

ID	Description	Issue Leader	Resolution Date	Plan for Resolution / Status	Notes	Driver	Status
1	Data Migration (RFMS / DLOS)	Paul Hill	03/19/01	<p>Initial discussions w/ PELL and DL systems and operations staff occurred in January</p> <p>COD integration and functional requirements teams currently working to consolidate requirements gathered and identify both gaps and data needs: by 3/14</p> <p>Two follow-up/ working sessions to be scheduled ASAP to fill gaps and review data provided PELL and LOS</p> <p>Recommendations week of 3/19</p>	Drives Legacy Retirement	COD Business Case	Open
2	Legacy System Retirement	Paul Hill	03/21/01	Natural output of Data Migration working sessions	Significant factor in COD Business Case	COD Business Case	Open
3	COD Customer Service Scope (Assignments of Duties & Functions to Legacy & new COD partners)	Doug Tinder (AFSA)	03/13/01	<p>Working Session: Session 1 - 2/22</p> <p>Review with Title IV Leadership - 3/1</p> <p>Recommendations 3/2</p> <p>Steering Committee Presentation 3/13</p>	Drives Recommended Customer Service Solution	<p>Feb '02 Deployment</p> <p>Key risk mitigator</p>	Open

ID	Description	Issue Leader	Resolution Date	Plan for Resolution / Status	Notes	Driver	Status
4	COD Customer Service Conceptual Design/Solution	Doug Tinder (AFSA)	04/10/01	Working Session(s): Session 1 – 2/22 Update - 3/15 (e-mail) Trip to LOC - 3/26 - 3/27 Title IV Leadership Discussion & Review - 4/3 Steering Committee Presentation - 4/10			Open
5	ED Express Modification	Paul Hill	03/20/01	Discussion w/ NCS on possible modification to 02-03 software 3/13 Proposal for ED ExpressModification - Title IV Leadership -3/15 COD Steering Committee Presentation 3/20			Open
6	Promissory Notes - Technical Implementation	Katie Crowley	03/14/01	Initial discussion with DL staff and EDS - 1/23 Agreement on decision to keep P-Note intake and processing with EDS for 02-03 - 3/01 Meeting with EDS and TSYS to determine technical implementation options for keeping P-Note processing at EDS during first year of COD - 3/26	Impacts Recommended Customer Service Transition/ Solution		Open

ID	Description	Issue Leader	Resolution Date	Plan for Resolution / Status	Notes	Driver	Status
7	COD Year 1 Scope	COD Leadership Team	03/13/01	Initial discussion with DL on current scope 1/23 Initial discussion with Title IV Delivery leadership 2/21 Follow-up discussion with Title IV Delivery leadership 2/23 Information related to items not definitely included in COD scope for February 2002 included (per initial discussions w/ TitleIV leadership team 2/23): 1. Promissory Note Processing 2. Output Management 3. Warehouse 4. Forms Development 5. Appeals Processing (PLUS Borrowers) COD proposal for initial scope – COD Steering Committee 3/13	Impacts Business Case Impacts recommended Customer Service Solution and Systems Retirement		Open
8	QA review and documentation procedures	Jay Schooley / Gene Murphy	03/30/01	Determine whether full IV and V procedures will be used or identify a viable alternative. Make recommendation to COD Steering Committee. Mod Partner CMM work underway; initial review of program 3/26. Integrate SFA QA (Denise Hill & Mike Rockis) resources week of 3/19.	Will be used throughout the project to ensure that quality standards are satisfied.		Open

ID	Description	Issue Leader	Resolution Date	Plan for Resolution / Status	Notes	Driver	Status
9	Requirements Management tool selection	Gene Murphy	03/20/01	Evaluate the viability of using "Rational" and alternatives. Determine initial recommendation - 3/9. Review recommendation with Mod Partner and SFA CIO Rep (Harry Feely) - week of 3/12. TitleIV Leadership Review - 3/15 Steering Committee Presentation - 3/20	Will be used throughout the project to document requirements.		Open
10	Case tracking tool selection	Doug Tinder (AFSA)	04/10/01	Identify options and make recommendation to the COD Steering Committee. Note: date will be impacted by decisions related to On-Line Access.			Open
11	PEPS- "official" source of School Eligibility data.	Katie Crowley	03/30/01	Determine whether schools data needed (but not currently contained in PEPS) will be stored within COD.	Dependent on whether SFA pursues Consistent Answers for Customers business case, including implementation of operational data store for institutional data (External Dependency #)		Open
12	Web Access Approach	Gene Murphy	04/15/01	Identify mechanism(s) for providing on-line access to (a) schools, and (b) CSRs			Open

ID	Description	Issue Leader	Resolution Date	Plan for Resolution / Status	Notes	Driver	Status
13	FMS	Katie Crowley	04/10/01	<p>Determine which core "funds management" processes will take place in FMS versus COD.</p> <p>Work closely with FMS team to review requirements.</p> <p>Meet with FMS leadership (Paul Stonner, Linda Paulsen, Sheila Modesitt) to outline options and identify initial recommendations - weeks of 3/13 and 3/20</p> <p>Review initial recommendations with Title IV Delivery Leadership Team - 4/5</p> <p>Discuss with Steering Committee 4/10</p>			Open

ID	Description	Issue Leader	Resolution Date	Plan for Resolution / Status	Driver	Status
1	School Performance Measures	Sharon Barfield/ Sue O'Flaherty	4/10/2001	Initial draft of potential measures complete	Deployment Communication to Schools to Allow for Measurement Period	Open
2	Common Edits	Sharon Barfield/ Holly Hyland	4/3/2001	Identification of Tier Edits First Draft of Student Eligibility Edits - Common and by program (Pell and DL) - 3/19/01 Review with SFA process owners - week of 3/26/01 Recommendation for changes to edits: 4/2	Deployment Recruiting of Phase-In Schools	Open
3	Pennies / Rounding	Sharon Barfield/ Holly Hyland	3/27/2001	Discussion with User Steering Committee - 3/26 Review prior discussion papers - in process Discuss recommendation with Title IV Delivery Leadership Team - 3/21	Recruiting of Phase-In Schools	Open
4	Change Records	Sharon Barfield/ Holly Hyland	4/10/2001	Draft approach - 3/19 Discuss approach with Title IV Delivery Leadership Team - 3/21 Discuss approach with Schools Focus Group - week of 4/2 or 4/9	Deployment Recruiting of Phase-In Schools	Open

ID	Description	Issue Leader	Resolution Date	Plan for Resolution / Status	Driver	Status
5	School Identifier	Katie Crowley	4/10/2001	<p>Determine identifier to be used in common record.</p> <p>Participate in conversations with Mod Partner and SFA representatives to determine whether an initiative might start to develop mapping software across identifiers.</p> <p>Work with campus-based and FMS to determine whether same identifier can be used across modernized systems.</p>	Dependent on SFA's movement toward Single School Identifier	Open

COD Implementation Plan Key Dates

1:21 PM4/3/2001

ID	Description	Issue Leader	Date	Notes	Status
1	Common Record Definition	Dick Tombaugh / Jim Zimmerman	3/21/2001	Draft review w/ SFA underway: DL Review 2/21 Pell Review 2/22, 3/1 CB Review 3/5 Combined review of comments/findings 3/5 <i>COD Common Process team review and modification 3/16</i> Common WG review 3/21-22 State Grant review (week of 3/26) Plus and Loan Alternative Supplement delivered 3/6 NSLDS blocks to be delivered 3/9. Determine status & need for drill down on State	Open
2	COD Capability Requirements Common Process Student Eligibility Response Record Financial Accountability On-Line Access Reconciliation Support Reporting	Jay Schooley/ Sharon Barfield	 4/3/2001 4/10/2001 4/17/2001 4/17/2001 4/10/2001 4/17/2001 5/31/2001	On schedule; ongoing detailed requirement sessions being held.	Open

ID	Description	Issue Leader	Date	Notes	Status
3	EAI Infrastructure COD EAI Development Env. Established COD EAI VDC Production Environment Established EAI Common Record ready for COD Testing EAI Common Process I/F's available (CPS, PEPS, COD) EAI Financial Mgmt I/F's available (FMS, DLSS, NSLDS, CBS II) B-Trade Adaptor to EAI Bus	Bruce Kingsley / Bob Rosscoe / VDC	4/3/2001 6/14/2001 7/31/2001 7/5/2001 11/13/2001	3/13 - Infrastructure installed at VDC; client software to be installed next. On track for dev env readiness 4/3.	Open
4	Infrastructure VDC – TSYS Link	Bruce Kingsley / VDC	4/10/2001		Open
5	Establish 3 rd Party Developer Test Environment	Bruce Kingsley / VDC / Total System	8/15/01* (date under review)		Open

COD Implementation Plan Key Dates

1:21 PM4/3/2001

ID	Description	Issue Leader	Date	Notes	Status
6	COD Capability Development CDR Build & Unit Test On-Lines Access CDR Build & Unit Test Reports Tool Selection Implementation	Jay Schooley	6/15/2001 9/5/2001 8/30/2001 10/30/2001 7/5/2001 1/23/2001		Open
7	Customer Service Requirements Case Tracking Tool Selection CDR Build & Test CSR Training Facilities Prep	Doug Tinder	4/13/2001 4/10/2001 6/19/2001 11/30/01 1/1/02 - 1/31/02 12/31/2001	Requirements on schedule. Case Tracking tool selection proving difficult; phased implementation approach may be recommended. More to follow in coming weeks.	Open
8	Capability Test Common Proc & Fund Mgmt Integration Test Performance Test Acceptance Test On-Line Access Integration Test Performance Test Acceptance Test Co-Test w/ LOS Co-Test w/ REMS	TSYS	9/20 - 10/19/01 9/20 - 10/9/01 10/22 - 12/31/01 11/1 - 12/15/01 11/1 - 12/15/01 12/31/01 - 1/15/02 Start 12/14 TBD		Open
10	Training User Procedures, Job Aids Deliver Training Courses	Mimi Yeh	8/20/2001 11/8/2001		Open

COD External Dependencies

1:21 PM4/3/2001

ID	Description	Issue Leader	Date	Notes	Status
1	FMS Data Interface	Sheila Modesitt - (FMS) / Bruce Kingsley (COD)	6/15/2001	Key staff identified on both projects responsible for successful integration	
2	CBS II Arch & Data	Kerry Trahan /	5/14/2001	Less critical to overall COD initial successes	
3	B-Trade Solution Defined	Bruce Kingsley	5/15/2001	Working Session(s):	
4	EAI / COD Development Env Established	Bob Roscoe (EAI) / Bruce Kingsley (COD)	4/3/2001	3/13 - Infrastructure installed at VDC; client software to be installed next. On track for dev env readiness 4/3.	
5	Common Record EAI "translators" available for testing	Bob Roscoe (EAI) / Bruce Kingsley (COD)	4/24/2001	Discussion w/ NCS on possible modification 3/13 Proposal for ED ExpressModification - Title IV Leadership -3/15 COD Steering Committee Presentation 3/20	
6	COD / VDC Production Environment	Bob Roscoe (EAI) / Bruce Kingsley (COD) / VDC	6/14/2001		
7	VDC - TSYS Link and EAI as required @ TSYS	Bob Roscoe (EAI) / Bruce Kingsley (COD) / VDC / TSYS	7/17/2001		
8	COD Test Environment for 3 rd party developers		8/15/2001		
9	GAPS - Timing of Funds Release	Paul Hill	5/31/2001	Work closely with FMS staff to identify and assess impacts to COD funds release window	
10	Determination of whether SFA will be moving to enterprise solution for imaging			Impacts whether we transition P-Note processing to COD. Does not impact for 02-03 as EDS will continue to perform P-Note intake and imaging for that award year.	