



[BOB MARTIN:] We have a set of exercises for you to work today to get familiar with EDEExpress. Before we cut you loose doing that, I want to introduce some things to you, introduce some people to you, and also tell you a little bit about EDEExpress. How many of you here are new to financial aid, new to Title IV programs? Okay, we'll pray for both of you. You'll eventually get it. It's a fun adventure. You'll get to the point where you'll almost have it and then we're going to change everything for you and then you'll have to learn it all, but you've chosen a good profession. How many of you use EDEExpress now but just don't use Direct Loans module? Okay, quite a few of you. Of those people, how many of you use it to do Pell? Do you know about the additional eligibility indicator check box in Pell? Okay. Of the other people, how many of you use EDEExpress in combination with a school system? Okay, right. For you folks, you know you can use EDEExpress now to do Direct Loans the same way using the same system. If you're just using Express to turn your data into an XML document, you can do that with Direct Loans as well as you can with Pell, TEACH, ACG or SMART.

We have an agenda. Some of the things we're going to talk about, some of it I'm going to emphasize, some of it I'm not going to emphasize or de-emphasize, so let's get down to the third slide. So, what is EDEExpress. First of all, it's free. It is a software application we put out every year for each award cycle. We do it twice. We have two releases per year. The first release is in January so you can get started with your ISIRs and get started on applications. That contains the global module. Global is that which affects all other modules within EDEExpress and we have an app express module and a packaging module. And then around late spring, March or April timeframe, we do release #2 which contains your grant and your loans module. We also have a TEACH grant module in there that we added a couple of years ago.

In EDEExpress you can do many things, originate loans. You can print MPNs but I'm telling you here right now you don't want to be doing that. We're going to show you how to do it, but I want to try to talk you out of it and I'll tell you why in a minute. You can create disbursements, you can print reports, you can pull reports from within the EDEExpress and you can also print reports that come from COD. You can bring them into EDEExpress and pop them up on the screen and peek at them and then you can print them off as well.

Of course, EDEExpress allows you to export data that you have created. Remember that for sending things to COD that is a two-step process. You have to export out of EDEExpress and then you have to actually transmit over SAIG. Most of you use a little product that we produce call EDconnect to do that. That's the transmissions interface and that [Inaudible] SAIG and allows [Inaudible] from COD after your data has been processed.

Setting up the software is pretty smart, it is pretty functional. It does a lot of amazing things but you have to tell it some things up front before it knows who you are and that is called setup. We have some exercised that I'm going to have you do some of that. Those of you who are more experienced probably want to jump to another track, but you do have to input some things first before you can get started. You're going to be entering things like your source, entity ID. For those of you who don't know what entity IDs are, these are eight-digit, random numbers generated by the COD system. When you are deemed to be eligible to participate in some of these programs and you will be given these entity IDs. You will be dealing with three of them. One of them is your attended campus entity ID, your reporting campus entity ID and your source entity ID. For you smaller schools, all three of those numbers will be the same. For some larger schools who process for more than one campus, you may have different numbers to plug in there, but you will plug all of those in set up and that way those are embedded in our header



and trailer records in the data that goes to COD and so that is how we know who you are and where that data is coming from.

COD disbursement profiles are something we're going to have you set up in EDEXpress. You don't have to do that in Pell now, but you do have to do that for Direct Loans, so that is one change that those of you who are doing Pell now, you actually know how to do Direct Loans because they are very similar, but we do have to have a minimum of two disbursements in Direct Loans and we'll show you how to set up a disbursement profile to help you do that and save you some key strokes down the road.

Let's look at the next screen. A couple of things I want to tell you about before I talk about this particular screen shot. Some of you probably already know that you can go on COD on line and you can originate a Direct Loan and you can also originate a Pell award. I'm telling you right now, don't do that. If you're going to use EDEXpress you always want to be in sync with what COD has and the only way you're going to do that is start out in EDEXpress. If you're going to do some work on line, this is the way you do it. You first originate your loan in EDEXpress and send that off to COD or your Pell award. In EDEXpress, send it off to COD and let COD process it and import the responses so now you have the same thing on your database that COD has. Now, if you want to go up to COD on line and do a disbursement, you can do that and COD will generate a web-based response for you that comes back to your campus and then you can import that into EDEXpress and you're still in sync with COD, but if you don't start out in EDEXpress, then you'll never be able to sync your records up. Just a little word of caution there.

This is a loan origination record for LOR. You'll hear us refer to these as LORs. This is what it looks like. You'll see that there are several functional buttons across the top. You also have a command line there with file review, view, process, tools, that kind of thing. We also have icons right below that which do some of the same functions for you. One of the buttons that Jody likes me to talk about is just to the left of the plus sign up there. If you have more than one sub or unsub Grad PLUS loan, you get to those screens using those buttons. Also, we have highlighted ... Down at the bottom, you'll see that there are tabs. Those tabs take you from screen to screen. When you have a loan origination record, you are creating it, but you have not originated it yet. The disbursement tab is not enabled; it is grayed out. Once you originate that loan, and for you FFEL folks, originate is certification. In the FFEL world, you certify a loan. In Direct Loans you originate it. Once you originate a loan, you are telling us this is for an eligible borrower. Okay.

Look down at the bottom right and you'll see an arrow pointing up. On this screen, it's pointing to an M. The status is M. That means the source of this loan origination record was M. It was done manually. If you import an ISIR to do this, it would say I. If you brought it in from your school system, it would say E for an external add. It just tells you where that data came from.

On the upper right, with the arrow pointing down, it is telling you what the origination status is and in this case, the origination status is R, meaning ready to send. It is ready to go to COD. The next time you do an export in EDEXpress, EDEXpress will look for all records with a status of R and it will pick it up and it will put it in a file ready to send off to COD. Then, of course, the last arrow on the bottom left pointing up is showing you the loan ID. The loan ID is generated when you originate and you will see there is a combination of a Social Security Number, the type of loan and in this case it is S and so that is a subsidized loan, and then your G code or your direct loan code and it will have sequence numbers.



There are additional ways, I just mentioned three, ways to create loans. You can do it manually one at a time, you can bring some in using ISIR data and create them that way, and then you will have to add some additional data and that is part of the exercises, or you can bring them in from an external system. We can also do a lot of work through multiple entry function and there are some exercises in there that speaks to that. If you are one of those rare campuses that loses your data, loses your EExpress data, don't panic, we can send you a rebuild file for Direct Loans from COD that will help you rebuild your data base, just like we can send you a year-to-date file for Pell and do the same thing. Once we create a loan origination record, and you know it takes three things to have a booked loan and that's what you want. You want a loan origination record sent to COD that is accepted, a master promissory note that is accepted and a first disbursement record and the exercises are designed to show you how to do that.

Let me talk about MPNs for a few minutes here. I don't want you to get into the paper business. We want you out of the paper business. Direct Loans is designed to be speedy and if you insert paper into the process, then you've just slowed the process down. EExpress will print a master promissory note for you but the master promissory note is nothing but a boiler plate piece of paper with a whole bunch of writing on it and some blank spaces. EExpress prints in those blank spaces. There is a website, dlenote.ed.gov and that's where you go to do your electronic master promissory note. The borrower uses their pen to do that. The parent will use their pen to do their master promissory notes and then we will send you, once we accept that application or MPN execution, once COD accepts it, then we will send you an electronic response telling you that has been completed and you just bring that in to EExpress and EExpress will update the MPN status to A and that is step #2. If you decide to do paper and print these out, then you will have to print it out and you will have to get a signature and then you will have to print a manifest which lists all these MPNs that you are printing and then you'll have to FedEx them overnight to Montgomery, Alabama and get them scanned and then we'll send it to COD and COD will accept it and you just inserted 2 to 3 days worth of time in there and so you want to get away from that.

All of the dollar amount data that the student is interested in is actually on something called a disclosure statement and we want COD to print those and send them to our borrowers for us. I just wanted to tell you about that. If you want to discuss that more, see me while you're working on the exercises or see me in session #12 which is after this one, next door, or see us this afternoon when we do the EExpress focus group. Once again, once you do all of this, don't forget to send it to COD.

On the next slide you'll see a visual representation of what I just talked about. You create things in EExpress and you send them to COD. COD processes them and then sends you something back. Whenever you send us something, we will send you something. You can use other systems. You can refer to Volume III of the COD Technical Reference which is all for combination schools or what we call combo schools. Then we also have a function in EExpress where you can create file formats to pick up data in your EExpress database and move it in to your school system. If you need to know how to do that, that is something the IT people will have to help you with. We also have folks in our customer service CPS/SAIG customer help desk and that's for you, that's not for students, and they can help you do anything that you would like to perform and probably help you with some other systems as well.

Where do I get help? We have webinars out there. We have computer-based training off of IFAP; it's under Tools for Schools. We have publications that we publish. On the next screen you'll see we put out desk references for you to refer to if you need some help with particular functions. We put out cover letters telling you that the software is ready and ready for you to



download. Incidentally, if we send you a message, you get a message and you get a notice or get a letter saying that a new version or new release of EDEExpress is available for you to download, please go out and get it and download it and use it because generally what we're doing is we're fixing something or we're adding a function that you need.

We have installation guides to help you get them installed. We have help texts within the software itself. We're making some changes to help texts for 2010-11 that will help you in that regard. We also have something called the School Electronic Process Guide which talks to you about all the electronic processes, EDEExpress included.

One thing I would like to tell you is the exercises that you are doing here are in the 2009-10 version of the software. We are currently working on the 2010-11 version and next week Jody and I will be going and testing that and then once that is done, then we will put it out there probably close to the end of the year or the first of the year so it's available for you. We're always working a year ahead of where we are in processing.

Where else to I get help? Here is the 800-330-5947. You ought to get that tattooed on your forearm because if you have trouble, that's who you call and they will help you, I guarantee it. There is email if you prefer to communicate via email, there's the email address for you. On the next screen, there is some contact information for some people. I forgot to introduce everybody to you, but I'll do it now and it's good because they're all lined up in the back of the room and that means don't try to escape because we have you outnumbered. I want to tell you who some of these people are because there is a lot of experience in the room here to help you.

First of all, let me tell you who this lady is on my far right. I don't kiss up to too many people, but she's my supervisor, so I kiss up to her. Am I doing all right in that regard? Yeah, Ginger Klock is her name and she is the supervisor in Application Processing Division. All the PC software which I am responsible for comes under Application Processing Division. This lady right here is Sally Owings. Sally is senior test engineer for Vangent. Vangent is our contractor that produces the software for us. Standing in the back of the room, starting on my far left is Chuck Herman. Chuck and I have worked together since the 1980s, first as OPM investigators and then we came over to the Department to staff up the Direct Loan program. Chuck is also doing our Direct Loan Tools session, that is session 14. He is doing it once or twice every day and I urge you to attend his session because EDEExpress and Direct Loan Tools work in tandem. Standing next to Chuck is Amy Acres. Amy is the senior project director for EDEExpress. When things go wrong, I'm on the phone with Amy and vice versa. Standing next to her, the tall gentleman is Doug Baldwin. Doug is one of the help desk experts. Also, Doug writes most of the help texts in the Direct Loan/EDEExpress module. Standing next to Doug is Dave Bartlett. Dave is a former Direct Loan cam. He is now a training officer in Kansas City. The computer-based training that you will see on IFAP, Dave is the lead for that product so if you like it, think about Dave. The lady in the middle is Jody Sears. You may remember Jody from the general session yesterday morning. She filled in for someone who couldn't be here and did a great job. Jody assists me. I used to have a crew of five to do this and now it's just down to Jody and me. Jody is also the lead for the participation management piece, that's where you sign up for all your SAIG web services and so she gets to help me part-time and so I'm happy to have her and I love working with her. Gary Gavin standing next to her is one of the developers. I don't know anything about code. Gary knows everything about code, so he's the one who writes the code that underlies all the functionality in EDEExpress.

As we cut you loose on these exercises, work at your own pace. If you don't finish, you'll see that we're not filled up so come back in another session as this is going on every session and so



START HERE
GO FURTHER
FEDERAL STUDENT AID®

you can come back in and finish up or pick up where you left off. If you need help, raise your hand and one of us will come over and give you a hand and give you some help and we'll keep you moving right along.