Session #HO2

Hands-On COD Basics

Jennifer Pattison
U.S. Department of Education
2019 FSA Training Conference for Financial Aid Professionals

December 2019
Common Origination and Disbursement (COD)

- Welcome!
- Person Menu
- School Menu
- Batch Menu
Welcome JENNIFER PATTISON

Welcome to the Common Origination & Disbursement Web Site

Financial Aid Administrators, other school officials, and servicers can use this web site to verify batch status, submit data requests, check account balances, and enter or change institution data records via the internet.

To change your password: Change Password

COD News:
Information and Reporting Reminders for the FISAP (8/6/19) - 08/27/2019
REMINDER – FISAP Submission Deadline is October 1, 2019 (9/3/19) - 09/03/2019
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<thead>
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COD Processing Update

September 6th, 2019

REMINDER – FISAP Submission Deadline is October 1, 2019 (9/3/19)

The Fiscal Operations Report for 2018–19 and Application to Participate for 2020–21 (FISAP) is available on the Common Origination and Disbursement (COD) Web Site. The COD Web Site allows a school to complete and submit its FISAP online, receive real-time validation edits, and access prior-year data to assist in completing the FISAP. Schools should review all validation edits and ensure accuracy of the information reported. For information about accessing the FISAP on the COD Web Site, refer to the August 2, 2019 Electronic Announcement announcing that the 2020–21 FISAP is available.

As a reminder, schools that had Campus-Based expenditures for the 2018–19 Award Year and schools that wish to request funding under the Campus-Based programs for the 2020–21 Award Year are required to electronically submit a FISAP via the COD Web Site. The deadline for the electronic submission of the FISAP is 11:59 p.m. Eastern time (ET)
Help

Help Main

Click on one of the links below for aid or information regarding the system.

- Site Usage Help
- Glossary
- Department of Education Links
- Edit/Comment Codes '19-'20
- Edit/Comment Codes '18-'19
- Edit/Comment Codes '17-'18
- Edit/Comment Codes '16-'17
- Edit/Comment Codes '15-'16
- Edit/Comment Codes '14-'15
- Edit/Comment Codes '13-'14
- Edit/Comment Codes '12-'13
- Edit/Comment Codes '11-'12
- Edit/Comment Codes '10-'11
- Edit/Comment Codes '09-'10
- Edit/Comment Codes '08-'09
- Ability to Benefit
- Valid Completion Dates
- Privacy Notice

Information about browsers that are supported by this website and how to use the site navigation.

Frequently used terms related to the origination and disbursement processes.

Other sites related to the Department of Education.

Edit / Comment Codes Award Year '19-'20
Edit / Comment Codes Award Year '18-'19
Edit / Comment Codes Award Year '17-'18
Edit / Comment Codes Award Year '16-'17
Edit / Comment Codes Award Year '15-'16
Edit / Comment Codes Award Year '14-'15
Edit / Comment Codes Award Year '13-'14
Edit / Comment Codes Award Year '12-'13
Edit / Comment Codes Award Year '11-'12
Edit / Comment Codes Award Year '10-'11
Edit / Comment Codes Award Year '09-'10
Edit / Comment Codes Award Year '08-'09

A list of the approved Ability to Benefit (ATB) tests and states and the completion dates for which they are valid.

The privacy policy of this website.

Edit and Comment Codes '19-'20

Awards
Awards Information Edits
Disbursement Information Edits
Entity Information Edits
General Edits
Person Edits
Grant Data Requests Edits

Sep 09 2019 12:00 EDT
Practice Time

• Open COD
  • Locate the COD Processing Update
    • Find the latest news at the top of the page
  • Locate the 2019-20 Edits
    • Find Edit 051
Person Menu

Searching for Multiple results
- Counseling
- MPNs/ATS
- PLUS applications

Searching for Single results
- Person
- Applicant search
- Award
- Disbursement
Counseling Search

- Search by SSN (up to 10)
- Search by School Date Range (up to 7 days), and by Counseling type or all types
- Export search results into .CSV format
Promissory Note (MPN)/Agreement to Serve (ATS)

- Search by SSN
- MPN or ATS ID
- School Date Range (up to 90 days)
- Export search results into .CSV format

Note: MPN Expiration Date is the 10-year expiration date. This may not be applicable to your school if you use the Single Year MPN.
PLUS Application

- Search by PLUS APP ID
- Student or Parent SSN/Name
- School Date Range (up to 7 days)
- Export search results into .CSV format
Searching for Individual Records

• Applicant Data
• Person Data
• Award Information
• Disbursement Information
Applicant Search-Institutional Student Information Record (ISIR) Data
Person Information

Person Search

Use this screen to search for individuals. The information consists of student and borrower demographics along with details about the awards they hold. Please enter a Social Security Number or Name.

- Please enter full SSN for SSN search. (No dashes)
- You may enter up to nine characters of the last name and up to five characters of the first name.
- If you enter a partial name the search may take longer to display the results.
- If you enter a valid SSN, the Person Detail page will appear allowing you to view information an individual and their associated awards.
- If you enter a valid name, the Person Detail page will appear allowing you to view information about the person and their associated awards.
Person: All Awards

### Person All Awards Information

<table>
<thead>
<tr>
<th>Program</th>
<th>Total Award</th>
<th>Total Disbursement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pell</td>
<td>$5,000.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>TEACH</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>Direct Loan</td>
<td>$12,500.00</td>
<td>$3,734.00</td>
</tr>
<tr>
<td>SUBSIDIZED</td>
<td>$5,500.00</td>
<td>$1,400.00</td>
</tr>
<tr>
<td>UNSUBSIDIZED</td>
<td>$7,000.00</td>
<td>$2,334.00</td>
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<tr>
<td>PLUS</td>
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<td>$0.00</td>
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<tr>
<td><strong>Totals</strong></td>
<td><strong>$17,500.00</strong></td>
<td><strong>$3,734.00</strong></td>
</tr>
</tbody>
</table>
Person: Direct Loan and Pell Information
Direct Loan and Pell: Award Detail
Practice Time

• Log into COD

• Search for either your school’s Promissory Notes, Counseling or PLUS Applications

• Using one of your student's SSN’s search for that Person. Look at the information specific to them

• Search for a student's loan or grant with an actual disbursement date
Forged your token?

Login - FSA Access and Identity Management System

Security token unavailable?

To obtain a temporary passcode, please select a delivery method below.

Note: Temporary passcode sent via SMS only applies to U.S. based/phone number.

○ Send a temporary passcode via SMS?  ○ Generate a temporary passcode?

Answer Challenge Question

To obtain a temporary one time passcode, please answer the following challenge question and click "Cannot".

Question 1:

* Answer 1:

Question 2:

* Answer 2:

Back to Login  Acquire Passcode
School Menu

- School Summary
- Options
- Funding Information
- Balance Confirmation
- Reopen/Extended Processing

### School Summary Information

Enter the default selections here for Program and Award Year:

<table>
<thead>
<tr>
<th>Default Program</th>
<th>DIRECT LOAN ✓</th>
<th>Default Award Year</th>
<th>'17-'18 ✓</th>
</tr>
</thead>
</table>

**Contacts**

<table>
<thead>
<tr>
<th>Type</th>
<th>Name</th>
<th>Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>FINANCIAL AID ADMINISTRATOR</td>
<td>Jane Doe</td>
<td>(202) 222-3333</td>
</tr>
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</table>

**Summary**

<table>
<thead>
<tr>
<th>Award Year</th>
<th>Program</th>
<th>Cash &gt; Net Accepted &amp; Posted Disbursements &amp; older than 30 days</th>
<th>$0.00</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Program</td>
<td>% of Cash &gt; Net Accepted &amp; Posted Disbursements</td>
<td>0.0%</td>
</tr>
<tr>
<td></td>
<td>Program</td>
<td>Cash &gt; Net Accepted &amp; Posted Disbursements</td>
<td>$2,187.00</td>
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<tr>
<td></td>
<td>Program</td>
<td>Current CFL</td>
<td>$2,187.00</td>
</tr>
</tbody>
</table>
School Menu: Options

### School Options Information

#### Program: DIRECT LOAN

- **Award Range Request 1:**
  - **Display "Other" Option:** Y
  - **Participate in Electronic Parent PLUS Application:** Y
    - **Electronic Parent PLUS Application Participation Date Range:** 07/10/2017 to 12/01/2022
  - **Parent PLUS Application Response Option:** Daily

- **Award Range Request 2:**
  - **Participate in Electronic Grad PLUS Application:** Y
    - **Electronic Grad PLUS Application Participation Date Range:** 07/10/2017 to 12/01/2022
  - **Grad PLUS Application Response Option:** Daily

- **Award Range Request 3:**

- **Award Range Request 4:**

#### Program: PELL

- **Allow Drawdowns:**
  - **Number of Future Days to Display Disbursements:** 14
  - **Error Processing Options:**
    - **Allow Drewdowns:** N
    - **Corrected:** Corrected

- **Web Activity Response Option:**
  - **Y

- **Administrative Cost Allowance - SFA Option:**
  - **Y

### School Information

- **School Summary
- Financial Aid Contact
- Eligibility
- General Options
- Funding Info
- Summary Financial Info
- Refunds of Cash
- Cash Activity Events
- Yearly Totals Relationships
- Balance Confirmation Request
- Reopen/Extended Processing
- Correspondence File Share/Messages Report Selection Experimental Sites Initiative Upload

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*Federal Student Aid*
School Menu: Funding Information

School Funding Information

<table>
<thead>
<tr>
<th>Program</th>
<th>Award Year</th>
<th>Entity ID</th>
<th>Initial CFL</th>
<th>Current CFL</th>
<th>Previous CFL</th>
<th>CFL Adjustment</th>
<th>Last CFL Change Date &amp; Time</th>
<th>Available Balance</th>
<th>Cash &gt; Net Accepted &amp; Posted Disbursements</th>
<th>Net Accepted &amp; Posted Disbursements</th>
<th>Net Drawdowns</th>
<th>Date School Confirmed Program Year Closeout</th>
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<tr>
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<td>$1,732.00</td>
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<td>$37,218.00</td>
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<td>$46,530.00</td>
<td>$0.00</td>
<td></td>
<td></td>
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Practice Time

• Log into COD
• Search for your school
• Locate your Options for web responses for both Pell and Direct Loans
• Locate your school’s Cash > Net Accepted and Posted Disbursements for either Pell or Direct Loans and determine if you need to send actual disbursement records to COD
Batch Menu

Search for:
• Batches for your School
• Anticipated Disbursement Queue
• Report Requests
Batch Searches

Document Types
AC--TEACH Annual Counseling
AT--Agreement to Serve
BN--Booking Notification
CO--Credit Decision Override
CS--Credit Status
EC--Direct Loan Counseling
ND--Negative Disbursement
OF--Origination Fee and Interest Rebate Percentage
PN--Promissory Note
PS--Payment to Servicing
RS--Common Record
SP--PLUS Application Acknowledgement
SU--Subsidized Usage
WB--Web Initiated batch
Anticipated Disbursement Queue

Search by ID, Award Year, Program Type, Disbursement Date Range, Disbursement Status, Disbursement Amount greater than or equal to $0, and then release up to 100.
Report Requests: Pell and TEACH

Delivered to school’s Student Aid Internet Gateway (SAIG) Mailbox
May request

- Electronic Statement of Account (ESOA)
- Multiple Reporting Record (MRR)
- Reconciliation File*
- Pell POP report**
- Year to Date Record (YTD)*
- Verification Status Report

*Report readers available
**Potential Over award Process (POP)
Report Requests: SAS Disbursement Detail On-Demand

- Sent to school’s SAIG mailbox
- Available for Pell, Direct Loan and TEACH
- Month to Date, Year to Date and Date Range
Practice Time

- Log into COD
- Navigate to the Anticipated Disbursement Queue
- Search by program to see if you have any pending disbursements in the past
- Search by all programs to see if you have any pending disbursements for January 2019
Additional Resources

Federal Student Aid E-Training, formerly "COD Computer Based Training (CBT)".

- Log-in to the E-training website at https://fsatraining.info/login
- Navigate to the Main Menu bar. Select “Systems Training” > COD Training > then select the Getting Started with COD Program Icon

COD Technical Reference on Information for Financial Aid Professionals (IFAP)

- https://ifap.ed.gov/ifap/byAwardYear.jsp?type=codtechref&display=single
Questions and Answers

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codsupport@ed.gov