate>
        <LastName>SMITH</LastName>
    </Index>
    <Note>
        <SchoolNoteMessage>888888</SchoolNoteMessage>
    </Note>
</Student>
```



The COD Response complex element contains the <SchoolNoteMessage> field with the content submitted in the CB Common Record:

```
<Student>
  <Index>
    <SSN>123456789</SSN>
    <BirthDate>1973-01-01</BirthDate>
    <LastName>SMITH</LastName>
  </Index>
  <Note>
    <SchoolNoteMessage>888888</SchoolNoteMessage>
  </Note>
</Student>
```

## UPDATING PHONE NUMBERS

The COD System only stores one phone number for each person.

### BUSINESS RULES

1. The Common Record allows for a maximum occurrence of three phone number tags per person; however the COD System stores only one or the last occurrence (if more than one is submitted) of phone number as Home Phone.
  - a. The COD System does not store a value for Alternate Phone 1 or Alternate Phone 2.

## ESTABLISHING AN INITIAL FWS AWARD

Schools can choose to report FWS wages at either the Calendar Year level or Calendar AND Award Year level. Once a reporting method is chosen, additional FWS earnings may not be reported using the other method for that student during the same Calendar Year.

Award information is required when creating all initial FWS awards on the web or by CB Common Record submission to the COD System.

### BUSINESS RULES

1. The following award level data elements are required for establishing an FWS award:
  - a. Calendar Year <CalendarYear>
    - Award Year <AwardYear> is required if reporting Total FWS Earnings at a Calendar and Award Year level.

- i. If included, the award year submitted must include the corresponding calendar year within the award year range. For example: for calendar year 2023, the applicable award years include '22-'23 and '23-'24.
  - b. FPS Transaction Number <FPSTransactionNumber>
  - c. Total FWS Earnings <TotalFWSEarnings>
    - This value must be a whole number. For example: \$1000.
    - Report calendar year wages in the same manner that you would pull such data to produce on a W-2, you should follow the W-2 guidelines/instructions: [https://www.irs.gov/instructions/iw2w3#en\\_US\\_2023\\_publink1000308326](https://www.irs.gov/instructions/iw2w3#en_US_2023_publink1000308326).
    - Per the IRS guidance, determining the amount of wages to include on the W2 should be based on when the wages were paid out, not necessarily when the hours were worked. The IRS states the following: The entries on Form W-2 must be based on wages paid during the calendar year. Use Form W-2 for the correct tax year. For example, if the employee worked from December 17, 2023, through December 30, 2023, and the wages for that period were paid on January 2, 2024, include those wages on the 2024 Form W-2.
2. FWS fields marked as “For Future Use” in the CB Common Record XML Schema may be included in initial award submission but will not be stored in the COD System.

## EXAMPLE 1: REPORTING BY CALENDAR YEAR ONLY

```

<ReportingSchool>

<RoutingID>11111111</RoutingID>

<SchoolFinancialSummary>

    <FinancialAwardType>FWS</FinancialAwardType>

    <CalendarYear>2023</CalendarYear>

    <TotalCount>1</TotalCount>

    <TotalReportedFunds>2000</TotalReportedFunds>

    <TotalFWSEarnings>2000</TotalFWSEarnings>

</SchoolFinancialSummary>

<AttendedSchool>

    <RoutingID>11111111</RoutingID>

<Student>

<Index>

    <SSN>123456789</SSN>
  
```

```
<BirthDate>1987-01-01</BirthDate>

<LastName>SMITH</LastName>

</Index>

<Name>

  <FirstName>GERALD</FirstName>

  <MiddleName>SAMUEL</MiddleName>

  <Suffix>Jr</Suffix>

</Name>

<Contacts>

<PermanentAddress>

  <AddressLine>123 LANE</AddressLine>

  <City>Washington</City>

  <StateProvinceCode>DC</StateProvinceCode>

  <PostalCode>20001</PostalCode>

</PermanentAddress>

</Contacts>

<Citizenship>

  <CitizenshipStatusCode>1</CitizenshipStatusCode>

</Citizenship>

<Note>

  <SchoolNoteMessage>test file</SchoolNoteMessage>

</Note>

<FWS>

  <CalendarYear>2023</CalendarYear>

  <FPSTransactionNumber>01</FPSTransactionNumber>

  <TotalFWSEarnings>2000</TotalFWSEarnings>

</FWS>

</Student>
```

</AttendedSchool>

</ReportingSchool>

</CBCCommonRecord>

## EXAMPLE 2: REPORTING BY CALENDAR YEAR AND AWARD YEAR

<ReportingSchool>

<RoutingID>11111111</RoutingID>

<SchoolFinancialSummary>

<FinancialAwardType>FWS</FinancialAwardType>

<CalendarYear>2023</CalendarYear>

<AwardYear>2023</AwardYear>

<TotalCount>1</TotalCount>

<TotalReportedFunds>2000</TotalReportedFunds>

<TotalFWSEarnings>2000</TotalFWSEarnings>

</SchoolFinancialSummary>

<AttendedSchool>

<RoutingID>11111111</RoutingID>

<Student>

<Index>

<SSN>123456789</SSN>

<BirthDate>1987-01-01</BirthDate>

<LastName>SMITH</LastName>

</Index>

<Name>

<FirstName>GERALD</FirstName>

<MiddleName>SAMUEL</MiddleName>

<Suffix>Jr</Suffix>

</Name>

```
<Contacts>
<PermanentAddress>
<AddressLine>123 LANE</AddressLine>
<City>Washington</City>
<StateProvinceCode>DC</StateProvinceCode>
<PostalCode>20001</PostalCode>
</PermanentAddress>
</Contacts>
<Citizenship>
<CitizenshipStatusCode>1</CitizenshipStatusCode>
</Citizenship>
<Note>
<SchoolNoteMessage>test file</SchoolNoteMessage>
</Note>
<FWS>
<CalendarYear>2023</CalendarYear>
<AwardYear>2023</AwardYear>
<FPSTransactionNumber>01</FPSTransactionNumber>
<TotalFWSEarnings>2000</TotalFWSEarnings>
</FWS>
</Student>
</AttendedSchool>
</ReportingSchool>
</CBCCommonRecord>
```

### EXAMPLE 3: REPORTING BY CALENDAR YEAR AND MULTIPLE AWARD YEARS

```
<ReportingSchool>
<RoutingID>11111111</RoutingID>
```

```
<SchoolFinancialSummary>
<FinancialAwardType>FWS</FinancialAwardType>
<CalendarYear>2023</CalendarYear>
<AwardYear>2023</AwardYear>]
<TotalCount>2</TotalCount>
<TotalReportedFunds>3500</TotalReportedFunds>
<TotalFWSEarnings>8000</TotalFWSEarnings>
</SchoolFinancialSummary>
<SchoolFinancialSummary>
<FinancialAwardType>FWS</FinancialAwardType>
<CalendarYear>2023</CalendarYear>
<AwardYear>2024</AwardYear>]
<TotalCount>2</TotalCount>
<TotalReportedFunds>4500</TotalReportedFunds>
<TotalFWSEarnings>8000</TotalFWSEarnings>
</SchoolFinancialSummary>
```

```
<AttendedSchool>
<RoutingID>11111111</RoutingID>
<Student>
<Index>
<SSN>123456789</SSN>
<BirthDate>1987-01-01</BirthDate>
<LastName>SMITH</LastName>
</Index>
<Name>
<FirstName>GERALD</FirstName>
<MiddleName>SAMUEL</MiddleName>
```

```
<Suffix>Jr</Suffix>

</Name>

<Contacts>

<PermanentAddress>

<AddressLine>123 LANE</AddressLine>

<City>Washington</City>

<StateProvinceCode>DC</StateProvinceCode>

<PostalCode>20001</PostalCode>

</PermanentAddress>

</Contacts>

<Citizenship>

<CitizenshipStatusCode>1</CitizenshipStatusCode>

</Citizenship>

<Note>

<SchoolNoteMessage>test file</SchoolNoteMessage>

</Note>

<FWS>

<CalendarYear>2023</CalendarYear>

<AwardYear>2023</AwardYear>

<FPSTransactionNumber>01</FPSTransactionNumber>

<TotalFWSEarnings>2000</TotalFWSEarnings>

</FWS>

<FWS>

<CalendarYear>2023</CalendarYear>

<AwardYear>2024</AwardYear>

<FPSTransactionNumber>01</FPSTransactionNumber>

<TotalFWSEarnings>2000</TotalFWSEarnings>

</FWS>
```

```
</Student>
<Student>
<Index>
<SSN>112232345</SSN>
<BirthDate>1982-01-01</BirthDate>
<LastName>JONES</LastName>
</Index>
<Name>
<FirstName>BOB</FirstName>
<MiddleName>THOMAS</MiddleName>
</Name>
<Contacts>
<PermanentAddress>
<AddressLine>12 First Street</AddressLine>
<City>Washington</City>
<StateProvinceCode>DC</StateProvinceCode>
<PostalCode>20001</PostalCode>
</PermanentAddress>
</Contacts>
<Citizenship>
<CitizenshipStatusCode>1</CitizenshipStatusCode>
</Citizenship>
<Note>
<SchoolNoteMessage>test file</SchoolNoteMessage>
</Note>
<FWS>
<CalendarYear>2023</CalendarYear>
<AwardYear>2023</AwardYear>
```



<FPSTransactionNumber>01</FPSTransactionNumber>

<TotalFWSEarnings>1500</TotalFWSEarnings>

</FWS>

<FWS>

<CalendarYear>2023</CalendarYear>

<AwardYear>2024</AwardYear>

<FPSTransactionNumber>01</FPSTransactionNumber>

<TotalFWSEarnings>2500</TotalFWSEarnings>

</FWS>

</Student>

</AttendedSchool>

</ReportingSchool>

</CBCommonRecord>

## UPDATING AN FWS AWARD

This section details the options that Schools, Third-Party Servicers (TPS), and EdExpress Users have to make updates on submitted and existing FWS Awards. Users can edit most aspects of existing FWS Awards except for the School, Calendar Year, and Award Year (if submitted) submitted in the Award.

### FWS Awards

Updates can be made to previously reported FWS earnings, provided the Maintenance method matches the original reporting method – either at the Calendar Year level or Calendar AND Award Year level.

As a reminder, Schools can choose to report FWS wages at either the Calendar Year level or Calendar AND Award Year level. Once a reporting method is chosen, additional FWS earnings may not be reported using the other method for that student during the same Calendar Year.

The following fields are editable for FWS Awards:

- FPS Transaction Number
- Total FWS Earnings

### BUSINESS RULES

1. Updates to an existing FWS award include only changes to the <FPSTransactionNumber> or <TotalFWSEarnings> fields. Updates to these fields will replace the values stored in the COD System.

- a. If an FWS award was previously accepted for the Calendar Year, additional submissions of an FWS award for the same school, student and Calendar Year will be interpreted by the COD System as a Maintenance Record.
  - b. If an FWS award was previously accepted for the Calendar Year and Award Year, additional submissions of an FWS award for the same school, student and Calendar Year and Award Year will be interpreted by the COD System as a Maintenance Record.
2. If an FWS award was previously accepted by the COD System using the Calendar Year reporting method, and a school submits an additional award for the same student and Calendar Year using the Award Year and Calendar Year reporting method the COD System will reject the award with Edit 300 unless the FWS Earnings on the previously accepted award have been reduced to \$0.
3. If an FWS award was previously accepted by the COD System using the Calendar Year and Award Year reporting method and a school submits an additional award for the same student and Calendar Year using the Calendar Year reporting method the COD System will reject the award with Edit 300 unless the FWS Earnings on the previously accepted award have been reduced to \$0.
4. For a given Calendar Year, a student can have a maximum of two FWS awards at the same School, provided that two separate Award Years are included.

## REPORTING DEADLINES

The deadline for reporting FWS awards will be the end of the FAFSA processing year. For Calendar Year 2023, COD System will accept new FWS awards and updates to existing FWS awards until September 13, 2026 for the '25-'26 FAFSA year. Any FWS records received for the Calendar Year 2023 will trigger Edit 301 if submitted after the reporting deadline.

## FULL OR STANDARD RESPONSE

This processing option determines whether the COD System returns to the school a Full or Standard Response to Common Records processed by the COD System.

### BUSINESS RULES

1. A Full Response contains all the original tags sent by the School and the rejected data elements and reason codes.
2. A Standard Response contains minimum-level details of the submitted batch, and the rejected data elements and reason codes.
3. This option defaults to a Standard Response.

EDEXpress users will always request a Full Response.

4. Schools can override this option on a record-by-record basis by submitting the <FullResponseCode> tag on the Common Record.
5. If the <FullResponseCode> tag is not sent, the option defaults to Standard Response.

## EXAMPLE 1: FULL RESPONSE CONTAINS ALL THE ORIGINAL TAGS SENT BY THE SCHOOL WITH THE ASSUMPTION THAT THERE IS NO REJECTED DATA ELEMENTS

```
<?xml version="1.0" encoding="UTF-8"?>
<CBCommonRecord xmlns="http://www.ed.gov/FSA/COD/CAMPUS_BASED/2024/v1.0b"
  xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
  xsi:schemaLocation="http://www.ed.gov/FSA/COD/CAMPUS_BASED/2024/v1.0b
    CBCommonRecord1.0b.xsd">
  <TransmissionData>
    <DocumentID>2024-10-07T14:33:09.4510000396</DocumentID>
    <CreatedDateTime>2024-10-07T14:33:09.04</CreatedDateTime>
  <CSource>
    <COD>
      <RoutingID>00000001</RoutingID>
    </COD>
    </Source>
    <Destination>
      <School>
        <RoutingID>11111111</RoutingID>
      </School>
      </Destination>
      <Software>
        <SoftwareProvider>mite</SoftwareProvider>
        <SoftwareVersion>2.0</SoftwareVersion>
        <OtherSoftwareProvider>othermite</OtherSoftwareProvider>
        <OtherSoftwareVersion>4.0</OtherSoftwareVersion>
      </Software>
      <FullResponseCode>F</FullResponseCode>
    </TransmissionData>
    <ReportingSchool>
      <RoutingID>11111111</RoutingID>
    <SchoolFinancialSummary>
      <FinancialAwardType>FWS</FinancialAwardType>
      <CalendarYear>2023</CalendarYear>
```

```
<TotalCount>1</TotalCount>
<TotalReportedFunds>1750</TotalReportedFunds>
<TotalFWSEarnings>1750</TotalFWSEarnings>
</SchoolFinancialSummary>
<AttendedSchool>
  <RoutingID>11111111</RoutingID>
</Student>
  <Index>
    <SSN>999999997</SSN>
    <BirthDate>1967-07-28</BirthDate>
    <LastName>GUILLOTTE</LastName>
  </Index>
  <PersonIdentifiers>
    <SchoolAssignedPersonID>student1</SchoolAssignedPersonID>
  </PersonIdentifiers>
  <Birth>
    <BirthDate>1967-08-28</BirthDate>
  </Birth>
  <Name>
    <FirstName>LINDSEYLINDSEYLINDSEYLINDSEYLINDSEY</FirstName>
    <MiddleName>DANIELLEDANIELLEDANIELLEDANIELLEDAN</MiddleName>
    <LastName>GUILLOTTE</LastName>
    <Suffix>JUNIOR 11</Suffix>
  </Name>
  <Contacts>
    <PermanentAddress>
      <AddressLine>414 KENLEY LANE</AddressLine>
      <City>ORANGE GROVE CIT</City>
      <StateProvinceCode>TX</StateProvinceCode>
      <PostalCode>53442</PostalCode>
    </PermanentAddress>
```

```
<TemporaryAddress>
  <AddressLine>KENLEY LANE</AddressLine>
  <City>ORANGE GROVE CIT</City>
  <StateProvince>ON</StateProvince>
  <PostalCode>K0A 0A2</PostalCode>
  <CountryCode>CA</CountryCode>
</TemporaryAddress>
</Contacts>
<Citizenship>
  <CitizenshipStatusCode>1</CitizenshipStatusCode>
</Citizenship>
<Note>
  <SchoolNoteMessage>test file</SchoolNoteMessage>
</Note>
<FWS>
  <CalendarYear>2023</CalendarYear>
  <FPSTransactionNumber>01</FPSTransactionNumber>
  <TotalFWSEarnings>1750</TotalFWSEarnings>
</Response>
  <ResponseCode>A</ResponseCode>
</Response>
</FWS>
<Response>
  <ResponseCode>A</ResponseCode>
</Response>
</Student>
</AttendedSchool>
<Response>
<ResponseFinancialSummary>
  <FinancialAwardType>FWS</FinancialAwardType>
  <CalendarYear>2023</CalendarYear>
```

```

    <TotalCount>1</TotalCount>
    <TotalCountAccepted>1</TotalCountAccepted>
    <TotalReportedFunds>1750</TotalReportedFunds>
    <TotalFinancialAwardAccepted>1750</TotalFinancialAwardAccepted>
  </ResponseFinancialSummary>
  <ResponseCode>A</ResponseCode>
</Response>
</ReportingSchool>
<Response>
  <DocumentTypeCode>CB</DocumentTypeCode>
  <DocumentStatusCode>A</DocumentStatusCode>
  <ProcessDate>2023-07-20</ProcessDate>
</Response>
</CBCommonRecord>

```

## EXAMPLE 2: STANDARD RESPONSE CONTAINS ONLY THE REJECTED DATA ELEMENTS AND REASON CODES.

```

<?xml version="1.0" encoding="UTF-8"?>
<CBCommonRecord xmlns="http://www.ed.gov/FSA/COD/CAMPUS_BASED/2024/v1.0b"
  xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
  xsi:schemaLocation="http://www.ed.gov/FSA/COD/CAMPUS_BASED/2024/v1.0b
    CBCommonRecord1.0b.xsd">
  <TransmissionData>
    <DocumentID>2024-10-07T14:33:09.4510000396</DocumentID>
    <CreatedDateTime>2024-10-07T14:33:09.04</CreatedDateTime>
  </Source>
    <COD>
      <RoutingID>00000001</RoutingID>
    </COD>
  </Source>
  <Destination>
    <School>

```

```
<RoutingID>11111111</RoutingID>
</School>
</Destination>
<Software>
  <SoftwareProvider>mite</SoftwareProvider>
  <SoftwareVersion>2.0</SoftwareVersion>
</Software>
<FullResponseCode>S</FullResponseCode>
</TransmissionData>
<ReportingSchool>
  <RoutingID>11111111</RoutingID>
<SchoolFinancialSummary>
  <FinancialAwardType>FWS</FinancialAwardType>
  <CalendarYear>2023</CalendarYear>
  <TotalCount>1</TotalCount>
  <TotalReportedFunds>1750</TotalReportedFunds>
  <TotalFWSEarnings>1750</TotalFWSEarnings>
</SchoolFinancialSummary>
  <AttendedSchool>
    <RoutingID>11111111</RoutingID>
<Student>
  <Index>
    <SSN>999999997</SSN>
    <BirthDate>1967-07-28</BirthDate>
    <LastName>GUILLLOTTE</LastName>
  </Index>
<Note>
  <SchoolNoteMessage>test file</SchoolNoteMessage>
</Note>
<FWS>
  <CalendarYear>2023</CalendarYear>
```

```
<FPSTransactionNumber>1</FPSTransactionNumber>
<Response>
  <ResponseCode>R</ResponseCode>
<EditProcessResult>
  <ResponseErrorCode>024</ResponseErrorCode>
  <ResponseErrorField>FPSTransactionNumber</ResponseErrorField>
</EditProcessResult>
</Response>
</FWS>
</Student>
</AttendedSchool>
<Response>
<ResponseFinancialSummary>
  <FinancialAwardType>FWS</FinancialAwardType>
  <CalendarYear>2023</CalendarYear>
  <TotalCount>1</TotalCount>
  <TotalCountAccepted>0</TotalCountAccepted>
  <TotalCountRejected>1</TotalCountRejected>
  <TotalCountDuplicate>0</TotalCountDuplicate>
  <TotalReportedFunds>1750</TotalReportedFunds>
  <TotalFinancialAwardAccepted>0</TotalFinancialAwardAccepted>
</ResponseFinancialSummary>
<ResponseCode>R</ResponseCode>
</Response>
</ReportingSchool>
<Response>
  <DocumentTypeCode>CB</DocumentTypeCode>
  <DocumentStatusCode>R</DocumentStatusCode>
  <ProcessDate>2023-07-20</ProcessDate>
</Response>
</CBCommonRecord>
```



### EXAMPLE 3: STANDARD RESPONSE WITH ACCEPTED AWARDS

```
<?xml version="1.0" encoding="UTF-8"?>

<CBCommonRecord xmlns="http://www.ed.gov/FSA/COD/CAMPUS_BASED/2024/v1.0b"
xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
    xsi:schemaLocation="http://www.ed.gov/FSA/COD/CAMPUS_BASED/2024/v1.0b
        CBCommonRecord1.0b.xsd">

  <TransmissionData>

    <DocumentID>2024-10-07T14:33:09.4510000396</DocumentID>

    <CreatedDateTime>2024-10-07T14:33:09.04</CreatedDateTime>

  <Source>

    <COD>

      <RoutingID>00000001</RoutingID>

    </COD>

  </Source>

  <Destination>

    <School>

      <RoutingID>11111111</RoutingID>

    </School>

  </Destination>

  <Software>

    <SoftwareProvider>mite</SoftwareProvider>

    <SoftwareVersion>2.0</SoftwareVersion>

  </Software>

  <FullResponseCode>S</FullResponseCode>

</TransmissionData>

<ReportingSchool>

  <RoutingID>11111111</RoutingID>

</ReportingSchool>

<SchoolFinancialSummary>

  <FinancialAwardType>FWS</FinancialAwardType>

  <CalendarYear>2023</CalendarYear>

  <TotalCount>1</TotalCount>

</SchoolFinancialSummary>

</CBCommonRecord>
```

```
<TotalReportedFunds>1750</TotalReportedFunds>
<TotalFWSEarnings>1750</TotalFWSEarnings>
</SchoolFinancialSummary>
  <AttendedSchool>
    <RoutingID>11111111</RoutingID>
  </AttendedSchool>
</SchoolFinancialSummary>
<Student>
  <Index>
    <SSN>999999997</SSN>
    <BirthDate>1967-07-28</BirthDate>
    <LastName>GUILLLOTTE</LastName>
  </Index>
</Student>
<Note>
  <SchoolNoteMessage>test file</SchoolNoteMessage>
</Note>
<FWS>
  <CalendarYear>2023</CalendarYear>
  <FPSTransactionNumber>1</FPSTransactionNumber>
  <Response>
    <ResponseCode>A</ResponseCode>
  </Response>
</FWS>
</Student>
<Response>
  <ResponseCode>S</ResponseCode>
</Response>
</AttendedSchool>
<Response>
  <ResponseFinancialSummary>
    <FinancialAwardType>FWS</FinancialAwardType>
    <CalendarYear>2023</CalendarYear>
    <TotalCount>1</TotalCount>
    <TotalCountAccepted>1</TotalCountAccepted>
```

```
<TotalCountRejected>0</TotalCountRejected>
<TotalCountDuplicate>0</TotalCountDuplicate>
<TotalReportedFunds>1750</TotalReportedFunds>
<TotalFinancialAwardAccepted>1</TotalFinancialAwardAccepted>
</ResponseFinancialSummary>
<ResponseCode>A</ResponseCode>
</Response>
</ReportingSchool>
<Response>
  <DocumentTypeCode>CB</DocumentTypeCode>
  <DocumentStatusCode>A</DocumentStatusCode>
  <ProcessDate>2023-07-20</ProcessDate>
</Response>
</CBCommonRecord>
```

## Section 3

# Campus-Based Common Record Layout

This Chapter provides the Campus-Based Record layout table, which lists the valid tags that can be used in the new Campus-Based (CB) Common Record XML Schema version 1.0b as well as their valid values. Additionally, this section provides standards for the physical layout of the CB Common Record XML Document file. Standards on the physical layout of the CB Common Record XML Document file are required to ensure all systems transmitting or processing an instance of the file can do so without encountering physical constraint errors.

This section will also assist Schools, EdExpress Users, Third-Party Servicers, and Software Providers with implementing the Campus Based Common Record Schema for Federal Work Study (“FWS”) and Federal Supplemental Educational Opportunity Grant (“FSEOG”) Programs.

**Note:** The FSEOG Program updates as part of this Campus-Based (CB) Common Record Schema is for future use.

## Introduction

This section provides the CB Common Record layout table, which lists block information grouped according to the following column headings:

- **Field Number** - Lists the CB Common Record field number
- **CB Data Field** – Contains the CB Common Record 2023 tag name (Schema version 1.0b) and a description
- **Minimum Length** – Specifies the minimum length of the element
- **Maximum Length** – Specifies the maximum length of the element
- **Nullable** – Specifies whether or not the tag is nullable
- **Data Type** – Specifies the type of field (e.g. date, integer, string, boolean, etc.)
- **Field Type** – Specifies whether the field is a simple or complex element
- **Complex Element Sequence** – Specifies in which complex element and what order the tag is required to be submitted

For example: <TotalFWSEarnings> (4th element) means that the tag is the 4th possible tag in the FWS award block.

It may not always be the 4th tag submitted, depending on whether the tags above it are required or optional but the tag will always come after tags 1, 2, and 3 and before any tags listed as 5 or higher.

- **Valid Schema Values** – Describes the acceptable content for a given CB Common Record element in order to pass XML schema validation
- **Business Rules** – Describes the acceptable content for a given CB Common Record element in order to pass various business rules

A brief note on Required vs. Optional tags in the XSD schema. Next to each complex or simple element in the XSD schema are additional details regarding if the element is required or optional. If minOccurs="0" is next to the element, then that complex or simple element is optional. If minOccurs equal to or greater than one, then the element is required. If minOccurs="0" is not next to the element name, then that complex or simple element is required (also note that it is possible for elements to have maxOccurs="#", in this case the element can only occur the specified number of times per block). For instance, the Transmission Data element can be defined as required and is listed as follows:

```
<xsd:element name="TransmissionData">
```

However, the FWS element is optional:

```
<xsd:element name="FWS" type="campusbased:FWSType" minOccurs="0" maxOccurs="unbounded"/>
```

The FWS complex element is optional; however, if an FWS award is submitted and the block is included, certain elements that pertain to the FWS type are required and some are optional (complex elements within the CB Common Record have similar rules):

```
<xsd:complexType name="FWSType">
```

```
  <xsd:sequence>
```

```
    <xsd:element name="CalendarYear" type="xsd:gYear" minOccurs="1" nillable="true"/>
```

```
    <xsd:element name="AwardYear" type="xsd:gYear" minOccurs="0"/>
```

```
    <xsd:element name="CPSTransactionNumber" minOccurs="1">
```

```
      <xsd:simpleType>
```

```
        <xsd:restriction base="xsd:integer">
```

```
          <xsd:minInclusive value="1"/>
```

```
          <xsd:maxInclusive value="99"/>
```

```
        </xsd:restriction>
```

```
      </xsd:simpleType>
```

```
    </xsd:element>
```

```
  </xsd:sequence>
```

```
</xsd:complexType>
```

The intent of this Technical Reference is to describe the purpose and use of the COD Process and the CB Common Record. XML Standards are not presented here and should be obtained from other sources. The following is a representation of the CB Common Record content, for example, data elements, valid values and maximum field lengths. It does not represent the physical layout of the data transmission. The layout is depicted in a separate document, the XML schema.

Schema Version	Status	Schema Name
1.0a	Active	CBCommonRecord1.0a
1.0b	Active	CBCommonRecord1.0b

Table 9  
Schema Versions with Current Status

Beginning in July 2024, schools that will use the CB Common Record XML schema to report FWS wages for the 2023 calendar year and forward, must use version 1.0b.

The CB Common Record Layout lists elements in block sequence. A general rule regarding sequence of data within blocks, and within complex elements: the start and end data tags and their context must be presented on the XML document within the block's tags or the complex element tags to which they belong. The sequence of the data within that block or element is dictated by the sequence of the data tags presented in the 'Block Sequence' column of this document and further shown in the XML schema. For example, if a complex element has ten simple elements within it, those ten elements must occur in the same sequence as listed numerically below according to their 'Block Sequence' and depicted in the XML schema. If there is any discrepancy between the information presented here and the information presented in the XML schema, the XML Schema should be considered as the correct source for the information.

## Full Schema Enforcement

COD shall perform full CB Common Record Schema validation on all incoming Campus-Based Common Record batches. This full schema enforcement pertains to all valid schema versions as of July 2024. All Campus-Based Common Record batches submitted to COD must follow exactly the CB Common Record XML schema outlined in one of the below documents.

COD XML Schema files are posted on the Knowledge Center website at [COD XML Schema | Library | Knowledge Center](#).

The COD System upgraded to Campus-Based Schema version 1.0b for reporting FWS wages for the 2023 calendar year and forward.

## CHANGES TO RESPONSE BLOCK

The COD System will update <CPSTransactionNumber> to <FPSTransactionNumber> in the Award Block for input and response with schema version 1.0b. This tag will be valid for award years 2023-24 and forward.

The COD System will update <CalendarYear> to be optional in the Response Financial Summary block with schema version 1.0b. This tag will be valid for award years 2023-24 and forward.

## CHANGES TO PERSON IDENTIFIERS BLOCK

The COD System will add new <SSN> to the input and response file in the Person Identifiers block with schema version 1.0b. This tag will be optional and will be valid for award years 2023-24 and forward.

## CHANGES TO BIRTH BLOCK

The COD System will add new <Birth> block to the input and response file with schema version 1.0b. This tag will be optional and will be valid for award years 2023-24 and forward.

The COD System will add new <BirthDate> to the input and response file in the Birth block with schema version 1.0b. This tag will be optional and will be valid for award years 2023-24 and forward.

## CHANGES TO PERSON BLOCK

The COD System will add new <Suffix> to the input and response file in the Person block with schema version 1.0b. This tag will be optional and will be valid for award years 2023-24 and forward.

## Schema Version 1.0b CB Common Record Layout

The COD System implemented Campus-Based Common Record Schema version 1.0b to enable FWS reporting for the 2023 calendar year and forward.



## DOCUMENT INFORMATION

Field #	CB Data Field	Min Length	Max Length	Nullable ?	Data Type	Field Type	Complex Element Sequence	Valid Schema Values	Other COD Rules
1	<CBCommonRecord xmlns=" ">  CB Common Record: The root element for the document.	NA	NA	No	NA	Complex Element with Attribute	1st element in document	<CBCommonRecord xmlns= <a href="http://www.ed.gov/FSA/COD/CAMPUS_BASED/2024/v1.0b">http://www.ed.gov/FSA/COD/CAMPUS_BASED/2024/v1.0b</a>  xmlns:xsi= <a href="http://www.w3.org/2001/XMLSchema-instance">http://www.w3.org/2001/XMLSchema-instance</a>  xsi:schemaLocation="http://www.ed.gov/FSA/COD/CAMPUS_BASED/2024/v1.0b CBCommonRecord1.0b.xsd">	The attribute: "xmlns", and its value:  <a href="http://www.ed.gov/FSA/COD/CAMPUS_BASED/2024/v1.0b">http://www.ed.gov/FSA/COD/CAMPUS_BASED/2024/v1.0b</a> , are together used to indicate the namespace of the elements in the XML document. The namespace convention of COD incorporates the schema version indicator. The version indicator is the "/v1.0b" component of the namespace. When schema updates are made, the version indicator must reflect the update (e.g., "/v1.0b"). This attribute and value are required on all transmissions.  The namespace must be used exactly as it is appears in the Valid Schema Values column.

Field #	CB Data Field	Min Length	Max Length	Nullable ?	Data Type	Field Type	Complex Element Sequence	Valid Schema Values	Other COD Rules
2	<TransmissionData>  TransmissionData: Nested immediately below the CB Common Record element, it contains the DocumentID, CreatedDateTime, Source, Destination, Software, and FullResponseCode	NA	NA	NA	NA	Complex Element	Within <CBCommonRecord> block, 1st element	NA	NA
3	<DocumentID>  Document ID: The Date and Time stamp with the Source Entity ID.	30	30	No	String	Simple Element	Within <TransmissionData> block, 1st element	CCYY-MM-DDTHH:mm:ss.ff999999	Submitting a DocumentID that is already in the system will result in a 003 batch level reject.  Once initial information is submitted to COD, new content cannot overwrite the database.
4	<CreatedDateTime>  Created Date and Time: The Date and Time stamp when the document was created.	22	22	No	Date/Time	Simple Element	Within <TransmissionData> block, 2nd element	CCYY-MM-DDTHH:mm:ss.ff	Submitting a CreatedDateTime that is in the future will result in a 006 batch level reject.  Once initial information is submitted to COD, new content cannot overwrite the database.

Field #	CB Data Field	Min Length	Max Length	Nullable ?	Data Type	Field Type	Complex Element Sequence	Valid Schema Values	Other COD Rules
5	<Source>  Source: This element provides a logical grouping of elements related to Document Information.	NA	NA	NA	NA	Complex Element	Within <TransmissionData> block, 3rd element	NA	Once initial information is submitted to COD, new content cannot overwrite the database.
6	<Destination>  Destination: This element provides a logical grouping of elements related to Document Information.	NA	NA	NA	NA	Complex Element	Within <TransmissionData> block, 4th element	NA	Once initial information is submitted to COD, new content cannot overwrite the database.
7	<Lender> <Guarantor> <School> <ThirdPartyServicer> <COD> <Other>  Complex element containing the Routing ID simple element that identifies data exchange partner.	NA	NA	NA	NA	Complex Element	Within <Destination> block, 1st element Within <Source> block, 1st element	NA	—

Field #	CB Data Field	Min Length	Max Length	Nullable ?	Data Type	Field Type	Complex Element Sequence	Valid Schema Values	Other COD Rules
8	<b>&lt;RoutingID&gt;</b>  Routing ID: Element containing the unique identifier for each data exchange partner. This identifier is used by a translator to produce related identifiers (i.e., OPE ID, etc.)	1	8	No	String	Simple Element	<Lender> 1st element in block  <Guarantor> 1st element in block  <School> 1st element in block <ThirdPartyServicer> 1st element in block <COD> 1st element in block <Other> 1st element in block <ReportingSchool> 1st element in block <AttendedSchool> 1st element in block	1 to 99999999	Must be a valid unique identifier for each data exchange partner.  COD will pad the Routing ID with leading 0's to reach 8 digits.  The Routing ID of COD is 00000001.
9	<b>&lt;Software&gt;</b>  Software: This element provides a logical grouping of elements related to Entity Information.	NA	NA	NA	NA	Complex Element	Within <TransmissionData> block, 5th element	NA	—
10	<b>&lt;SoftwareProvider&gt;</b>  Software Provider: This element indicates the software provider and product.	0	10	Yes	String	Simple Element	Within <Software> block, 1st element	—	Software provider defined

Field #	CB Data Field	Min Length	Max Length	Nullable ?	Data Type	Field Type	Complex Element Sequence	Valid Schema Values	Other COD Rules
11	<SoftwareVersion>  Software Version: This element indicates the software version number.	0	6	Yes	String	Simple Element	Within <Software> block, 2nd element	—	Software version defined
12	<OtherSoftwareProvider>  Other Software Provider: This element indicates the other software provider and product.	0	10	Yes	String	Simple Element	Within <Software> block, 3rd element	—	Other Software provider defined
13	<OtherSoftwareVersion> Other Software Version: This element indicates the other software version number.	0	6	Yes	String	Simple Element	Within <Software> block, 4th element	—	Other Software version defined
14	<FullResponseCode>  Full Response Code: This element provides a code allowing an override on Entity profile concerning the response document.	1	1	No	String	Simple Element	Within <TransmissionData> block, 6th element	Enumerated list, value must be: S or F	Defaults to Standard Response if not included.  S = Standard Response F = Full Response
15	<ReportingSchool>  Reporting School Entity Identification: This element provides a logical grouping of elements related to Entity Information.	NA	NA	NA	NA	Complex Element	Within <CBCCommonRecord> block, 2nd element	NA	Once initial information is submitted to COD, new content cannot overwrite the database.

Table 10  
An em dash or “—” indicates no data

## ENTITY INFORMATION

Field #	CB Data Field	Min Length	Max Length	Nullable ?	Data Type	Field Type	Complex Element Sequence	Valid Schema Values	Other COD Rules
16	<p>&lt;School Financial Summary&gt;</p> <p>School Financial Summary: A complex element. This element provides a logical grouping of elements related to reported summary information.</p>	NA	NA	NA	NA	Complex Element	<p>Within &lt;ReportingSchool&gt; block starting at 2nd element</p> <p>Include extra &lt;SchoolFinancialSummary&gt; blocks for each combination of Award Type / Award Year / Calendar Year</p>	NA	—
17	<p>&lt;FinancialAwardType&gt;</p> <p>Financial Award Type: This element indicates the award type. This tag is listed in the Reported Financial Summary and the Response Financial Summary complex elements.</p>	3	5	No	String	Simple Element	<p>&lt;SchoolFinancialSummary&gt; 1st element in block</p>	<p>Must be one of the following values (enumerated list):</p> <p>FWS</p>	Once initial information is submitted to COD, new content cannot overwrite the database.
18	<p>&lt;CalendarYear&gt;</p> <p>Calendar Year: This element indicates the calendar year corresponding to awards.</p>	4	4	No	Year	Simple Element	<p>&lt;SchoolFinancialSummary&gt; 2nd element in block</p>	CCYY	<p>The CB Common Record calendar year cannot be submitted after the current COD System year.</p> <p>If an FWS Award Type is submitted and the Calendar Year is earlier than 2022, this will result in a 996 award level reject.</p>

Field #	CB Data Field	Min Length	Max Length	Nullable ?	Data Type	Field Type	Complex Element Sequence	Valid Schema Values	Other COD Rules
19	<b>&lt;AwardYear&gt;</b>  Award Year: This element indicates the year corresponding to awards. This tag is listed in the Reported Financial Summary and Response Financial Summary.	4	4	No	Year	Simple Element	<SchoolFinancialSummary> 3rd element in block	CCYY	The CB Common Record Award Year cannot be submitted after the current COD System year.  If an FWS Award Type is submitted and the Award Year is earlier than 2022, this will result in a 996 award level reject.  Last year in cycle is used (i.e., 2023 corresponds to 2022-2023)
20	<b>&lt;TotalCount&gt;</b>  Total Number of Awards: Total number of award tags in this document (can be duplicated). This information is summarized by award type and for FWS awards. This tag is listed in the Reported Financial Summary and the Response Financial Summary complex elements.	1	9	No	Integer	Simple Element	<SchoolFinancialSummary> 4th element in block	0-999999999	Once initial information is submitted to COD, new content cannot overwrite the database.
21	<b>&lt;TotalReportedFunds&gt;</b>  Reported Funds Amount Reported: The total dollar value for awards reported in this document.	1	9	No	Integer	Simple Element	<SchoolFinancialSummary> 5th element in block	0-999999999	Once initial information is submitted to COD, new content cannot overwrite the database.  Amounts will be reported in whole dollars

Field #	CB Data Field	Min Length	Max Length	Nullable ?	Data Type	Field Type	Complex Element Sequence	Valid Schema Values	Other COD Rules
22	<TotalFWSEarnings> This element indicates the total dollar value for all FWS awards reported in this document. This information is summarized by award type and by Calendar Year, if reporting by Calendar Year or by Calendar Year and Award Year if reporting by Award Year for FWS awards.	1	9	No	Integer	Simple Element	<SchoolFinancialSummary> 6th element in block	0-999999999	Once initial confirmation is submitted to COD, new content cannot overwrite the database.  Total FWS Earnings field shall be a required tag, when a FWS award type is submitted  Amounts will be reported in whole dollars
23	<TotalFSEOG> This element indicates the total dollar value for all FSEOG awards reported in this document.	1	9	No	Integer	Simple Element	<SchoolFinancialSummary> 7th element in block	0-999999999	<b>**For Future Use Only**</b>  Once initial confirmation is submitted to COD, new content cannot overwrite the database.  Total FSEOG shall be a required tag, when a FSEOG award type is submitted  Amounts will be reported in whole dollars



Field #	CB Data Field	Min Length	Max Length	Nullable ?	Data Type	Field Type	Complex Element Sequence	Valid Schema Values	Other COD Rules
24	<AttendedSchool>  Attending School Entity Identification: A complex element. This element provides a logical grouping of elements related to Entity Information.	NA	NA	NA	NA	Complex Element	<ReportingSchool> starting after the last <SchoolFinancialSummary> block and continuing until all <AttendedSchool> blocks per <ReportingSchool> have been reported	—	Once initial confirmation is submitted to COD, new content cannot overwrite the database.
25	<RoutingID>  Routing ID: Element containing the unique identifier for each data exchange partner. This identifier is used by a translator to produce related identifiers (i.e., OPE ID, etc.)	1	8	No	String	Simple Element	<AttendedSchool> 1st element in block	1 to 99999999	Must be a valid unique identifier for each data exchange partner.  COD will pad the Routing ID with leading 0's to reach 8 digits.  The Routing ID of COD is 00000001.
26	<Student>  Student: A complex element that provides a logical grouping of elements related to Entity Information.	NA	NA	NA	NA	Complex Element	Within <AttendedSchool> block, 1st element	NA	NA

Table 11

An em dash or “—” indicates no data

## PERSON INFORMATION

Field #	CB Data Field	Min Length	Max Length	Nullable ?	Data Type	Field Type	Complex Element Sequence	Valid Schema Values	Other COD Rules
27	<Index>  Index: This element provides a logical grouping of elements related to indexing information, which includes the SSN, BirthDate and LastName elements.	NA	NA	NA	NA	Complex Element	Within <Student> block, 1st element	NA	NA
28	<PersonIdentifiers>  Person Identifiers: This element provides a logical grouping of elements related to identification information.	NA	NA	NA	NA	Complex Element	<Student> 2nd element in block	NA	NA
29	<SSN>  Social Security Number: The person's current Social Security Number.	7	9	No	String	Simple Element	<Index> 1st element in block <PersonIdentifiers> 1st element in block	Must follow one of the following 3 patterns: XXXXXXXX XXXXXXXX XXXXXXXXXX	Values ranging from 000010001 to 999999999 Values should not be submitted using dashes (-)
30	<SchoolAssignedPersonID>  School Assigned Person ID: This is an institutionally defined identification number for the student.	0	20	Yes	String	Simple Element	<PersonIdentifiers> 2nd element in block	—	Institutionally defined

<b>31</b>	<Birth> Birth: A complex element containing the BirthDate simple element.	NA	NA	NA	NA	Complex Element	<Student> 3rd element in block	NA	NA
<b>32</b>	<BirthDate>  Birth Date: The person's Date of Birth.	10	10	No	Date/Time	Simple Element	<Index> 2nd element in block <Birth> 1st element in block	CCYY-MM-DD	1922-01-01 to 2015-12-31
<b>33</b>	<Name>  Name: This element provides a logical grouping of elements related to name information.	NA	NA	NA	NA	Complex Element	<Student> 4th element in block	NA	NA
<b>34</b>	<FirstName>  First Name: The person's first name. This basic component specifies the name given to a person at birth, baptism, or another naming ceremony, or through legal change.	0	<b>35</b>	Yes	String	Simple Element	<Name> 1st element in block	NA	The valid business rule values are:  Letters (uppercase 'A to Z' and lowercase 'a-z'); Space(s); .(period); '(apostrophe); -(dash); numeric values are not valid.
<b>35</b>	<MiddleName>  Middle Name: The person's middle name. This basic component specifies a person's middle initial.	0	35	Yes	String	Simple Element	<Name> 2nd element in block	—	The valid business rule values are:  Letters (uppercase 'A to Z' and lowercase 'a-z');  numeric values are not valid.

<b>36</b>	<b>&lt;LastName&gt;</b>  Last Name: The person's current Last Name. This tag, in the Name block, can be used to change the stored Last Name. If the content of this tag is different when comparing the Index and Name block, then COD will update the stored value as the value in the Name block.	0	35	Yes	String	Simple Element	<b>&lt;Index&gt;</b> 3rd element in block <b>&lt;Name&gt;</b> 3rd element in block	—	The valid business rule values are:  Letters (uppercase 'A to Z' and lowercase 'a-z'); Space(s); .(period); '(apostrophe); -(dash); numeric values are not valid.
<b>37</b>	<b>&lt;Suffix&gt;</b>  Suffix: The person's current Suffix. This tag in the Name Block can be used to change the stored Suffix. If the content of this tag is different when comparing the Index and Name block, then COD will update the stored value as the value in the Name block.	0	10	Yes	String	Simple Element	<b>&lt;Name&gt;</b> 4 <sup>th</sup> element in block	—	The valid business rule values are:  Uppercase (uppercase 'A-Z' and lowercase 'a-z'; Space(s); blanks; . (period); '(apostrophe); - (dash); Numbers (0-9)
<b>38</b>	<b>&lt;Contacts&gt;</b>  Contacts: This element provides a logical grouping of elements related to contact information.	NA	NA	NA	NA	Complex Element	<b>&lt;Student&gt;</b> 5th element in block	NA	—

<b>39</b>	<b>&lt;PermanentAddress&gt;</b>  Permanent Address: This element provides a logical grouping of elements related to Permanent Address information.	NA	NA	NA	NA	Complex Element	<Contacts> 1st element in block	NA	—
<b>40</b>	<b>&lt;TemporaryAddress&gt;</b>  Temporary Address: This element provides a logical grouping of elements related to Temporary Address information.	NA	NA	NA	NA	Complex Element	<Contacts> 2nd element in block	NA	—
<b>41</b>	<b>&lt;AddressLine&gt;</b>  Address Line: A line of the person's address. There is a maximum occurrence of three address lines for this tag. The sequence of this tag maps to the person's first, second, and third lines of address. This basic component specifies the local delivery information such as street, building number, post office box, or apartment portion of a postal address.	1	40	No	String	Simple Element	<PermanentAddress> 1st element in block <TemporaryAddress> 1st element in block	Maximum of 3 appearances per block for this tag.	The valid business rule values are: 0 to 9 Letters (uppercase 'A to Z' and lowercase 'a-z'); .(Period); '(Apostrophe); -(Dash); ,(Comma); #(Number); @(At); %(Percent or care of); &(Ampersand); /(Slash); Space(s)  COD will strip characters other than the ones listed above.  For accents, COD will attempt to remove an accent from the character first if that results in a valid character, we will store it. If it results in a non-valid character, it will be removed.

<b>42</b>	<b>&lt;City&gt;</b>  City: The student's current resident city.	2	30	No	String	Simple Element	<b>&lt;PermanentAddress&gt;</b> 2nd element in block <b>&lt;TemporaryAddress&gt;</b> 2nd element in block	—	<p>The valid business rule values are: Letters (uppercase 'A to Z' and lowercase 'a-z'); .(Period); '(Apostrophe); -(Dash); ,(Comma); #(Number); @(At); %(Percent or care of); &amp;(Ampersand); /(Slash); Space(s)</p> <p>COD will strip characters other than the ones listed above.</p> <p>For accents, COD will attempt to remove an accent from the character first if that results in a valid character, we will store it. If it results in a non-valid character, it will be removed.</p>
<b>43</b>	<b>&lt;StateProvinceCode&gt;</b>  State/Province Code: The person's State or Province. This tag is required for a Domestic Address	2	2	No	String	Simple Element	<b>&lt;PermanentAddress&gt;</b> 3rd element in block for Domestic Addresses <b>&lt;TemporaryAddress&gt;</b> 3 <sup>rd</sup> element in block for Domestic Addresses	This tag is only used for domestic addresses.	<p>The valid business rule values are:</p> <p>AA, AB, AE, AK, AL, AP, AR, AS, AZ, BC, CA, CO, CT, CZ, DC, DE, FL, FM, GA, GU, HI, IA, ID IL, IN, KS, KY, LA, MA, MB, MD, ME, MH, MI, MN, MO, MP, MS, MT, NB, NC, ND, NE, NF, NH, NJ, NL, NM, NS, NT, NU, NV, NY, OH, OK, ON, OR, PA, PE, PR, PW, QC, RI, SC, SD, SK, TN, TX, UT, VA, VI, VT, WA, WI, WV, WY, YT</p>

<b>44</b>	<b>&lt;PostalCode&gt;</b>  Postal Code: The person's Postal Code (Zip Code).	1	<b>10</b>	No	String	Simple Element	<b>&lt;PermanentAddress&gt;</b> 4th element in block for Domestic Addresses <b>&lt;TemporaryAddress&gt;</b> 4 <sup>th</sup> element in block for Domestic Addresses  <b>&lt;PermanentAddress&gt;</b> 4th element in block for International Addresses <b>&lt;TemporaryAddress&gt;</b> 4 <sup>th</sup> element in block for International Addresses	—	The valid business rule values are: 0 to 9; Uppercase A to Z. Spaces are permitted.  COD will strip characters other than the ones listed above.
<b>45</b>	<b>&lt;StateProvince&gt;</b>  State Province: The person's State Province	2	2	No	String	Simple Element	<b>&lt;PermanentAddress&gt;</b> 5th element in block for International Addresses  <b>&lt;TemporaryAddress&gt;</b> 5th element in block for International Addresses	This tag is only used for foreign addresses.	The valid business rule values are:  AA, AB, AE, AK, AL, AP, AR, AS, AZ, BC, CA, CO, CT, CZ, DC, DE, FL, FM, GA, GU, HI, IA, ID IL, IN, KS, KY, LA, MA, MB, MD, ME, MH, MI, MN, MO, MP, MS, MT, NB, NC, ND, NE, NF, NH, NJ, NL, NM, NS, NT, NU, NV, NY, OH, OK, ON, OR, PA, PE, PR, PW, QC, RI, SC, SD, SK, TN, TX, UT, VA, VI, VT, WA, WI, WV, WY, YT

<b>46</b>	<p>&lt;CountryCode&gt;</p> <p>Country Code: The person's country. This basic component specifies the ISO standard 3166-alpha 2 and is required for international addresses.</p>	2	2	No	String	Single Element	<p>&lt;PermanentAddress&gt; 6th element in block for International Addresses</p> <p>&lt;TemporaryAddress&gt; 6th element in block for International Addresses</p>	This tag is only used for foreign addresses.	<p>Not required for domestic addresses</p> <p>The valid business rule values are:</p> <p>AF, AX, AL, DZ, AS, AD, AO, AI, AQ, AG, AR, AM, AW, AU, AT, AZ, BS, BH, BD, BB, BY, BE, BZ, BJ, BM, BT, BO, BA, BW, BV, BR, IO, BN, BG, BF, BI, KH, CM, CA, CV, KY, CF, TD, CL, CN, CX, CC, CO, KM, CG, CD, CK, CR, CI, HR, CU, CY, CZ, DK, DJ, DM, DO, EC, EG, SV, GQ, ER, EE, ET, FK, FO FJ, FI, FR, GF, PF, TF, GA, GM, GE, DE, GH, GI, GR, GL, GD, GP, GU, GT, GN, GW, GY, HT, HM, VA, HN, HK, HU, IS, IN, ID, IR, IQ, IE, IL, IT, JM, JP, JO, KZ, KE, KI, KP, KR, KW, KG, LA, LV, LB, LS, LR, LY, LI, LT, LU, MO, MK, MG, MW, MY, MV, ML, MT, MH, MQ, MR, MU, YT, MX, FM, MD, MC, MN, MS, MA, MZ, MM, NA, NR, NP, NL, AN, NC, NZ, NI, NE, NG, NU, NF, MP, NO, OM, PK, PW, PS, PA, PG, PY, PE, PH, PN, PL, PT, PR, QA, RE, RO, RU, RS, RW, SH, KN, LC, PM, VC, WS, SM, ST, SA, SN, SC, SL, SG, SK, SI, SB, SO, ZA, GS,</p>
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									ES, LK, SD, SR, SJ, SZ, SE, CH, SY, TW, TJ, TZ, TH, TL, TG, TK, TO, TT, TN, TR, TM, TC, TV, UG, UA, AE, GB, US, UM, UY, UZ, VU, VE, VN, VG, VI, WF, EH, YE, ZM, ZW, GG, IM, JE, ME, BL, MF, BQ, CW, SS, SX, XK
47	<b>&lt;Phone&gt;</b>  Phone: This is a complex element that provides a logical grouping to information related to the phone number.	NA	NA	NA	NA	Complex Element	<Contacts> 3rd element in block	—	—
48	<b>&lt;PhoneNumber&gt;</b>  Phone Number: The person's phone number. There is a maximum occurrence of three phone numbers for this tag; however the COD System only stores the last occurrence of this tag.	7	15	Yes	String	Simple Element	<Phone> 1st element in block	—	Maximum of 3 appearances per block for this tag.
49	<b>&lt;Email&gt;</b>  Email: This is a complex element that provides a logical grouping to information related to the email address.	NA	NA	NA	NA	Complex Element	<Contacts> 4th element in block	NA	—

<b>50</b>	<b>&lt;EmailAddress&gt;</b>  Email Address: The person's email address. This basic component specifies the numbers, letters, and symbols used to identify an electronic mail (e-mail) user within the network to which the person or organization belongs. Follows the format of username@domain.	0	128	Yes	String	Simple Element	<Email> 1st element in block	—	The valid business rule values are: Any valid keyboard character including an underscore; but not the pipe symbol or space. If the field is not blank, an @ and a "." (period) to the right of the @ are required and a valid character must exist prior to the "." (period) and after the "." (period).
<b>51</b>	<b>&lt;Citizenship&gt;</b>  Citizenship: A complex element containing the CitizenshipStatusCode simple element	NA	NA	NA	NA	Complex Element	<Student> 6th element in block	NA	—
<b>52</b>	<b>&lt;CitizenshipStatusCode&gt;</b>  Citizenship Status: The person's citizenship status. COD will pull student citizenship status from CPS.	1	1	Yes	String	Simple Element	<Citizenship> 1st element in block	—	For all award programs, this value must be equal to either 1 or 2.  Note: COD will pull this value from CPS for all award types.  Value definitions for tag:  1 = U.S. Citizen (or U.S. national) 2 = Eligible noncitizen 3 = Not eligible

<b>53</b>	<b>&lt;Note&gt;</b>  Note: This complex element contains the School Note Message simple element	NA	NA	NA	NA	Complex Element	<Student> 7th element in block	NA	—
<b>54</b>	<b>&lt;SchoolNoteMessage&gt;</b>  School Note Message: This tag contains cross-reference information useful to the School.	0	20	Yes	String	Simple Element	<Note> 1st element in block	—	Institutionally defined.

Table 12  
An em dash or “—” indicates no data

## AWARD INFORMATION

Field #	COD Data Field	Min Length	Max Length	Nullable ?	Data Type	Field Type	Complex Element Sequence	Valid Schema Values	Other COD Rules
55	<FWS>  FWS Award Level block will house the award level information pertaining to student FWS awards	NA	NA	NA	NA	Complex Element	<Student> 8th element in block	NA	FWS Award Block is present if FWS awards have been submitted
56	<CalendarYear>  Calendar Year: This element indicates the calendar year corresponding to a given student's FWS award.	4	4	Yes	Year	Simple Element	<FWS> 1st element in block	CCYY	The CB Common Record calendar year cannot be submitted after the current COD System Year.  If an FWS Award Type is submitted and the Calendar Year is earlier than 2022 or after 2023, this will result in a 996 award level reject.
57	<AwardYear>  Award Year: This element indicates the financial award year corresponding to this particular FWS award.	4	4	No	Year	Simple Element	<FWS> 2nd element in block	CCYY	The CB Common Record Award Year cannot be submitted after the current COD System Year.  If an FWS Award Type is submitted and the Award Year is earlier than 2022 or after 2024, this will result in a 996 award level reject.  Last year in cycle is used (i.e., 2023 corresponds to 2022-2023)

Field #	COD Data Field	Min Length	Max Length	Nullable ?	Data Type	Field Type	Complex Element Sequence	Valid Schema Values	Other COD Rules
58	<FPSTransactionNumber>  FPS Transaction Number: Transaction number from eligible ISIR used to calculate award.	1	2	No	Integer	Simple Element	<FWS> 3rd element in block	Value must be between 1 - 99	—
59	<TotalFWSEarnings>  This element indicates the total dollar value for all FWS awards reported for this student.	1	9	No	Integer	Simple Element	<FWS> 4th element in block	0-999999999	Amounts will be reported in whole dollars
60	<EarningPeriodStartDate>  This element will report the FWS earning period start date.	0	10	Yes	Date	Simple Element	<FWS> 5th element in block	CCYY-MM-DD	**For Future Use Only**
61	<EarningPeriodEndDate>  This element will report the FWS earning period end date.	0	10	Yes	Date	Simple Element	<FWS> 6th element in block	CCYY-MM-DD	**For Future Use Only**
62	<FederalShareAmount>  The Federal Share Amount field represents the Federal portion of a disbursement amount.	1	9	Yes	Integer	Simple Element	<FWS> 7th element in block	0-999999999	**For Future Use Only**  Amounts will be reported in whole dollars

Field #	COD Data Field	Min Length	Max Length	Nullable ?	Data Type	Field Type	Complex Element Sequence	Valid Schema Values	Other COD Rules
63	<InstitutionalShareAmount>  The Institutional Share Amount field represents the Entity portion of a disbursement amount.	1	9	Yes	Integer	Simple Element	<FWS> 8th element in block	0-999999999	<b>**For Future Use Only**</b>  Amounts will be reported in whole dollars
64	<FWSCategory>	0	4	Yes	String	Simple Element	<FWS> 9th element in block	Enumerated List: ONCP = On campus OFCN = Off-campus non-profit OFNF = Off-campus non-profit / 90% fed share OFCP = Off-campus for-profit	<b>**For Future Use Only**</b>
65	<FWSPositionType>	0	2	Yes	String	Simple Element	<FWS> 10th element in block	Enumerated List: RT = Reading tutor/family literacy MT = Math tutor CE = Civic Education	<b>**For Future Use Only**</b>

Field #	COD Data Field	Min Length	Max Length	Nullable ?	Data Type	Field Type	Complex Element Sequence	Valid Schema Values	Other COD Rules
66	<FedSharePercentage>	1	3	Yes	Integer	Simple Element	<FWS> 11th element in block	Acceptable Value Range:  0 to 100  The percentage sign will be displayed as part of the frontend	<b>**For Future Use Only**</b>  Business Rules shall be employed to ensure that the Fed Share Percentage is limited to the following valid percentage values: <ul style="list-style-type: none"> <li>• 50</li> <li>• 75</li> <li>• 90</li> <li>• 100</li> </ul> If the Fed Share Percentage submitted does not fall under the valid percentage, it will result in a 996 award level reject.
67	<CommunityServiceIndicator>  Community Service Indicator is the indicator for whether or not the position is classified as community service.	1	1	Yes	Boolean	Simple Element	<FWS> 12th element in block	true/false	<b>**For Future Use Only**</b>
68	<JLDIndicator>  JLD Indicator is the Job Location Development Indicator.	1	1	Yes	Boolean	Simple Element	<FWS> 13th element in block	true/false	<b>**For Future Use Only**</b>

Field #	COD Data Field	Min Length	Max Length	Nullable ?	Data Type	Field Type	Complex Element Sequence	Valid Schema Values	Other COD Rules
69	<DisasterIndicator>  The field indicates whether or not a student has been impacted by a Disaster designation	1	1	Yes	Boolean	Simple Element	<FWS> 14th element in block	true/false	**For Future Use Only**
70	<FSEOG>	NA	NA	NA	NA	Complex Element	<Student> 8th element in block	NA	** For Future Use Only. If submitted will be ignored by COD**  FSEOG Award Block is present if FSEOG awards have been submitted
71	<AwardYear>  Award Year: This element indicates the financial award year corresponding to this particular FSEOG award.	4	4	Yes	Year	Simple Element	<FSEOG> 1st element in block	CCYY	** For Future Use Only. If submitted will be ignored by COD**  The CB Common Record Award Year cannot be submitted after the current COD System Year.  If an FSEOG Award Type is submitted and the Award Year is earlier than 2022, this will result in a 996 award level reject.
72	<FPSTransactionNumber>  FPS Transaction Number: Transaction number from eligible ISIR used to calculate award.	1	2	No	Integer	Simple Element	<FSEOG> 2nd element in block	Value must be between 1 - 99	** For Future Use Only. If submitted will be ignored by COD**



Field #	COD Data Field	Min Length	Max Length	Nullable ?	Data Type	Field Type	Complex Element Sequence	Valid Schema Values	Other COD Rules
73	<TotalFSEOG>  This element indicates the total dollar value for all FSEOG awards reported in this document.	0	9	Yes	Integer	Simple Element	<FSEOG> 3rd element in block	0 - 999999999	** For Future Use Only. If submitted will be ignored by COD**
74	<InstitutionalShareAmount>  The Institutional Share Amount field represents the School's portion of a disbursement amount.	0	9	Yes	Integer	Simple Element	<FSEOG> 4th element in block	0 - 999999999	**For Future Use Only. If submitted will be ignored by COD**
75	<SourceInstitutionalShare>  The source of funding for the school's share of disbursement amount	1	2	Yes	String	Simple Element	<FSEOG> 5th element in block	—	**For Future Use Only. If submitted will be ignored by COD**
76	<FederalShareAmount>  The Federal Share Amount field represents the Federal portion of a disbursement amount.	0	9	Yes	Integer	Simple Element	<FSEOG> 6th element in block	0 - 999999999	**For Future Use Only. If submitted will be ignored by COD**
77	<DisasterIndicator>  The field indicates whether or not a student has been impacted by a Disaster designation	NA	NA	Yes	Boolean	Simple Element	<FSEOG> 7th element in block	true/false	**For Future Use Only. If submitted will be ignored by COD**

Table 13  
An em dash or “—” indicates no data

## Response Information

Field #	CB Data Field	Min Length	Max Length	Nullable ?	Data Type	Field Type	Complex Element Sequence	Valid Schema Values	Other COD Rules
78	<Response>  Response: This element provides a logical grouping of elements related to COD System's processing of the submitted record	NA	NA	NA	NA	Complex Element	Utilized at various levels of the schema	NA	NA
79	<ResponseCode>  Response indicator: The result of processing the record on COD.	1	1	No	String	Simple Element	<Response> 1 <sup>st</sup> element in block	Enumerated value list, value must be:  A or R	Value definitions for tag:  A = Accepted R = Rejected
80	<EditProcessResult>  Edit Process Result: A complex element. This element provides a logical grouping of elements related to the edit response information.	NA	NA	NA	NA	Complex Element	<Response> block, 4th element	—	—
81	<ResponseErrorCode>  Response Error Code: Edit result from COD processing.	1	3	No	String	Simple Element	<EditProcessResult> 1st element in block	—	—
82	<ResponseMessage>  Response Message: The text of the edit result. This field is transmitted only via web applications.	0	150	Yes	String	Simple Element	<EditProcessResult> 2nd element in block	—	—

Field #	CB Data Field	Min Length	Max Length	Nullable ?	Data Type	Field Type	Complex Element Sequence	Valid Schema Values	Other COD Rules
83	<ResponseErrorField>  Response Error Field: This tag referenced by the Edit Code.	0	200	No	String	Simple Element	<EditProcessResult> 3rd element in block	—	—
84	<ReportedValue>  Reported Value: The value reported by the school in the tag contained in the <ResponseErrorField> tag.	0	150	Yes	String	Simple Element	<EditProcessResult> 4th element in block	—	—
85	<ResponseFinancialSummary>  This element provides a logical grouping of elements related to summary information.	NA	NA	NA	NA	Complex Element	<i>Reporting School</i> Within <Response> block, 1st element in block	—	—
86	<FinancialAwardType>  This element indicates the award type. This tag is listed in the Reported Financial Summary and the Response Financial Summary complex elements.	3	5	No	String	Simple Element	<ResponseFinancialSummary> 1st element in block	Must be one of the following values (enumerated list): FWS	—

Field #	CB Data Field	Min Length	Max Length	Nullable ?	Data Type	Field Type	Complex Element Sequence	Valid Schema Values	Other COD Rules
87	<CalendarYear>  This element indicates the calendar year corresponding to awards. This tag is listed in the Reported Financial Summary and Response Financial Summary.	4	4	No	Year	Simple Element	<ResponseFinancialSummary> 2nd element in block	CCYY	—
88	<AwardYear>  This element indicates the year corresponding to awards. This tag is listed in the Reported Financial Summary and Response Financial Summary.	4	4	No	Year	Simple Element	Reporting School  <ResponseFinancialSummary> 3rd element in block	CCYY	—
89	<TotalCount>  Total number of award tags in this document (can be duplicated). This information is summarized by award type and by award year. This tag is listed in the Reported Financial Summary and the Response Financial Summary complex elements.	0	9	No	Integer	Simple Element	Reporting School <ResponseFinancialSummary> 4th element in block	0-999999999	—

Field #	CB Data Field	Min Length	Max Length	Nullable ?	Data Type	Field Type	Complex Element Sequence	Valid Schema Values	Other COD Rules
90	<TotalCountAccepted>  Total number of accepted awards in this document. This information is summarized by award type and by award year.	0	9	No	Integer	Simple Element	Reporting School  <ResponseFinancialSummary> 5th element in block	0-999999999	—
91	<TotalCountRejected>  Total number of rejected awards in this document. This information is summarized by award type by award year.	0	9	No	Integer	Simple Element	Reporting School  <ResponseFinancialSummary> 6th element in block	0-999999999	—
92	<TotalCountDuplicate>  Total number of duplicate awards in this document. This information is summarized by award type by award year.	0	9	No	Integer	Simple Element	Reporting School  <ResponseFinancialSummary> 7th element in block	0-999999999	—
93	<TotalReportedFunds>  Reported Funds Amount Reported: The total dollar value for awards reported in this document. This information is summarized by award type by award year. This tag is listed in Reported Financial Summary and the Response Financial Summary complex elements.	0	9	No	Integer	Simple Element	Reporting School  <ResponseFinancialSummary> 8th element in block	0-999999999	Amounts will be reported in whole dollars

Field #	CB Data Field	Min Length	Max Length	Nullable ?	Data Type	Field Type	Complex Element Sequence	Valid Schema Values	Other COD Rules
94	<DocumentTypeCode>  Document Type Code: This element indicates the code corresponding to the type of data being returned in the document.	2	2	No	String	Simple Element	<i>CB Common Record</i>  Within <Response> block, 1 <sup>st</sup> element	—	Value Definitions for tag:  CB = Campus-Based Common Record Response  WB = Campus-Based Web-Initiated Response
95	<DocumentStatusCode>  The status of the processed document on COD.	1	1	No	String	Simple Element	Within <Response> block,  2nd element	Enumerated value list, value must be: A or R	Value definitions for tag:  A = Accepted R = Rejected
96	<ProcessDate>  The date the document information was processed at COD.	10	10	No	Date	Simple Element	Within <Response> block,  3rd element	Formatting restricted to CCYY-MM-DD	—

Table 14  
An em dash or “—” indicates no data

## Campus-based Common Record Physical Layout

This section provides standards for the physical layout of the Campus Based Record XML Document file. Standards on the physical layout of the Campus Based Record XML Document file are required to ensure all systems transmitting or processing an instance of the file can do so without encountering physical constraint errors.

Examples of physical constraint errors include exceeding available memory, exceeding available disk space, or exceeding available network bandwidth (and timing out). While most physical constraint errors can be avoided by proper coding techniques on the host system, there are some error conditions best handled through the definition of, and adherence to, a set of well-defined and well-publicized standards. Such error conditions and their corresponding standards for resolution are provided in this section.

XML and its associated technologies, (XML Schema, Document Type Definitions), do not provide for a mechanism to define the physical layout of a file. In fact, XML does not depend on the physical layout of the elements by design. White space and line lengths are not relevant to the logical construction and reading of an XML document. Therefore, the CB Common Record XML file physical layout standards are defined as guidelines and examples presented in this Section.

## Line Length Limitations

### **32-kilobyte Line Length Limitation on Mainframe System**

Some mainframe systems cannot create or read a line longer than 32 kilobytes. A line consists of a string of data with an “end of line marker.” The phrase “end of line marker” in this document refers to whatever mechanism is used on a platform to terminate an individual line or record. For example, an end of line marker can be set by the writing out of a record (on a mainframe), by inserting a `<CB><LF>` character sequence (on a PC), or by inserting a `<CB>` character (on UNIX). `<CB>` (carriage return character) and `<LF>` (linefeed) are ASCII codes 13 and 10, respectively.

Systems with this limitation cannot handle a string of data longer than 32 kilobytes without encountering some type of data corruption (most likely truncation). By rule, XML ignores white space, which includes tabs, linefeeds, and carriage returns. Since XML has no means to regulate line lengths, a separate standard must be set to ensure lines do not exceed 32 kilobytes.

### **9,999-byte Line Length Limitation on COD System**

The COD System cannot process documents that contain over 9,999 bytes per line. A line consists of a string of data with an “end of line marker.” The phrase “end of line marker” in this document refers to whatever mechanism is used on a platform to terminate an individual line or record. For example, an end of line marker can be set by the writing out of a record (on a mainframe), by inserting a `<CB><LF>` character sequence (on a PC), or by inserting a `<CB>` character (on UNIX). `<CB>` (carriage return character) and `<LF>` (linefeed) are ASCII codes 13 and 10, respectively. COD will not process or acknowledge CB Common Record Documents that are submitted with a string of data greater than 4,000 bytes.

### **Line Length Limitation Solution**

The solution, in its general form, is to make sure an end of line marker is always set before a particular output stream of data reaches 9,999 bytes. This end of line marker should be created in the format native to the system where the file is being created.

The data transmission software used by COD and by participating schools handles the translation of end of line markers across platforms. For example, if a file were sent from a PC to a UNIX box, the `<CB><LF>` character sequence would be automatically changed to `<CB>` characters. Therefore, the insertion of an end of line marker does not have to take into consideration the platform of the destination system. This same principle holds true between mainframes (EBCDIC or ASCII), PCs and UNIX boxes.

## Standard

The following standard is a strongly recommended approach for schools and vendors who want to guarantee their files will not exceed the 9,999 byte limitation. If a school or vendor can ensure their submitted files will not exceed the 9,999 byte limitation by some other means, those files will be accepted by COD. However, the burden of responsibility will then rest with the school or vendor for files incorrectly submitted.

In order to ensure no line grows larger than 9,999 bytes, all Campus Based Record XML files submitted to COD should be constructed with end of line markers inserted at specified points in the document. These points are tied to specific elements in the XML document. The points are:

- After the AttendedSchool element opening tag, `<AttendedSchool>`
- After every Student element closing tag, `</Student>`
- Before beginning an "Award" element opening tag, which could be `<FWS>`, `<FSEOG>`, and the opening tags of all other elements designated as part of the Award substitution group in the CB Common Record XML Schema specification

The CB Common Record XML Schema has been evaluated to confirm that if the above standard is maintained, the maximum size of the data sent in any one of these lines will never exceed 9,999 bytes. The maximum line size takes into account all tags, all maximum data lengths for each element, and all maximum numbers of repetitions of nested data elements.

The following example found is a skeleton submission file correctly formatted according to the end of line marker standards. In this example, for clarity, sub-elements are not listed, and the characters, [EOL], end of line, explicitly mark the end of a line.

COD guarantees the Response Document files it produces will not contain lines longer than 9,999 bytes, but the files will not necessarily match the line breaks as specified for submissions. This is due in part to the additional space used by the Response blocks.

## Coding Guidelines

The code should track the CB Common Record elements as they are written to the output stream and write out a line of XML text (via the appropriate end of line marker) as any of the EOL points are encountered. Code to construct the CB Common Record can vary greatly depending on the platform, libraries, and languages used, so specific examples are not provided.



```
<CBCommonRecord><!--All CB Common Record sub elements -->  
<ReportingSchool><AttendedSchool> [EOL]  
<Student><!--All Student sub elements until an Award is encountered-->[EOL]  
<FWS><!--All FWS sub elements --> </FWS>[EOL]  
<FSEOG><!--All FSEOG sub elements --> </FSEOG>[EOL]  
</Student><Student>[EOL]  
</AttendedSchool></ReportingSchool></CommonRecord>[EOL]
```

# Section 4:

## Message Classes

The Message Class table describes the message classes that are to be used for sending and receiving data using the Campus-Based Schema within the COD System. Message classes that end in an IN are for documents exported from a school system to the COD System. Message classes that end in an OP are for documents imported to a school system from the COD System.

## Campus-Based Common Record Message Classes

The Campus-Based Common Record Message Class tables describe the message classes that are used when sending and receiving Common Record documents to and from the COD System.

Users are able to choose the message class in which they send and receive documents to and from the COD System. Message class options include the following:

- Non-program specific and non-award year specific. Example: `CRCBMYIN`, `CRCBMYOP`
  - Non-program specific and award year specific (2022-2023 and 2023-2024).

Schools do not need to use all the message classes listed in the table below. Use of these message classes will vary by school based on the schools' business processes and system software. For school-initiated Common Records, schools can specify message class options when submitting documents. The COD System will return document responses in the `OP` message class that corresponds to the `IN` message class used to submit the document to the CB Schema within the COD System.

- If reporting for the FWS program using the Calendar Year reporting method, select the message class corresponding to the Award Year the student was paid on. For example, 23 for the 2022-2023 Award Year or 24 for the 2023-2024 Award Year.
- If reporting for the FWS program using the Calendar Year reporting method and the student has awards in both Award Years, select the message class corresponding to the highest Award Year the student was paid on. For example, for the 2023 Calendar Year, the Award Years included are 2022-2023 and 2023-2024. Use 24 for the corresponding message class in this case.
- If reporting for the FWS program using the Calendar and Award Year reporting method, select the year corresponding to the award year. For example, 23 for the 2022-2023 Award Year or 24 for the 2023-2024 Award Year.
- All CBWB responses will be sent using `YY = 24`.

Schools will not be locked into a specific message class upon initial document submission. Instead, schools will be able to change message classes with each document submission to the COD System.

The COD System has only one Campus-Based system generated web message class (`CBWB24OP`). This response is generated for any FWS awards or maintenance to FWS awards submitted via the COD Website

The COD System will not validate the content of the CB Common Record document with the message class type used for submission. For example, schools can submit FWS data for the 2023-2024 Award Year in the non-award year specific message class, `CRCBMYIN`. The document will be processed by the COD System and the response will be returned in the corresponding `OP` message class `CRCBMYOP`. If the document content does not correspond to the `IN` message class used for submission, the COD System will not determine the appropriate content specific message class in which to return the document

response. Message class specificity is merely a mechanism that schools can use to differentiate between documents they have submitted to the COD System.

## Message Classes

### NON-PROGRAM SPECIFIC

#### NON-PROGRAM SPECIFIC, NON-AWARD YEAR SPECIFIC

Message Class	Data Description	Destination Mailbox
CRCBMYIN	Campus Based Record Documents containing data from any or multiple programs for any or multiple award years sent from school to COD System.	To: TG71900
CRCBMYOP	1. Responses containing data from any or multiple programs for any or multiple award years sent from COD System	From: TG71900

Table 15

#### NON-PROGRAM SPECIFIC, AWARD YEAR SPECIFIC

Message Class	Data Description	Destination Mailbox
CRCB23IN	Campus Based Record Documents containing data from any or multiple programs for the 2022-2023 Award Year send from school to COD System.	To: TG71900
CRCB23OP	Responses containing data from any or multiple programs for the 2022-2023 Award Year sent from the COD System to school.	From: TG71900
CRCB24IN	Campus Based Record Documents containing data from any or multiple programs for the 2023-2024 Award Year send from school to COD System.	To: TG71900
CRCB24OP	Responses containing data from any or multiple programs for the 2023-2024 Award Year sent from the COD System to school.	From: TG71900
CBWB24OP	Web responses containing data from any or multiple programs for wither 2022-2023 or 2023-2024 Award Year sent from the COD System.	From: TG71900

Table 16

# Section 5:

## Edits

For more information regarding the business rules that govern the logic supporting these edits, please refer to the Response Documents and Response Codes topics of Volume 4, Section 1 – Implementation Guide

For all Campus-Based Common Records received and processed by the COD System, the COD System returns a Response document indicating the status of Campus-Based Common Record processing, including any rejected data elements and reasons for rejection. The rejection reasons are indicated in the response through a series of Edit codes, which are described in further detail throughout this section.

## Introduction

This section provides the Edits table, which lists COD system edit information grouped according to the following column headings:

- Number – Edit Number
- Edit Type – May be one of the following:
  - R (Reject)
- Message – The Edit message
- Condition – The logical conditions that must be satisfied in order to trigger the edit
- Award Type Affected – The FWS program is impacted by the edit

How to Fix Record – Instructions on how to update and resubmit the record properly to avoid triggering the edit

If you have any questions regarding the information contained in this document, please contact the FSA Partner and School Relations Center at the following phone number:

- FSA Partner and School Relations Center 1-800-848-0978

Staff is available Monday through Friday, 8am-11pm Eastern Time. Or, please email FSA School Partner and School Relations Center at [codsupport@ed.gov](mailto:codsupport@ed.gov).

For more information regarding the business rules that govern the logic supporting these edits, please refer to the Response Documents and Response Codes topics of Volume 4, Section 4 – Edits.

CB Schema Edits No.	Edit Type	Block	Message	Condition	Award Types Affected	How to Fix Record
001	R	Document	Invalid Destination Mailbox ID	The Entity ID is invalid or not assigned to send FWS and FSEOG data from that Destination Mailbox.	FWS	Resubmit data using the appropriate Destination Mailbox ID.
002	R	Award	Reporting Entity ID is not found in the COD System	Reporting School Entity ID is not eligible to report.	FWS	Resubmit using appropriate reporting school entity ID.
003	R	Document	Duplicate Document ID	Document ID has been previously submitted.	FWS	Review document to determine if duplicate. If not, resubmit with unique Document ID number.
004	R	Document	Entity ID (Source) Not Found On Participant File	The Entity ID submitted does not match any existing Entity ID on file at COD.	FWS	Verify your Source Entity ID. For further clarification, if needed, call your Customer Service Representative.
006	R	Document	Document Create Date Greater Than Current System Date	The date indicated in the Date/Time stamp in the Document ID is greater than the current system date at COD.	FWS	Correct Document (Batch) ID Create Date Time and resubmit.
007	R	Document	No Detail Records In Document	The Document (Batch) contained no detail records and cannot be processed.	FWS	Resubmit Document (Batch) with detail records.



CB Schema Edits No.	Edit Type	Block	Message	Condition	Award Types Affected	How to Fix Record
011	R	Award	Reported FPS Transaction Number Does Not Match FPS	This condition applies to NEW students and NEW awards. A NEW Student is defined as a student whose SSN does not already exist in COD. A new award is submitted for a new student, AND the combination of SSN and DOB does not match ANY Transaction Number on FPS for that award year	FWS	Compare SSN and Date of Birth combination reported in the Common Record to the same data elements on the student's ISIR based on the reported FPS Transaction Number. If any of these identifiers do not match, resubmit with the corrected data.
012	R	Award	Reported FPS Transaction Number Does Not Match FPS	This condition applies to EXISTING students and EXISTING awards. An EXISTING Student is defined as a student whose SSN does not already exist in COD. A new award is submitted for a new student, AND the combination of SSN and DOB does not match ANY Transaction Number on FPS for that award year  NOTE: Applicable for all award years for FWS.	FWS	Compare SSN and Date of Birth combination reported in the Common Record to the same data elements on the student's ISIR based on the reported FPS Transaction Number. If any of these identifiers do not match, resubmit with the corrected data.
014	R	Student	Citizenship Status is not eligible for this award	The student citizenship tag was sent with a value not equal to 1 or 2.  OR  The student citizenship tag was not sent and FPS does not have a valid Citizenship Status code stored.	FWS	Update student citizenship to a valid value.
020	R	Student	First and Last Name Blank	First Name and Last Name are both blank.	FWS	Submit first name, last name or both.

CB Schema Edits No.	Edit Type	Block	Message	Condition	Award Types Affected	How to Fix Record
021	R	Student	Address is Incomplete	<p>A complete address is defined as when at least one occurrence of each of the following is present:</p> <p>AddressLine</p> <p>City</p> <p>StateProvinceCode</p> <p>PostalCode</p> <p>CountryCode (only required for foreign addresses)</p> <p>For FWS: The student's address is incomplete on the incoming record, on FPS, and in the COD database.</p>	FWS	If rejected, update and resubmit address information

CB Schema Edits No.	Edit Type	Block	Message	Condition	Award Types Affected	How to Fix Record
024	R	Award	Reported FPS Transaction Number Does Not Match FPS	<p>There are three separate conditions that would return this edit.</p> <p>This edit applies to NEW students and NEW awards. A NEW student is defined as a student whose SSN does not already exist in COD System.</p> <p>A NEW award is submitted for a NEW student, AND the combination of SSN, and DOB (FWS only) does not match that SPECIFIC Transaction Number on FPS for that award year.</p> <p>This edit applies to EXISTING students with a NEW award. An EXISTING student is defined as a student whose SSN already exists in the COD System.</p> <p>A NEW award is submitted for an EXISTING student, AND the combination of SSN and DOB (FWS only) does not match that SPECIFIC Transaction Number on FPS for that award year.</p> <p>An FPS Transaction number change is submitted for an EXISTING student and award, AND the submitted Transaction number does not exist in CPS for that student.</p>	FWS	<p>Compare SSN and Date of Birth combination reported in the Common Record to the same data elements on the student's ISIR based on the reported FPS Transaction Number. If any of these identifiers do not match, resubmit with the corrected data.</p> <p>Review the Reported Transaction Number and ensure that you have an ISIR record on file for the student with that transaction number. If incorrect, update the Reported Transaction Number and resubmit.</p>

CB Schema Edits No.	Edit Type	Block	Message	Condition	Award Types Affected	How to Fix Record
034	R	Award	Attended School Entity Identifier has no relationship with the Reporting School Entity Identifier	The Attended School Entity Identifier has no established relationship to the Reporting School Entity Identifier in the Entity Block.	FWS	Verify the Attended Entity ID and the Reporting Entity ID. If incorrect, update and resubmit
100	R	Award	Sender does not have reporting permission for the School identified in the Reporting School Entity ID.	Destination Mailbox Number ID (TG Number) does not have reporting permission for the School identified in the Reporting School Entity ID.	FWS	Verify your School Entity ID.
210	R	Document	Invalid Schema	The incoming file has failed full and partial Campus-Based Common Record XML schema validation. The batch and its information have not been processed into the COD system. XML errors must be fixed and resubmitted using a new document batch ID.	FWS	Review the CB Common Record Schema and resubmit.
218	R	Document	Software Provider and/or Software Version is missing	The Software Provider and/or Software Version was not submitted.	FWS	Update record as appropriate and Resubmit

CB Schema Edits No.	Edit Type	Block	Message	Condition	Award Types Affected	How to Fix Record
300	R	Award	New FWS Award Submitted using Different Calendar Year or Award Year Reporting Method than Previously Accepted	<p>An FWS award was previously accepted by the COD System using the Calendar Year reporting method, and an additional award for the same student and Calendar Year is being reported using the Award Year and Calendar Year reporting method.</p> <p>OR</p> <p>An FWS award was previously accepted by the COD System using the Award Year and Calendar Year reporting method, and an additional award for the same student and Calendar Year is being reported using the Calendar Year reporting method.</p>	FWS	Review submission and resubmit using the correct reporting method.
301	R	Award	Award Received After the End of the FAFSA Processing Year	The FWS award was submitted after the end of the FAFSA processing year for the associated Calendar Year.	FWS	No action required.
994	R	General	Missing Value:	Content was not submitted for a required field.	FWS	Review the Format and Valid Values cell corresponding to the rejected tag. Update record as appropriate and resubmit.
996	R	General	Invalid Value	<p>The content submitted did not conform to valid values according to COD Business Rules.</p> <p>The content has not been loaded to COD.</p>	FWS	Review the Format and Valid Values corresponding to the rejected tag. Update record as appropriate and resubmit

CB Schema Edits No.	Edit Type	Block	Message	Condition	Award Types Affected	How to Fix Record
998	R	General	Invalid Format	The content submitted did not conform to the valid format according to COD Business Rules.  The content has not been loaded to COD.	FWS	Review the Format and Valid Values corresponding to the rejected tag. Update record as appropriate and resubmit.

Table 17

# Section 6:

## Campus-Based School Testing Guide

## Introduction

The Campus-Based School Testing Guide is intended for all Schools in the COD System.

## Purpose

The purpose of CB Common Record School testing is to provide schools, third-party servicers, and software vendors an opportunity to test FWS award business processes and system software with the COD System prior to the transmission and processing of actual production data. CB Common Record School testing will enable simpler, faster, and less costly issue identification and resolution in a low-volume, controlled test environment. It will also allow schools, third-party servicers, and software vendors the opportunity to make corrections or enhancements to software applications and processes prior to entering the “live” production environment. The goal of CB Common Record School Testing is to make the transmission of production data smoother and reduce the risk of production problems.

Throughout the following sections, the term “Schools” is used to indicate any entity that is participating in CB Common Record School Testing and includes Schools as well as entities that process on behalf of Schools (such as third-party servicers and software vendors).



## Scope

CB Common Record School Testing is divided into two distinct phases of testing for the upcoming award year. The testing environment will be updated with new code in conjunction with the next major release of COD.

- Phase 1 – CB Common Record Manual Verification
- Phase 2 – Structured Application Testing

Each phase is described in more detail later in this document.

CB Common Record School Testing is available to all entities that participate in the COD process. Schools, vendors, or third-party servicers are not required to test with COD but are encouraged to participate in Phase 1 testing. Schools, vendors, or third-party servicers should refer to the *CB Common Record School Test Cases* document in the following section for more information. The test case document contains descriptions of the test data that schools, vendors, or third-party servicers will send to and from COD, test execution guidelines, and structured test cases with multiple testing cycles.

Schools that use software from a software vendor and/or use a third-party servicer do not need to test with COD. The software vendors and third-party servicers can complete the test on behalf of their customers.

All entities that wish to participate in CB Common Record School Testing must submit a formal sign-up document to the FSA Partner and School Relations Center. The sign-up document is located at the end of this section.

It is the School's choice as to how much of the test process they want to complete. But a previous test phase must be completed before moving on to the next. (Example: Schools wishing to test to Phase 2 must first complete Phase 1)

# Test Phase Descriptions

## PHASE 1 - COMMON RECORD MANUAL VERIFICATION

### 1. What is the purpose of Phase 1 testing?

The purpose of the CB Common Record Manual Verification testing is to ensure that the schools, vendors, or third-party servicer's XML CB Common Record is well formed and properly structured according to the rules of the 1.0b XML CB Common Record Schema. The 1.0b schema documentation is available on the Knowledge Center website at:

<https://fsapartners.ed.gov/knowledge-center/library/campus-based-xml-schema/2024-03-14/campus-based-xml-schema-version-10b>

This site also has direct links to the 1.0b schema XML code, the valid ranges XML code, and the change log. The COD team manually reviews a CB Common Record document emailed to the FSA Partner and School Relations Center ([CODSupport@ed.gov](mailto:CODSupport@ed.gov)) by the schools, vendors, or third-party servicers and assists the school, vendor or third-party servicer in the identification of potential updates to their CB Common Record submissions. This testing does not validate the data submitted within the CB Common Record. For this phase of testing, only two student records should be sent in the CB Common Record.

### 2. Who should participate?

The CB Common Record Manual Verification phase of testing is available to all schools, vendors, or third-party servicers.

### 3. When does Phase 1 testing take place?

Phase 1 testing is available from May 13, 2024 to November 17, 2024. Phase 1 testing is required for all schools, vendors, or third-party servicers prior to participating in Phase 2 testing.

### 4. How do Schools, Vendors or Third-Party Servicers sign up for Phase 1 testing?

Schools, vendors, or third-party servicers must complete a sign-up document in order to participate and schedule a testing window with the FSA Partner and School Relations Center. The sign-up document is located at the end of this guide and on the COD web site, <https://cod.ed.gov> under the "COD Resources" link. The completed document must be emailed to [CODSupport@ed.gov](mailto:CODSupport@ed.gov), Subject: "Campus-Based School Testing Sign-up", or faxed to the FSA Partner and School Relations Center, 1-877-623-5082.

### 5. What do Schools, Vendors, or Third-Party Servicers need to do when they complete Phase 1 testing?

Schools, vendors, or third-party servicers that have completed Phase 1 and would like to continue to Phase 2 testing must contact their COD School Testing Coordinator at FSA Partner and School Relations Center to schedule a Phase 2 testing start date. A second sign-up document is not required to participate in Phase 2 testing.



## PHASE 2 – STRUCTURED APPLICATION TESTING

### 1. What is the purpose of Phase 2 Testing?

The purpose of Phase 2-Structured Application Testing is to ensure that schools, vendors, or third-party servicers can send, receive, and process batches of records using specific input instructions with detailed expected results issued by COD. Schools, vendors, or third-party servicers use a test ISIR file supplied by COD that creates a test data set of students to use with the structured test cases. Schools, vendors, and third-party servicers cannot create their own student data to submit files during Phase 2 testing.

During this phase, schools, vendors, or third-party servicers send CB Common Record documents to, and receive CB Common Record Response documents back from the COD School Testing mailbox. Schools, vendors, or third-party servicers must verify that these files can be loaded and processed correctly in their system.

### 2. Who should participate?

All schools, vendors, or third-party servicers that have completed Phase 1 (Manual Verification) testing. Phase 2 is for schools who want to submit test common records for actual processing in the School Test environment. This would also allow Schools to test bringing in the response file they would get back from COD. Phase 2 testing assists schools, vendors, or third-party servicers in the identification of potential updates to their system before beginning actual processing for Calendar Year 2023.

### 3. When does Phase 2 testing take place?

Phase 2 is available from July 15, 2024 to December 15, 2024. If schools, vendors, or third-party servicers complete Phase 1 prior to July 15, 2024 they must wait until the Phase 2 testing window opens.

### 4. How do Schools, Vendors or Third-Party Servicers sign up for Phase 2 testing?

When schools, vendors, or third-party servicers sign up for testing, they can select their desired test phases on the Sign-Up Document. If not selected during initial submission schools, vendors, or third-party servicers that want to continue to Phase 2 testing after completing Phase 1 can contact their Testing Coordinator at FSA Partner and School Relations Center. A second sign-up document is not required to participate in Phase 2 testing.

### 5. What do Schools, Vendors or Third-Party Servicers need to do when they complete Phase 2 testing?

Schools, vendors or third-party servicers should notify their FSA Partner and School Relations Testing Coordinator when they have completed testing. If a schools, vendors, or third-party servicer has shown no testing activity over a two-week period, COD will assume your school, vendors, or third-party servicer has completed Phase 2 of testing, unless you have notified COD otherwise.

### 6. What do Schools, Vendors or Third-Party Servicers need to do when they are ready to submit their first “live” batch?

If Schools, vendors, or third-party servicers finish their School Test efforts with Phase 2, they should notify their COD School Testing Coordinator prior to submitting their first “live” batch into the production environment. The School Testing team will ensure the batch processes successfully, and notify the school, vendor or third-party servicer of the results.

## Testing Criteria

### TEST ENTRY CRITERIA

In order to begin testing with schools, vendors or third-party servicers need to complete the following steps:

- Complete a CB Common Record School Testing sign-up document (located at the end of this section). Upon completion, it should be submitted to the FSA Partner and School Relations Center no later than October 27, 2024.
- Schedule individual testing date(s) specific for your School(s) for each testing phase. FSA Partner and School Relations will contact you after the sign-up document is received.
- Be aware of your school's COD Entity ID and other program IDs. If you are a school, vendor or third-party servicer without a COD Entity ID simply request Entity IDs for testing.
- Confirm your test plans and COD readiness. Contact FSA Partner and School Relations when you are ready to submit.
- Install the latest version of the message class table from SAIG.
- Install and implement the latest updates to the software applications.
- Develop a means of keeping testing data separated from production environment.
- Identify individuals at the school, vendor, or third-party servicer responsible for completing the COD School Testing process and exchange names with COD School Testing team.
- Complete Phase 1 CB Common Record Manual Verification Testing, prior to beginning Phase 2 Structure Application Testing.

Vendors can test using a COD Entity ID for one of their Schools, or the FSA Partner and School Relations Center can provide one for them to use for testing purposes only.

## TEST EXIT CRITERIA

The School and the FSA Partner and School Relations Center should jointly determine when the school, vendor, and third-party servicer have successfully completed CB Common Record School testing. The school, vendor, and third-party servicer can select which processes to test and should continue testing until expected results are received. Once the expected results are received the school can consider testing successful. There is no pre-defined “end” of the test other than the published end dates for each phase of CB Common Record School Testing.

A school, vendor and third-party servicer is considered to have completed testing with COD once any of the following steps are completed:

- It has been determined that the school, vendor, and third-party servicer has been able to satisfactorily complete the desired test scenarios by achieving the expected results.
- School, vendor, and third-party servicer has chosen to discontinue school testing prior to completing all the desired test scenarios if the expected results have been achieved.
- School, vendor, and third-party servicer has contacted the FSA Partner and School Relations Center to verify the test results.
- School, vendor, and third-party servicer has successfully sent a “live” batch into the COD Production environment.
- Testing phase window closes prior to test completion by School.

## TESTING COMPLETION CLEAN UP

In order to begin the production phase, all test data **MUST** be removed from the participating school, vendor or third-party servicer systems. Before submission of production data, schools, vendors, and third-party servicers should also ensure that files are sent using the proper production message classes and production destination mailbox.

## Test Data

The Test Data section explains test data requirements for Phase 2-Structure Application Testing. More detail about the test cases can be found in the CB Test Cases document located in *CB Test Cases* document of the *2024-2025 COD Technical Reference*.

### CAMPUS-BASED COMMON RECORD TEST DATA

COD provides an actual CPS test data ISIR file for all test phases to each participating school, vendor, and third-party servicer via email in an attached Zip file. Each school, vendor and third-party servicer processes the *ISIR data that COD provides and generates student award transactions using its normal awarding process. Schools, vendors, and third-party servicers are required to send this file to COD using the normal SAIG processing protocols except for using the CB Common Record School Testing message classes and the CB Common Record School Testing destination mailbox located in the CB Schema Test Cases document.*

*Upon receiving a CB Common Record in XML format, the COD System performs an immediate check to determine if the CB Common Record is readable. If the CB Common Record is readable and complies with the XML schema the COD System processes the file. COD will reject any unreadable record with Edit 210. After the COD System confirms the CB Common Record is readable and complies with the XML schema, the COD System classifies the record to determine how it will be processed. Schema 1.0b CB Common Records will be processed with full validation enforced. School Test will expect Schools to submit schema 1.0b CB Common Records. Once the data has been processed, schools, vendors and third-party servicers will receive a response file indicating the results of each record submitted. If a record rejects, the response file indicates which data element(s) have rejected. Rejected records can then be corrected and resubmitted.*

When processing records within the COD test environment the anticipated time from record submission to Response file is approximately two hours during any business day. Batches submitted during the weekend or federal holidays may not be processed until 7:30am ET of the next business day. If a school, vendor, or third-party servicer has not received a response within the above time frame of submitting the test file they should contact their School Testing Coordinator at the FSA Partner and School Relations Center.

## Testing Message Classes

Campus-Based Common Record message classes are year specific and are to be used from year to year in the production environment. However, different test message classes must be used for testing. During Phase 2 Structured Application Testing, Schools must use the following message classes when sending in Common Records for testing:

### CB COMMON RECORD TEST MESSAGE CLASSES

Campus Based Record Document sent from School to COD	CBTESTIN
Responses sent from COD to School	CBTESTOP

Table 18: CB Common Record Test Message Classes



## School Testing Sign-Up Process

Schools, vendors, and third-party servicers register for COD testing by completing the sign-up document located at the end of this School Testing Guide and submitting it to the FSA Partner and School Relations Center. Once the FSA Partner and School Relations Center has received the sign-up document from the School, a confirmation letter will be sent to the School, via email, verifying that their sign-up document was received. Once the sign-up document has been processed, the FSA Partner and School Relations Center will send the School a Readiness letter, via email, to provide additional information needed to begin testing such as the testing Entity ID Number to be used by the school, vendor or third-party servicer, the assigned testing start date, and the name of the School Testing Coordinator assigned to the school, vendor or third-party servicer. A new readiness letter will be sent to the school, via email, for each specified phase of testing.

The FSA Partner and School Relations Center can be contacted by:

- Phone: 1-800-848-0978
- Fax: 1-877-623-5082

When calling, ask for COD School Testing Support, or send email to [CODSupport@ed.gov](mailto:CODSupport@ed.gov) with the subject line "COD School Testing Support".

Upon receipt of the sign-up document, the COD team must complete a considerable setup process to establish the School in the COD test environment before testing can begin. Schools should take this setup process into account when planning to participate in CB Common Record School Testing and provide enough lead-time in their schedule.

## CONTACT NAMES

Each School participating in COD testing notifies the FSA Partner and School Relations Center of their designated contact person on the testing sign-up document. The contact person should be consistent for the period before, during, and upon completion of the test. This person should be a technically oriented staff member who is very knowledgeable about the School's financial aid system. This person should be available to assist in problem analysis and to coordinate any follow-up tests that may be required. If a school uses a third-party servicer and the servicer is conducting the test on behalf of the school, the FSA Partner and School Relations Center needs the name and telephone number of the servicer contact person.

## SCHEDULING

The School Testing sign-up document must be completed and emailed or faxed to the FSA Partner and School Relations Center by the appropriate deadline shown below:

- The deadline to sign up for CB Schema Testing is October 27, 2024.

When a School submits their School Testing sign-up document, the School is contacted by the FSA Partner and School Relations Center to schedule testing dates within each phase of testing.

## SUPPORT SERVICES

While a school, vendor or third-party servicer are going through testing, there are many support sources available for assistance, as listed below:

### School Support Services

Support Service	For Information on the Following:	Contact
School Testing Sign Up	Registering for School Testing	Contact FSA Partner and School Relations Center
ISIR Data Issues	Problems with ISIR data only	Contact FSA Partner and School Relations Center
ISIR Processing Issue	Problems with processing the ISIR file	Contact FPS/SAIG Technical Support 1-800-330-5947
SAIG	Issues concerning connectivity to SAIG only	Contact FPS/SAIG Technical Support 1-800-330-5947
CB Processing	Issues concerning all items related to Campus-Based processing only.	Contact FSA Partner and School Relations Center 1-800-848-0978
School Testing Issues	Issues concerning all items related to COD School Testing only.	Contact FSA Partner and School Relations Center 1-800-848-0978
School Testing Results	To obtain or report School Testing results for COD School Structured Testing only.	Contact FSA Partner and School Relations Center 1-800-848-0978

Table 19: School Support Services

# Resource Planning

## HARDWARE/SOFTWARE

Schools should have all hardware and software capabilities ready before testing. Each School should have all latest upgrades installed from vendors or regulatory releases.

## ROLES AND RESPONSIBILITIES

A collaborative effort between participating schools, vendors and third-party servicers and the FSA Partner and School Relations Center is necessary for School testing to be completed successfully. The expected roles and responsibilities of each entity are described below:

## SCHOOLS, VENDORS, AND THIRD-PARTY SERVICERS

Schools, vendors, and third-party servicers are responsible for completing the following steps associated with CB Common Record School Testing:

- In addition to this school testing section review relevant Electronic Announcements posted on the Knowledge Center web site.
- Review the CB Implementation Guide and CB Common Record Layout in the Campus-Based Processing Technical Reference.
- Review all documentation that is emailed to the participating School (if applicable).
- Schedule testing date with the FSA Partner and School Relations Center using the sign-up document (preferably returned via email).
- Prepare a test environment for CB Common Record School Testing that uses the test destination mailbox, test message classes, and the test Entity ID.
- Prepare test data to execute the Structured CB Common Record School Testing scripts for submissions.
- Send the test data to COD via the SAIG.
- Retrieve Responses from COD via the SAIG.
- Process Responses/acknowledgements.
- Communicate results with the FSA Partner and School Relations Center.
- Once testing is completed, remove all data from the school, vendor or third-party servicer environment.

**Protecting Personally Identifiable Information**

Do not use real student data or production data during any phase of testing. Utilize only the student data provided in the ISIR provided by COD.

## FSA PARTNER AND SCHOOL RELATIONS CENTER

The FSA Partner and School Relations Center provides the following support during testing:

- Provide and process COD School Testing sign-up documents.
- Schedule specific test dates for schools, vendors, and third-party servicers.
- Provide schools, vendors, and third-party servicers with their own testing Entity ID to use only during a specific testing phase (if needed).
- Process submitted data.
- Send Responses via the SAIG.
- Update schools, vendors, and third-party servicers of their testing status.
- Assist with issue identification and resolution.
- Provide testing technical guidance.

## Preparing for School Testing

Schools, vendors, and third-party servicers that participated in Common Record School Testing for the 2023-2024 provided COD with feedback on their experience. The following sections provide you with insight as to what schools, vendors and third-party servicers should test, how to prepare and, and how to schedule testing within your institution.

### SHOULD I PARTICIPATE IN SCHOOL TESTING?

- All software vendors, third-party servicers and schools that use a homegrown or mainframe system are encouraged to test their software with the COD System prior to submitting production data.
- FSA ensures that EDEExpress is extensively tested each year with COD prior to its annual release(s) to the schools. Schools using EDEExpress software do not need to test with the COD System.
- Schools that use a software vendor product do not need to test with the COD System, since most software vendors test with COD on their school's behalf. This will help minimize the need for schools to retest with COD.
- New schools to Title IV Financial Aid, that are not using EDEExpress or another software vendor product, are also encouraged to test with COD.

### HOW DO I PREPARE FOR SCHOOL TESTING?

Before you begin testing, schools should:

- Establish a separate testing environment to keep production data separate from their testing data. Production operations of prior award years and CB Common Record School Testing need to be able to occur in parallel without interference.
- Compare test output files against the CB Common Record Layout and XML Examples published in the 2024-2025 Campus-Based Processing Technical Reference Volume 4 Section 1.
- Signup for testing in advance to allow for adequate setup time before you are ready to begin testing. COD has considerable work to do to set-up each testing participant to ensure a successful test.
- Identify a strategy for loading the provided fictitious test students several weeks prior to Phase 1 testing. The easiest way to enter the test data is that Schools can process the simulated FPS ISIR file provided (via email) by COD. Schools can also manually enter the fictitious test students into their testing environment reading from the simulated FPS ISIR file.
- Review the Implementation Guide in the Campus-Based Processing Technical Reference and understand the COD process for FWS.

## WHAT CAN I EXPECT DURING SCHOOL TESTING?

- Plan to test and start early in the testing window. DO NOT wait until the end of the testing window to sign-up or begin testing. Allow and plan time for retesting with the COD system.
- Plan and allow time to encounter possible issues and errors and expect time delays during the resolution process.
- Schools should be very careful to send test files to the correct SAIG mailbox and to use the correct SAIG testing message classes to avoid accidentally submitting test data to the COD production environment. SAIG has two networks. One is Production (Prod), and the other one is Test (ProdT). You will need to send your files to TG75891 mailbox in the Test network. Schools that use EDConnect should ensure that they select the correct test message class (usually CBTESTIN) and not the production message class.
- Proactively contact your testing coordinator to help resolve issues, provide testing status, and answer questions during the testing process. Schools may experience delays in the testing process while issues are identified, researched, and resolved.
- Communicate to the FSA Partner and School Relations Center when the School has satisfactorily completed school testing or chooses to discontinue school testing.

## CAMPUS-BASED SCHOOL TESTING SIGN-UP DOCUMENT

On the following page you will find the CB Common Record School Testing sign-up document. This document should be completed to the best of your ability upon submission. The completed document should be sent to the FSA Partner and School Relations Center.

Send the completed document to FSA Partner and School Relations at:

- Email: [CODSupport@ed.gov](mailto:CODSupport@ed.gov), subject of “Campus-Based School Testing Sign-up”
- Fax: 1-877-623-5082

Definitions of terms in the sign-up document and what information should be contained in them are listed below.

Field Name	Description
COD Entity ID	Enter your Entity ID here. If you are unaware of your Entity ID you can find this information on the COD web site, <a href="http://cod.ed.gov">cod.ed.gov</a> , or contact the FSA Partner and School Relations Center. Third-party servicers or software vendors who have tested in any previous year can enter the same ID they were given in the previous testing year. If a Servicer/Vendor has lost the information from previous years testing or if they have never tested before, please reach out to the FSA Partner and School Relations Center and an ID will be provided.
Date Submitted	The date you submitted this form to the FSA Partner and School Relations Center.
Organization	If you are a third-party servicer or software vendor list your name here. Schools can also put their name here as well as in the School Name field below.
Organization Type	Indicate if you are a school, software vendor, or third-party servicer.
Test Readiness Date	The date when you will be ready to begin the COD School Testing process.
Desired Test Phase	Select the phase(s) of testing that you want to complete. Please keep in mind that you must complete each phase in order.
Hardware Setup	Please indicate what kind of physical system you are using (a mainframe system or a server/workstation-based system).
Software Product	If you are using a software vendor product or third-party service provider, you use to submit records to COD enter the vendor product/software name. If you are using a self-made custom solution, please enter “Custom:” and the name of you’ve given your software.
Contact Information (Name, Phone, E-mail)	Enter the contact information of the people who will be working with the FSA Partner and School Relations Center and COD School Testing personnel.
School Name	If you are a School enter your name here. If you are a third-party servicer or software vendor testing through a school, then enter that school’s name here. If you are a third-party servicer or a software vendor testing directly with COD, then leave this field blank.

Field Name	Description
Reporting School Entity ID	Enter the COD Entity ID of the School that will be submitting the records to COD. For most schools this will be the same as COD Entity ID above.
Attending School Entity ID	Enter the COD Entity ID of the School where students attend class. (This is usually the same as the COD Entity ID too.)
OPE ID	Enter the OPE ID of the School where students attend class.
SAIG Test Mailbox	Enter the SAIG Test mailbox ID (TGxxxxx) of the test mailbox you will be transmitting your test files from during testing.
Third Party Servicer	Enter the Entity ID of the Third-Party Servicer if the school is using one here.
Case ID	This field is only used by the FSA Partner and School Relations Center.

Table 20: Sign-up Document Definitions





## Campus-Based School Testing Summer 2024 Sign-Up Document

Complete and send to [CODSupport@ed.gov](mailto:CODSupport@ed.gov) or Fax to 1-877-623-5082.

Upon completion, it should be submitted to the FSA Partner and School Relations Center no later than October 27, 2024.

Allow 7-10 business days for the sign-up and set-up processes prior to testing.

Allow sufficient time for re-testing to meet your specific testing needs.

Organization Information	COD Entity ID:	Date Submitted:
Organization:		
Organization Type: School ( ) Vendor ( ) 3 <sup>rd</sup> Party Servicer ( )		Test Readiness Date:

Test Information	Desired Test Phases: 1. Manual Verification ( ) 2. Structured ( )	
Programs Tested: FWS ( )		Hardware Setup: Mainframe ( ) Server/Workstation ( )
Software Product:		

Primary Contact	Name:	Phone #: ( ) -
Email:		

Alternate Contact	Name:	Phone #: ( ) -
Email:		

School Information	List each school only once. If testing with a school system list main campus first.		
School Name:			
Reporting School Entity ID:	Attending School Entity ID:	OPE ID:	

SAIG Test Mailbox: TG
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If sending/simulating batches through a third-party servicer enter the Entity ID for the servicer here:
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School Name:
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Reporting School Entity ID:
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Attended School Entity ID:
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OPE ID:
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SAIG Test Mailbox: TG
-----------------------

If sending/simulating batches through a third-party servicer enter the Entity ID for the servicer here:
---

School Name:
--------------

Reporting School Entity ID:
-----------------------------

Attended School Entity ID:
----------------------------

OPE ID:
---------

SAIG Test Mailbox: TG
-----------------------

If sending/simulating batches through a third-party servicer enter the Entity ID for the servicer here:
---

Case IDs assigned:
--------------------

# Section 7:

## Campus-Based Test Cases

## Test Data Sent from the Schools to the COD System

This section provides an overview of the records schools send to COD during the School Testing process. Each type of record and its general functionality are described. General test conditions are also discussed.

### CAMPUS-BASED COMMON RECORD

The Campus-Based Common Origination process utilizes one single record across programs for originations. Schools use the CB Common Record, which is comprised of CB common data elements, definitions, edits, and structure for FWS and FSEOG awards. Although the record has the same layout for all programs, not all data elements are required for each transmission or for each program. This record layout relies on a technology called Extensible Markup Language (XML) to encode documents into machine-readable code.

For School Testing the CB Common Record is submitted using the message class `CBTESTIN`.

Upon receiving a CB Common Record in XML format, the COD System performs an immediate check to determine if the CB Common Record is readable. If the CB Common Record is readable and complies with the XML schema, the COD System will process the file. Records that are not readable nor comply with the XML schema will be rejected with Edit 210.

After the COD System confirms the CB Common Record is readable and complies with the XML schema the COD System classifies the record to determine how it will be processed. The record is classified as either a new record or an update record.

School Testing for the 2023 calendar year will only involve the CB Common Record 1.0b schema. During the testing process schools can submit data for the 2023 calendar year.

### ESTABLISHING A NEW RECORD

A new record establishes a new student or award on the COD System. There are two types of new records:

- **New Student with a New Award** - If the student identifier does not match any previously submitted to the COD System the record is considered a new student. A student cannot be established on the COD database until an award is accepted for the student.
- **New Award** - If the student identifier matches a person already established on the COD System the system checks to determine if the award is already on file. If not, then the record is considered a new award.

## ESTABLISHING A CHANGE RECORD

A change record performs an update to information or elements that were previously established on the COD System. There are two types of update records:

- Change Record – A change record performs an update to an award data element that was previously established by a new record including the Total FWS Earnings values or the FPS Transaction Number of an existing award.

After the CB Common Record is processed the COD System returns a Response to the school. For School Testing the Response is returned using the message class `CBTESTOP`.

Testing with the predefined test data covers scenarios for three students including:

- New Students with a New FWS Award with only the calendar year included
- New Students with a New FWS Award with the calendar year and award year included
- Change Records

The CB Common Record layout is provided in the Volume 4, Section 2 – CB Common Record Layout of this technical reference.

## Test Data Received by the Schools from COD

This section provides an overview of the different record types that are received by a school from COD during the test process.

### CB COMMON RECORD RESPONSE

The CB Common Record Response is sent back to the school after processing is complete. Schools have the option of selecting either a standard or full CB Common Record Response. A full Response contains all the data elements that were in the original CB Common Record sent by the school and the rejected data elements and reason codes. A standard Response contains only the rejected data elements and error reason codes. It is recommended that full Responses be used during this testing process. Test Responses are sent using the message classes `CBTESTOP`.

## Test Execution

In this section record profiles are provided for each test case. Use these test scripts in conjunction with the *Volume 4, Section 1 – Campus-Based Common Record Layout*. Specific data are defined and step-by-step instructions for executing the test are provided. Below is a checklist of the major steps in the testing process.

Please note that CB Common Record Manual Verification is a required test phase for all schools that participate in School Testing.

### CAMPUS-BASED COMMON RECORD MANUAL VERIFICATION

The purpose of the CB Common Record Manual Verification testing is to ensure that the school's XML CB Common Record is well formed and properly structured according to the rules of the XML CB Common Record Schema. The COD team manually reviews a CB Common Record document sent by the school and assists the school in the identification of potential updates to their CB Common Record submissions. This testing does not validate the data submitted within the CB Common Record. For this phase of testing only two student records should be sent in the CB Common Record.

### CAMPUS-BASED COMMON RECORD MANUAL VERIFICATION CHECKLIST

Step	Task	Task Completed
1	Schedule test dates with the FSA Partner and School Relations Center for XML CB Common Record Manual Verification Testing (Phase 1).	—
2	Schools should use the test cases included in this document for the XML Campus-Based Common Record Manual Verification testing.  This test data, after it has passed the XML structure verification, can be used in system testing and eliminate the need for the school to create more test data.  DO NOT send real SSN, name, and/or address combinations. This is in respect to the Privacy Act of 1974.	—
3	Schools should e-mail CB Common Record data to FSA Partner and School Relations Center. (E-mail address to be provided upon sign-up for testing).	—
4	Schools will receive the results of the XML CB Common Record Manual Verification via e-mail. The results will include a list of errors and actions that need to be taken by the school to correct the data. It may also include a corrected file for the school to use as a reference for making corrections. Some potential errors are file size errors, missing tags and unused tags.	—
5	Repeat steps 2-4 until test data passes XML CB Common Record Manual Verification.	—

Table 21: CB Common Record Manual Verification List  
An em dash or “—” indicates no data.

## STRUCTURED APPLICATION TESTING

The purpose of the Structured Application Testing is to ensure that schools can send, receive, and process batches of records using detailed input instructions with detailed expected results issued by COD. Schools use a test Institutional Student Information Record (ISIR) file supplied by COD that creates a test data set of students to use with the structured test cases. During this phase Schools send CB Common Record documents to COD and receive CB Common Record Response documents back from COD. This phase of testing is not all-inclusive; it is meant only to ensure schools can send, receive and process records with detailed expected results.

The submission of all test cases is not required to participate in Structured Testing. Schools are encouraged to use the test cases which are supported by their software. The test cases are meant as a guide to submit records. Schools may submit programs within individual or combined batches. This is to allow schools the option of submitting several batches in each test cycle due to software limitations or organizational setup.

Please note that Structured Application Testing can begin only after successful completion of the CB Common Record Manual Verification Testing.

## STRUCTURED APPLICATION TESTING CHECKLIST

Step	Task	Task Completed
1	Prepare a test environment using a Test Destination Mailbox, Test message classes (CBTESTIN), School Entity ID, and specified COD forward system date.	—
2	Schedule test dates with the FSA Partner and School Relations Center for Structured Application Testing (Phase 2).	—
3	Prepare the test data (received from COD) for Test Cycle 1 using the School Test Entity ID.	—
4	Send the test document to COD school testing SAIG test mailbox (TG75891).	—
5	Once file has been sent verify that the file has been received via SAIG portal and notify FSA Partner and School Relations Center that the file has been sent.	—
6	If the file was not received by SAIG contact SAIG customer service at either (800) 330-5947 or <a href="mailto:CPSSAIG@ed.gov">CPSSAIG@ed.gov</a> .	—
7	If Response is not received within two (2) hours contact FSA Partner and School Relations Center for an update.	—
8	Receive notification from the FSA Partner and School Relations Center that the Response are on the SAIG. Pull the Response into the school's system.	—
9	Validate Response documents against the published expected.	—
10	Call the FSA Partner and School Relations Center to confirm results before proceeding.	—
11	Repeat steps 4 through 8 for Test Cycle 2.	—



Step	Task	Task Completed
12	Receive notification from the FSA Partner and School Relations Center that the testing cycle is complete.	—
13	<p>If a test environment was not used, reset the school's system defaults for production, and verify that the test data is deleted, or all test awards are adjusted to \$0.</p> <p>Note: If system is not reset to the defaults, it may cause errors in the production data. Remember to change the school test environment system date back to the correct current date.</p>	—

Table 22: Structured Application Testing Checklist  
An em dash or “—” indicates no data.

## TEST STUDENT PROFILES

### Case #1: Student Testone earns a Federal Work Study award

Student Testone is a student who earned an FWS award. The first submission contains the CB Common Record person and award with only the `Calendar Year = 2023`. The student is reported to have earned FWS wages of \$1,000.

The second submission includes a decrease in the FWS earnings to \$750.

### Case #2: Student Testtwo earns a Federal Work Study award

Student Testtwo is a student receiving multiple FWS awards. The first submission contains two records containing the CB Common Record person and award data.

The first record contains the `Calendar Year = 2023` and `Award Year = '22-'23`. The student earned an FWS award of \$524.

The second record contains the `Calendar Year = 2023` and `Award Year = '23-'24`. The student earned an FWS award of \$600.

The second submission contains the CB Common Record person and award data with the `Calendar Year = 2023` and `Award Year = '22-'23`. The student's FWS earnings are corrected from \$524 to \$624.

## CREATING UNIQUE SOCIAL SECURITY NUMBERS

Because there are many schools participating in Campus-Based Schema Schools Test, COD provides test data that aids in the identification of its school and test cases. To do this the following two-point formula is used to generate a Social Security Number (SSN) for the school test data.

First Point: Five digits from the school's OPE ID (positions 2 through 6) are used as the first five numbers of each SSN. For example, if a school OPE ID is 07777800 and the test data defines an SSN of ###-##-0001, the SSN would translate to 777-78-0001.

Second Point: The last digit of each student and borrower SSN indicates which Test Case that individual belongs to during Structured Testing. So, going by the example above, Student 777-78-0001 belongs to Test Case 1.

Furthermore, other than the SSN, the data (Name, Date of Birth, Address. etc.) for each Student within each Test Case is the same. The 6<sup>th</sup>, 7<sup>th</sup>, and 8<sup>th</sup> digits of the SSN are merely used to differentiate one Student/Borrower from another. So, continuing with the above example, Students 777-78-0001, 777-78-0011, 777-78-0021, 777-78-0031, and 777-78-0041 belong to Test Case 1 and their Names, Dates of Birth, Address, etc. are all the same. Only the SSN differentiates them.

These students will already be created for you and sent via e-mail. The last four digits of the SSNs may vary from the below matrix, but the FSA Partner and School Relations Center will provide this information prior to testing.

## STUDENT PROFILE MATRIX

Student Number	Award Type	Student SSN	First Submission	Second Submission
1 (Send)	FWS	###-##-0001	FWS Campus-Based Record with Calendar Year	Update to previously accepted FWS Campus-Based Record with Calendar Year
1 (Receive)	FWS	###-##-0001	Response	Response
2 (Send)	FWS	###-##-0002	FWS Campus-Based record with an award year and with a Calendar Year	Update to previously accepted FWS Campus-Based record with an award year and with a Calendar Year
2 (Receive)	FWS	###-##-0002	Response	Response

Table 23: Student Profile Matrix

## Preparing the Test Environment

It is necessary to define separate, independent regions for the school test and production data. Before proceeding with testing verify that the method defined is valid and that any test data created does not mix with live production data within the school's environment. The school test environment must have the ability to modify the system processing date.

### SETTING SYSTEM DEFAULTS

For the Testing Process any defaults in a school's system should be set as follows:

#### Entity ID

- Contact the FSA Partner and School Relations Center for this information prior to testing.

#### For FWS

- Calendar Year = 2023

### FIRST TEST CYCLE (FIRST SUBMISSION)

In the first test cycle a school submits CB Common Records in XML format for up to two students as well as create new awards for the FWS program.

- One student with FWS (Calendar Year only)
- One student with FWS (Calendar Year and Award Year)

Once the awards are in XML CB Common Record format create one file (batch) to be sent to COD:

### FIRST TEST CYCLE TO COD IN XML FORMAT

File Description	Message Class	Maximum Number of Students in Batch
CB Common Record Documents	CBTESTIN	2

Table 24: First Test Cycle to COD in XML Format

COD processes the files, and the school receives two files from COD in return:

### FIRST TEST CYCLE RESPONSES FROM COD

File Description	Message Class	Maximum Number of Students in Batch
CB Common Record Responses	CBTESTOP	2

Table 25: First Test Cycle Responses from COD

## SECOND TEST CYCLE (SECOND SUBMISSION)

In the second test cycle a school submits CB Common Records in XML format for up to two students to update existing awards for the FWS program.

- One student with FWS (Calendar Year only)
- One student with FWS (Calendar Year and Award Year)

Once the awards are in XML CB Common Record format create one file (batch) to be sent to COD:

## SECOND TEST CYCLE TO COD IN XML FORMAT

File Description	Message Class	Maximum Number of Students in Batch
CB Common Record Documents	CBTESTIN	2

Table 26: Second Test Cycle to COD in XML Format

COD processes the files, and the school receives two files from COD in return:

## SECOND TEST CYCLE RESPONSES FROM COD

File Description	Message Class	Maximum Number of Students in Batch
CB Common Record Responses	CBTESTOP	2

Table 27: Second Test Cycle Responses from COD

## HELPFUL HINTS FOR PREPARING TEST CASE INPUT FILES AND RECEIVING COD RESPONSES

When XML errors and rejection edits occur after an input file is entered into the COD system these errors typically result because the input file contains errors. Many of these errors can be avoided before an input file is submitted. Common input errors include (but not limited to):

- Extra spaces (blanks) contained in some places of the XML file. As a result, the system does not accept the file as having the correct XML format and rejects the file. An example is a blank line between the <Version> and <CBCommonRecord> lines. Also, spaces in certain parts of an XML file counts as a value when the file processes through the COD system.
- Personal Information of the Student– Examples: Switching the SSN of Borrower and Student, incorrect SSN of Student/Borrower, Student/Borrower's DOB, Student/Borrower's Last Name, Student/Borrower's Address Information (Address, City, State Province, and Postal Code lines), CPS Transaction Number, Student Level Code, and Citizenship Status Code.
- Award Information – Examples: Total FWS Earnings, Award Year, Calendar Year

- School Information – Examples: Attending/Reporting Routing ID.]
- Remember that Test Cases are intended as a guide to submitting accurate records. Include only the test cases which are supported by your software. Keep as close to test cases as possible and include only the FWS program.
- An input file with an XML error will be rejected by the COD system with edit 210.

The system will process an input file with incorrect information (some examples of which are provided, above) and generate a variety of edits (depending on the number and degree of input errors) in its Response. Because an input file can contain a variety and combination of errors, it is not possible to list all possible edits occurring under all possible conditions.

The following are the most common edits and/or combination of edits that can result from a Response if the above information is not correct in the input file:

- Edits: 002, 007, 011, 012, 014, 020, 021, 024, 034, 100, 210, 218, 300, 301, 994, 996 and 998

It should also be noted that some edits also have companion edits. This means that if an edit is generated, it can be followed by a second edit because it is directly related to the first edit. When the first edit is resolved, this will typically also resolve the companion edit. Because of the variety and combination of errors that can be processed from an input file, not all possible edits and their companion edits can be listed.

Edits can be triggered for more than one type of error. For instance, an Edit 996 can be triggered by a variety of input errors (e.g., an incorrect Student SSN or a school having an incorrect or incomplete Award Year Setup). A single edit like this can occur under such varied conditions, due to the nature of the errors contained in that particular XML file. Depending on the award year, a particular edit or combination of edits can also be generated, based on incorrect information being submitted in the input file.

Even when an input file is in the correct XML format and contains correct information, it is still possible for the file to generate edits. In many of these cases, these are expected edits. In some cases, these edits can also have companion edits generated. Examples of the most common edits include (but not limited to):

- Award Year Setup
- Document ID

For more detailed information on specific edits, Schools should refer to *Volume 4, Section 4* of this technical reference for CB Common Record Edits. This reference guide specifically defines the edits and the edit types. The reference also identifies conditions under which the edit occurs and provides solutions/actions for preventing these edits from reoccurring in the future.

NOTE: COD manages the test environment and the processing of input records. Any concerns regarding the environment or input record processing should be discussed with COD. CPS is responsible for the ISIR layout and COD manages ISIR generation for School Test only. Any concerns about the ISIR layout should be discussed with FPS and any concerns about ISIR generation should be discussed with COD. School Setup Information is managed by COD. If you generate an edit for your School Information, and you have verified that your School Information is correct, you should contact COD.

## Test Cases: Step by Step

The following steps assist the schools in completing these submission tasks:

### CASE 1, FIRST SUBMISSION: FWS AWARD (CALENDAR YEAR ONLY)

If you have loaded the provided Test ISIR file some of the following data for this transmission may already be available in your system.

Verify the data in your system agrees with the test data outlined below adding or updating data to your system whenever necessary.

Step	Action/Input
1	<p>Originate FWS wages for Student #1 with an SSN = ###-##-0001, where ###-## represents the second through sixth digits of the specified OPE ID.</p> <p>For example: If the specified OPE ID is 07777800, the SSN for this student is 777-78-0001.</p>
2	<p>Submit a CB Common Record containing the following information:</p> <p>Student:</p> <p>Person Information:</p> <p>Student's Current SSN = ###-##-0001</p> <p>Student's Date of Birth = 1999-01-01</p> <p>Student's First Name = Student</p> <p>Student's Middle Name = PERSON</p> <p>Student's Last Name = TESTONE</p>
3	<p>Award Information:</p> <p>FWS Complex Element</p> <p>Calendar Year = 2023</p> <p>FPS Transaction Number = 01</p> <p>Total FWS Earnings = 1000</p>
4	Save the record.

Table 28: FWS Award

## CASE 2, FIRST SUBMISSION: FWS AWARD (CALENDAR YEAR AND AWARD YEAR)

If you have loaded the provided Test ISIR file some of the following data for this transmission may already be available in your system.

Verify the data in your system agrees with the test data outlined below adding or updating data to your system whenever necessary.

Step	Action/Input
9	<p>Originate FWS wages for Student #2 with an SSN = ###-##-0002, where ###-## represents the second through six digits of the specified OPE ID.</p> <p>For example: If the specified OPE ID is 07777800, the SSN for this student is 777-78-0002.</p>
10	<p>Submit a CB Common Record containing the following information:</p> <p>Student:</p> <p>Person Information:</p> <p>Student's Current SSN = ###-##-0002</p> <p>Student's Date of Birth = 1999-02-02</p> <p>Student's First Name = Student</p> <p>Student's Middle Name = PERSON</p> <p>Student's Last Name = TESTTWO</p>
11	<p>Award Information:</p> <p>FWS Complex Element</p> <p>Calendar Year = 2023</p> <p>FPS Transaction Number = 01</p> <p>Total FWS Earnings = 524</p> <p>Award Year = '21-'22</p> <p>Award Information:</p> <p>FWS Complex Element</p> <p>Calendar Year = 2023</p> <p>FPS Transaction Number = 02</p> <p>Total FWS Earnings = 600</p> <p>Award Year = '22-'23</p>
12	Save the record.

Table 29: FWS Award Test Cases



## PREPARE DOCUMENT BLOCK AND ENTITY BLOCK FOR BATCH

Step	Action/Input
13	<p>Transmit the following Document tags with this batch to COD:</p> <pre> &lt;CBCCommonRecord xmlns=http://www.ed.gov/FSA/COD/CAMPUS_BASED/2024/v1.0b xmlns:xsi=http://www.w3.org/2001/XMLSchema-instance xsi:schemaLocation="http://www.ed.gov/FSA/COD/CAMPUS_BASED/2024/v1.0b  &lt;TransmissionData&gt;   &lt;DocumentID&gt;2022-08-29T09:09:09.001111111&lt;/DocumentID&gt;   &lt;CreatedDateTime&gt;2022-08-29T09:09:09.00&lt;/CreatedDateTime&gt;   &lt;Source&gt;     &lt;School&gt;       &lt;RoutingID&gt;11111111&lt;/RoutingID&gt;     &lt;/School&gt;     or     &lt;ThirdPartyServicer&gt;       &lt;RoutingID&gt;99999999&lt;/RoutingID&gt;     &lt;/ThirdPartyServicer&gt;   &lt;/Source&gt;   &lt;Destination&gt;     &lt;COD&gt;       &lt;RoutingID&gt;00000001&lt;/RoutingID&gt;     &lt;/COD&gt;   &lt;/Destination&gt;   &lt;Software&gt;     &lt;SoftwareProvider&gt;mite&lt;/SoftwareProvider&gt;     &lt;SoftwareVersion&gt;2.0&lt;/SoftwareVersion&gt;     &lt;OtherSoftwareProvider&gt;othermite&lt;/OtherSoftwareProvider&gt;     &lt;OtherSoftwareVersion&gt;4.0&lt;/OtherSoftwareVersion&gt;   &lt;/Software&gt;   &lt;FullResponseCode&gt;F&lt;/FullResponseCode&gt; &lt;/TransmissionData&gt; </pre>
14	<p>Transmit the following Entity tags with this batch to COD:</p> <pre> &lt;ReportingSchool&gt; &lt;RoutingID&gt; &lt;SchoolFinancialSummary&gt; &lt;FinancialAwardType&gt; &lt;TotalCount&gt; &lt;TotalReportedFunds&gt; </pre>

Table 30: Document Block and Entity Block for Batch

## SEND FILES TO COD

Step	Action/Input
15	Prepare the CB Common Record in XML.
16	Transmit the batch to COD via the SAIG using the message class CBTESTIN and your Test Destination Mailbox.
17	COD processes the batch and the Response records are then placed on the SAIG to be retrieved.

Table 31: Steps to Send Files to COD

## RECEIVE RESPONSES FROM COD

Step	Action/Input
18	Import the Response into the school's system. The message class is CBTESTOP.
19	Contact the FSA Partner and School Relations Center to verify the results and the successful completion of the second test cycle.

Table 32: Steps to Receive Responses from COD

## CASE 1, 2<sup>ND</sup> SUBMISSION: FWS AWARD (CALENDAR YEAR ONLY) MAINTENANCE

If you have loaded the provided Test ISIR file some of the following data for this transmission may already be available in your system.

Verify the data in your system agrees with the test data outlined below adding or updating data to your system whenever necessary.

Step	Action/Input
20	Update FWS wages for Student #1 with an SSN = ###-##-0001, where ###-## represents the second through sixth digits of the specified OPE ID.  For example: If the specified OPE ID is 07777800, the SSN for this student is 777-78-0001.
21	Submit a CB Common Record containing the following information:  Student:  Person Information: Student's Current SSN = ###-##-0001 Student's Date of Birth = 1999-01-01 Student's First Name = Student Student's Middle Name = PERSON Student's Last Name = TESTONE
22	Award Information:  FWS Complex Element Calendar Year = 2023 FPS Transaction Number = 01 Total FWS Earnings = 750
23	Save the record.

Table 33: FWS Award (Calendar Year Only) Maintenance

## CASE 2, SECOND SUBMISSION: FWS AWARD (CALENDAR YEAR AND AWARD YEAR) MAINTENANCE

If you have loaded the provided Test ISIR file some of the following data for this transmission may already be available in your system.

Verify the data in your system agrees with the test data outlined below adding or updating data to your system whenever necessary.

Step	Action/Input
24	Update FWS wages for Student #2 with an SSN = ###-##-0002, where ###-## represents the second through six digits of the specified OPE ID.  For example: If the specified OPE ID is 07777800, the SSN for this student is 777-78-0002.

Step	Action/Input
25	Submit a CB Common Record containing the following information: Student: Person Information: Student's Current SSN = ###-##-0002 Student's Date of Birth = 1999-02-02 Student's First Name = Student Student's Middle Name = PERSON Student's Last Name = TESTTWO
26	Award Information: FWS Complex Element Calendar Year = 2023 FPS Transaction Number = 01 Total FWS Earnings = 624 Award Year = '22-'23
27	Save the record.

Table 34: FWS Award (Calendar Year and Award Year) Maintenance

## Wrap-Up

This section describes the final steps associated with the testing process and provides some suggestions for the school during the conversion to a production status.

## NOTIFICATION OF RESULTS

The FSA Partner and School Relations Center notifies the contact person at the participating school of the results of each test cycle. If problems are discovered, a retest is scheduled. The contact person should be available during the testing period to analyze problems, assist with, and coordinate any follow-up tests that may be required. Schools should contact the FSA Partner and School Relations Center if test results are not received or communicated when expected.

## PREPARING SCHOOL DATABASE FOR PRODUCTION

The school should clean out their system, by removing all test data, before sending production data.

- Warning: Ensure that the system date is changed back to the current date and that message classes and destinations have been changed from 'test' to 'production'.
- Warning: All test data MUST be removed from a school's system prior to beginning actual processing and before sending live production data to COD.
- Warning: Test Message Classes and the Test Destination Mailbox MAY NOT be used to process production data.

Production data is processed using the production message classes for Campus-Based Processing outlined in Volume 4, Section 3 of this technical reference.

## Addendum

This section describes updates to School Testing capabilities.

### ENVIRONMENT

The School Test environment is a full test environment. This means the test environment may roll the date forward as is done in Production. This will not impact Phase 1 Manual Verification. But it will impact Phase 2 testing. Upon commencement of Phase 2 testing CB Common Record Schools Test, Current Processing Date (CPD), will be set to August 8, 2024. Once the real-world date catches up with this date the School Test Team will roll the date so that the School Test environment will match the real-world date.