Bob Martin: Welcome to Session 12, Using ED Express for experienced FAAs. My name is Bob Martin. I'm the PC Product Manager for Federal Student Aid and Application Processing Division. I'm responsible for ED Express, Direct Loan Tools, SSCR software. My co-presenter today on my far right is Jody Sears. Jody is a new supervisor in the Application Processing Division. So I may or may not be able to get her back here next year doing this with me. But Jody and I worked together for many years. So we're great friends and I'm happy for her promotion. I'm sad that she's not going to work as closely with me as she used to.

You'll see the name Kim Shrek here. Kim is also a good friend and colleague of ours and plus she cracks us up. So that's why we got her to come help us but then we're doing Web testing for FSA on the Web for the 11-12 and the FAA Access to CPS online and the pin site and so on and ICER Data Retrieval and it went long and they asked Kim to stay behind and help. So Kim won't be here today. So I'll do her slides and you'll know when that is because I'll stumble through them.

I have some announcements that I have to make to you. Please turn off all personal communications devices. Now I have a cell phone on and I'm not going to turn it off. If you get a call just walk outside and take your call please. I have a seven year old granddaughter who likes to call me and I'll take her calls. If you – when we get to the end if you have a question apparently the acoustics in this room are not that good and I'm not real good to remember to repeat your questions. So if you want to if you would go to the microphone or if you don't want to do that I'll try to remember to repeat the question so everybody hears it.

Evaluations this year are electronic. Remember we used to have the paper ones and you'd drop them in a big cardboard box at the back of the room? This year apparently we're going to e-mail those to you and I told every session, "If you like the session my name is Bob Martin. If you don't it's Jody Sears. Okay?" So if you need a printed copy of this presentation and I can't for the life of me figure out why you would but if you would like to have one go to the conference site when you get back home and they'll all be on there and you can print out what you need. If there's an emergency see the gentleman in the red shirt in the back? If you have a health issue let me know and we'll try to get some help to you. We will get help to you. We won't try. We will get help to you. I was going to say I'll wait till my slide is done, but no. I'll help you.

Okay, this is something we're doing – deviating from what we normally do. One of the problems with a conference like this is how much information do you give people and how – do you want to take a chance of overwhelming people. For new financial aid administrators it's way too much information at these conferences. The first one I went to I went home dazed and confused. So we generally tried to preach to the lowest common denominator which would be new people and that's what we generally do. But we realized this year that we probably need to provide a little more information than we normally do to people who were experienced and maybe for some experienced FAAs who were new to direct loans or new to ED Express Direct Loans maybe we need give some more information out. So that's' what this session is going to endeavor to do.

We're going to talk to you about some of the tools that are in there. It always amazes us when we start asking people – for instance, here's a question that – I'll ask it now Jody. I think you were going to ask it later but how many of you have downloaded and read the desk reference? See what I mean? We spend a lot of time and money creating user documentation, desk references for you that explain everything to do. Bless your heart. I had one hand. We would like for you to read them because those are the source of the questions for the problems that you are having. We have in another source if you don't have the number, 800-330-5947 memorized you should have. That's your first line of defense other than the desk reference or the installation guide or the cover letters. Those are – that's CPSSAIG technical help desk. They're the greatest customer service people that I've worked with and I know they'll help you. Thank you. They deserve it.

Okay, so let's talk about what we're going to talk about today. Here's the agenda. We're going to give you a little overview of Express. Talk to you about some timesaver set ups and then talk to you about some of the tools that are contained within Express that you may or may not use. We thought everybody used multiple entry. How many of you use multiple entry? Yeah. Multiple entry is one of your biggest timesavers ever. So if you're feeling overwhelmed and you're not using multiple entry you probably are overwhelmed. So we're going to talk to you about using that. Highlights and then it's the part I like is where we talk to you about what's coming up in the 11-12 products and then we'll talk to you about any other additional help or training or sessions that we're doing here this week.

This is a visual representation of ED Express. Anything to the right or the center median you'll recognize is release one, Global Apps and Packaging. Anything to the left you'll recognize is release two. What's missing? Who said it? I heard it. ACG and Smart. The software still has that functionality in it. We've sanitized all the documentation to take any reference to it out but if you look you'll find ACG and the National Smart functionality still in the software. But could I just say don't try to originate an ACG or a Smart award and try to send it in. It will just reject. It may not even make it out of ED Express.

We're going to leave that in there for a couple of reasons. I said yesterday we didn't take it out because of funding but probably more so because it's – there's – the reason it's not happening in this year is because Congress didn't fund it but if Congress gets really active and funds it for next year then maybe we'll use it. We'll resurrect it. Put it in the Pell? There you go. Take that down.

[Laughter] I'll speak – you may have seen the federal employees – President Obama suggested a two year freeze on federal employee salaries and I'm just feeling the sympathy from you but what I'm – that doesn't bother me because I think we need to feel a little bit of the pain but what I'm afraid of is that I'm going to get an e-mail from President Obama that's going to say, "Can you refund something I've already paid you?"

Here's some timesaver options. These are little things but they will save you some time. You can customize ED Express by user. So just because Joe Smith set it up one way doesn't mean you have to use it that way. You can customize it to yourself and you do it by the user. Here's the slide that you're looking at there. It shows that in this case we've selected Pell. What that means is that the default system to display every time you open up a dialogue box is going to fall to Pell. If you're the person in your office that does nothing but direct loans then set it to DO and it will save you a couple of clicks. Those are little timesavers.

Down here under single/multiple print. Do you automatically print multiple copies of something to printer? If you do that's probably not very green. Why don't you choose screen there, print it to the screen first and then see if it's something you want to make a hard copy of. You can put the default e-mail addresses to display and the default address whether it's permanent or local address.

All right, these are some of the tools that Jody and I are going to talk about. You know what? Amy did I introduce you? I don't think I did. Did I introduce this young lady to you? I'm very sorry. She made me mad earlier. No. *[Laughter]* This is Amy Akers. She's the Senior Project Lead for ED Express Vangent Incorporated. For those of you that have been around awhile that's the old National Computer Systems and then they turned into Pearson Government Solutions and then now they're Vangent Incorporated. Amy and I work together very closely and we're on the phone with each every day, several times a day sometimes screaming at each other but we get those products out and I couldn't do it without her. So I'm sorry I forgot to introduce you.

These are some of the tools that we're going to talk about and Amy's going to navigate through the slides for us and into the software a little bit. Query multiple entry browse user defined fields prior to your import. Yeah, I was just stunned yesterday when we did this session at the number of people who do not use multiple entry and we've made some changes to multiple entry upcoming in 11-12 which are going to be even handier for you.

Let's talk about queries for a minute. How many do not use queries? How many are scared to death of queries? You're afraid you're going to corrupt your database beyond redemption. Yeah, that's how I felt for a long time. Then years ago at one of these conferences somebody got sick and they said, "Bob, you've got to do the query presentation," and there was a young fellow from Vangent who was going to work with me named Brian Van Note. Some of you may remember him. He and I holed up in his hotel room the night before and he taught me query. So what I know about query is I can thank Brian for.

But a query is just away for you to request a sub-set of records, establish a set of criteria and pull a certain group of records from a large group of records. It provides flexibility in locating and extracting information from your database. Now what makes up a query? Well the three main components are data fields, operators and values. You'll see those are labeled there on the screen where you'll find those.

Choices for value. Now we want to talk to you about prompted execution. We have some predefined queries in ED Express. Years ago we realized that what we were asking you to do every year is recreate queries that you were going to use that year and it seemed so stupid to do that. So we started adding, just hard coding them in there and we think we got most of the kinds that you will use frequently but we did allow you to be able to modify the ones that we put in there so if it's not exactly what you need for your campus you can modify it for your campus. Those are called predefined queries.

We also put some things in there called parameter queries and a parameter query is one where you have fixed fields but unfixed values and you will prompt and you will apply those values probably at execution. This is particular true for where you have queries where you have day ranges or you're trying to pull a list of anticipated dispersments from next Monday to next Friday so you know how much to tell your business office to download from G5. What's another example? Anything I've added to my database this week. Maybe I want to pull that list. It'll use the current date which is the system date on your PC and then the value is whatever you put in there that goes with the data field. If you're not sure what that value should be there's a value help button that you can press and it will tell you what the valid values for that particular data field are.

What makes up a query? All those three things I just talked about. Now there is a definite order in which a query is processed. It goes left to right and then we process and before any or values but then that's trumped by parentheses. If you have a parenthetical expression that will be processed first. If you have a nested parenthetical expression that actually gets processed first then the parenthetical expression then the ands and then the ors. So that may be confusing to you. So let me show you a slide here. Well we took a query. Dependent students from Iowa whose parents number in college is greater than one or who's adjusted gross income is less than $25,000.00. Now you can tell some of our friends at Vangent in Iowa made this query up because if I had done it it would have said Texas.

But anyway you will down there at the bottom in that large field that there are some nested parenthetical expressions and then there are some parenthetical expressions and then there's an and statement in there and a couple of or statements. So the way this works is if you look on this next slide there for the first subset of records, that's records with the pen C status of D for dependent and the student's legal residence of the state of Iowa will be found. In the second subset of records, records with parents number in college is greater than one or parents adjusted gross income is less than $25,000.00 will be found. Only records that fall in both of those will end up in the large sandy brown circle to the right. The final result, only records found in the first subset and the second subset will appear in the final result.

So if you're not using queries play with them a little bit. If you're not comfortable with them go down to our hands on session in session 13. We'll do it again tomorrow morning at 11:00 and at Northern Hemisphere one and two. Is it Northern? No. What is it? E one and two. Yeah. We have a set of exercises in there on how to create a query and how to use it and how to employ it. So that might help you get more comfortable with it.

When you're in the print dialogue box or the export dialogue box or import or export dialogue box or in multiple entry if you put the selection criteria button, a little field of dialogue box pops up and that's where you can employ these queries. You can go in and select the query that you want. Another word of caution is that when you create the query if you – whatever module you create it in that's where you need to use that query. You can't create one in Pell that you can use in Direct Loans. It doesn't work that way.

Here's a visual representation of where you can use a query and how it's used. In the first dialogue box you'll see it's a print dialogue box and you'll see that we have the selection criteria button circled there and that prompts that box in the middle left, the selection criteria and then that's where you would select the query that you created to employ when you're trying to print whatever it is that you're trying to print here. They've got ICERS there but – so they're trying to print a list of ICERS with specific information.

The other one is the import dialogue box and you'll see that, again, they clicked on the selection criteria button. They're using college grade level. In this case what the value is they're looking for students that have a college grade level of two. So that's the list that they're trying to pull.

Okay, let's talk about multiple entry for a minute. You can update lots of fields at one time in global packaging, Direct Loan, Pell and Teach for multiple students at one time. Field available to update depend on which module you're in. Again, you can use selection criteria and you can either use the query that I just talked about or if you use selection criteria you can pop up a list of records in your database and you can select certain records but you can do many of them at the same time.

With multiple entry you get two chances. You get the first dialogue box and then you get the second dialogue. The second dialogue box is what I like to call your second chance because if you're doing something wrong you have a second chance to back out before you mess up a bunch of records. In the first multiple entry dialogue box which is blue you select one or more fields to update and then you choose the value for those fields or you can leave the value blank because you're going to get a second chance to apply a value. Or in some instances you may want to update the value to blank.

Once you do that you'll get a second dialogue box and if you chose a value in the first one then you'll see all the changes that you made are in blue and those are all the records that you're going to affect. At that point if you've made a mistake you can deselect those records and not update some you didn't intend to update. You'll see the student names and record identifiers. Again, as I mentioned you can deselect.

Now this is what it looks like in the software and you'll see in this case we're trying to do a multiple entry of college grade level of zero in the – that's in the Teach multiple entry dialogue box. If you'll look at the one on the right that's for global multiple entry. What we're trying to do there is update verification status codes of several records at one time. It looks like we're choosing the value of S there. Now Amy stay on this slide for just a second because I want to talk to you about another item that appears there.

See the – it's line 5, Teach exit counseling completed date? As you know right now for Teach counseling that's done on the Direct Loan Servicing System and we're sending you a file that tells you that that interview was completed for – it's moving. DLSS Website is going to close down at some point. So we have to move those – that functionality. That's moving to NSLDS.

Just as you know now that Direct Loan entrance counseling can be done in one of two places, either StudentLoans.gov or on Direct Loan Service System site. Each time they do that we send you a file and whatever file – wherever they do it ED Express can handle either one of those files. What we'll do is we'll extract the date and populate it on the demo screen. We don't save anything else. We do display it so you can see the report itself but we'll auto populate those dates.

The exception of course now is Teach. Teach is moving – Teach Exit Counseling is moving to NSLDS. You'll still get a file for

NSLDS for it and we will – but what we're not going to do is auto-populate that field. There is a field there for it but we're not going to auto-populate it. You're going to have to do that manually. One of the ways to do that is right here with multiple entry. You'll get a file and if there's five – if you have five students who did exit counseling this week than that file will have five people and you can update them all right here.

This is your second chance screens here and you'll see in the global multiple entry we decided to update the verification status code to V and all of them have changed to blue meaning their going to change unless you deselect one of those loans. On the other one under global multiple entry you'll see that we didn't select a value. We left the value. We selected the records but we didn't select the value. Now we can go in here and either correct it – either leave it alone, deselect it or we can change the value here.

Relative edits are applied when you use multiple entry depending on which module you're in and if an update doesn't pass the edits the information is printed on a report so you'll see what went wrong. Now for 11-12 we're going to add a couple of multiple entry items there for you. Update loan amount approved. If you have a bunch of loan records in there and you haven't put loan amount approved, you just created them but you haven't originated them you can go in and designate loan amount approved using multiple entry. The other thing is we're going to allow you to originate a loan. If you went in and created those loans but you haven't originated them and now you've already added loan amount approved and now you're ready to originate them you can go in and do several of them at once.

So let's talk about browse. This is another. There's a lot of good information in ED Express if you know how to get to it. Browse is one of those ways to get to it. You can use browse to view data in a spreadsheet format. That's because we're going to allow you to export a grid to a spreadsheet if you want. Browse allows ease of viewing, searching, printing and exporting multiple records in the query fields that you have created or that are already there are available for you to take a look at in browse as well. Here's what a browse grid looks like if you've never seen one. Can you go into – let's go into the software and I'll get Amy to open up browse. We'll show you what it looks like live.

There's the browse for Deona. You'll see that the column headings are there and if you scroll to the right you'll see there's all kinds of good information in there. Now one of the nice things about the browse grid is that – let's go back to one that's got some data in it. If you put your cursor up there in the column heading and do a right click a little box appears and you'll see that you have the option to do several different things. You can sort it different ways but one of them is that export to grid. So if you're used to using Excel spreadsheets because somebody in another office needs a bunch of data from you then this might be a way that you can get that data quickly.

Female: ______ ______ all the columns?

Bob Martin: The columns you select. Yeah, you'll select them. Okay. All right, I'm going to sit down now. We're going to let Jody come up and talk to you about some other items.

Female: If we have a question about exporting from the grid can I ask it now?

Bob Martin: You bet. Go ahead.

Female: In the past when I've tried to export from the Pell grid it gives – because it pulls data from different places –

Bob Martin: Tables.

Female: - different databases –

Bob Martin: Tables.

Female: Okay, different tables. Thank you. It gives me information that's not very usable because it's – if you picture an Excel spreadsheet I would like a student with all their data across here and what I get is a student with data that goes down and then here's another student with data that goes down and then I can't sort it and it's not very usable. Does that make sense? I've talked to Doug Baldwin about this multiple times at length. So if he here?

Bob Martin: Doug has ruined more stuff for us.

Female: He knows what I'm talking about but it just – it would be nice to be able to give that data to somebody else quickly but it doesn't work so well with Pell. It works with Direct Loan. Not so well with Pell.

Bob Martin: Yeah. Amy says it's exporting by student rather than by table and that's what the issue is. We'll take a look at it. I don't know how –

Female: I don't know. I know what _______ ______ _______ ______.

Male: You're talking about exporting external loan data and not exporting –

[Crosstalk]

Female: Wild format.

Bob Martin: Oh okay. Were you able to resolve her problem?

Female: No. Come talk to me. Not that one.

Bob Martin: So if Doug can't do it I'm not going to be able to do it. All right? But we hear what you're saying and we'll make a note of it. By the way, we – many of the changes that you see us making in Express are – some of them are mandated. We have to do it because of legislation. Some of it we do because you've asked for it. So if you have a suggestion – when I was Direct Loan cam working out on campuses with schools I saw schools using Express in some very ingenious ways that I would have never have thought about. So we know you have good ideas. So if you have a good idea on how to improve our products then Jody and I want to hear from you. We're not offended if you don't like something. Somebody told me yesterday they thought our award tracking letters, tracking letters, document tracking letters and award letters were horrendous.

Female: They are.

Bob Martin: Yeah, okay. *[Laughter]* So we're going to look at that. I don't know if we can fix them or not but we're going to look at them. ED Express is free to you but it's not free. It costs a lot of money to produce it. So we have a budget that we have to work in and sometimes a lot of the improvements we would like to make we have to put on hold because of mandated legislation that we have to do. But most of the changes and improvements that you've seen have come about because of suggestions from you all. So keep the cards and letters coming, please. Jody.

Jody Sears: Thanks Bob and good afternoon everyone. This is, I think, is the last session of the day. So we stand between you and dinner or

Disney or something like that. All right, I have a question to ask. One of the things I'm going to talk about is a unique feature of ED Express which I think is actually kind of another way to make ED Express work more for your unique school. How many of you have ever created user defined fields? Okay, you don't count. You're from Vangent. Okay, one, two. So two out of this whole room have used this unique feature.

So I want to give you and overview and discuss how it can be used. I'm going to explain how user defined fields are created and then after I do all that explanation we put in a practical application of how you could use user defined fields. Perhaps you haven't actually thought about this usage or weren't aware that it was actually in ED Express. So be thinking about something that is unique to your school.

Where I came from many moons ago I came – I was originally from Chicago and we tracked certain things regarding Cook County and things like that that were just unique to our school, not something that you'd find on the ICER or anything. So if there are things in your school that you track that's only about your school or about your area user defined fields may be a thing that you can use that you might not have been using. I suspect that even among expert users there is power in ED Express that you've not yet unleashed and we're hoping that we whet your appetite to think about some of those things.

All right, you can add your own user defined fields to application processing of the Apps module packaging to loans and also to grant records. ED Express stores these fields in your user database. These fields are queriable. So once you create these fields you can actually include these fields you created into queries so that you can run reports or select records. You can populate the user defined fields that you create on student records individually or you can also use multiple entry. So of course if you create the field you have to have a way to populate the field. Then you can use it in a query and then run reports to pull out those specific records.

One thing to note though, once you create a user defined field you can't modify it once you save it. The only thing you can do at that point is delete it so long as it's not attached to a query or something that you've already created. If you delete a user defined field than any values you would have populated on student records would also be deleted but that's probably what you would have wanted anyway.

When creating user defined fields you'll see a small grid with columns and I'll show you a screen shot of that in the next slide to create the fields. The first column is entitled field and that's where you enter the name of the user defined field that you want to create. The next item would be – or the next piece that you would need to identify is the type of data this user defined field is going to collect. When you identify the type of data and that's why I wanted to spend a little bit of time on this we'll understand or ED Express will understand what the valid values would be for the type of data that you identify.

For instance, if you create a user defined field and you want to collect a date in that field you identify the data type as date. We automatically know then how long that field will be. It will only alpha characters. If you define the field as numeric we'll allow ten character spaces that only allow for numeric entries. If you define the field or data type as text we'll allow for 40 bytes and it can be alpha-numeric text or you can identify a user defined field to either be yes or no. It would be a one character field for Y or N. The one thing I want to just put out there is if you create a user defined field as Y or N that's a nice simple one but when you add it to a query the value would be true for yes, true for Y, false for N.

This is the screen shot I was referencing earlier and this is what it looks like when you are actually about to create a user defined field. Someone in our class yesterday actually brought up a very interesting point and I'm glad she did because I'm going to share it with you. When you first go to create a user defined field you'll go to tools, set up and of course this is a global function. We've circled in red user database. When you click user database you get a little warning box that tells you you're about to alter your user database.

Of course everybody stops at that point because they're afraid to do that. What you can't see is a little line that says, "Do it. Do it. Click it. Go ahead. You're not going to ruin anything. Go ahead and say okay to that." But I think that's what stopped a lot of people is as soon as you saw the little warning box you go, "I don't want to do that." It's okay. You are altering the user database. You're creating a new user data field and it's okay.

The other thing I wanted to point out is as you create each line you'll notice I mentioned field type. You'll see type there in the length and the description which you'll also provide the description. You'll be able to enter – when you click an add for the first time the first line is available to you. When you want to add your next line you just click the add button and you can continue to add up to 200 user defined database fields. I don't know that anybody's done that but you've got 200 to work with. Just to advance from field to field you'll use arrows instead of tab keys. Just another little FYI.

All right. Once you've created user defined fields you have to have a way to populate them. You could go into each individual student record and click on the user data tab when you open that student's record and you'll see a listing when you click user data. You'll see a listing of every user defined field that you've created and you only need to populate whichever ones apply for that student. You certainly can do it one at a time on a manual level. It's probably a little more efficient to use the multiple entry and we'll talk about that in just a moment.

Male: Jody, question on that, the field ______ _______. Can you set up a list of values that you select from when you're setting up that field or ______ values or anything like that?

Jody Sears: Okay. I'm going to repeat the question. When – what you're asking me is when you create the user defined field and then you identify the data type that you're collecting you're essentially establishing valid values at that point like date or text or whatever.

Male: Well except that if you want a specific list of values, say there are four different values that would populate that field it's –

Jody Sears: No. It's – you can – if you set it up as a date you can enter whatever date you want. If you set it up as Yes/No it's either Y or N. If you set it up as text or numeric it just knows to accept text values of alpha-numeric up to 40 characters or numeric only values up to 10 characters but as far as – so you have to establish what it is for that. But I think once you establish the name of the field and then you'll notice there – Amy go back one slide. You'll notice that you'll also have to provide a description. That description should be your key to know what it is you're entering into that value. Okay, thank you for the question.

Okay, we're on slide 25. All right, let me catch up my spot. All right, if you have a lot of records that you want to update with specific user defined field values then you'd want to use the multiple entry function. As Bob mentioned earlier this function allows you to update any of the user fields that you've created for your students that you select at the same time. Bob explained a little bit about how the multiple entry function works but just know that with multiple entry you can use the selection criteria and then you'll see a select records button and you can select individual records that you want to update. You can also use queries to select records. You can – there's just a number of ways or you can choose to update all of your records. So you have a lot of flexibility using multiple entry.

You can also import the values for user defined fields from another system. How many of you have another school system that you use in combination with ED Express? Wow. Okay, that's about 30 percent of the room, maybe more. How many of you when I say you have a school system and you use ED Express how many of you are actually communicating those two systems, communicating with those? Okay, less than the first of the hands that went up. I'll just stop here and give another PSA like I've been doing in a couple of other sessions.

If you are doing dual entry, in other words you're making entries in your school system and then you're going into ED Express and you're entering similar information a second time you're certainly introducing the component for human error when you're entering the same information two different times. ED Express provides technical references for you, an EDE technical reference and a COD technical reference that provide record layouts that you can create from your school system so that you can import that information into ED Express. That will certainly save you time once you have your technical staff help create those. Certainly CPS Customer Services has helped schools in the past be able to do that if you need assistance beyond the technical references but that will you lots and lots of time and certainly make you more accurate.

Female: Could we use a spreadsheet to create multiple entries?

Jody Sears: The question is, "Can you use a spreadsheet or Excel to create multiple entry?" In other – I'm going to say no but there is something that you can do. There is a way and this is in the desk reference I believe and I'm going to look at Paul. I beg you to tell me if I'm wrong if this is in the desk reference or not. But there's something you can create called an SSN file and I think it's like a simple out of word pad or text pad. I'm sorry. Text pad.

Male: All three of them.

Jody Sears: All three of them. All three of them will work. All you do is create a list of SSNs. You simple type the SSN, enter, SSN, enter, SSN and you can just create that out of word pad or something like that and then you can use that for multiple entry. You'll see a little SSN file button in multiple entry. Click that SSN file. It'll say, "Where's the file you want me to find?" You browse to find it and pull it in and that will pull all the SSNs within your ED Express database to select for multiple entry. So that's actually a good question. If you'd like to see – if you guys are interested in what I just described if you come to the session 13 anybody who's assisting in that session I'm sure from Vangent and the FSA folks can show you how to do that. It's simple and it's quick and it's a pretty cool feature. So thanks for asking.

All right. I believe I left off talking about external add as another way that you can populate your user database. So if you do external add from your school system into ED Express that's another way where you can populate those user defined fields. Also you can go to print global user data to print a report of the user defined fields and values. So that might more address your question as well.

All right, now to the practical application. If you've never used user defined fields before you can't quite figure out how you could use them or make use of this we thought that this might be an example that maybe you could take and find a way to make it a practical example for yourselves. So let's say we use ED Express packaging module for our students and at your school you provide students with an academic scholarship that's renewed each year based on the student's GPA. So you have that scenario but there's no user field in ED Express that tracks GPA. So you could create one. There's not one that tracks if you're going to renew somebody's scholarship or not. So you could create a user defined field for that.

So your first step would be to go to tools set up, global, user database and add and you want to create or build those two user defined fields. So you would create the GPA user field and you would create it as a numeric data type. Obviously the user defined – or the value for that field is whatever the student's GPA is. Then you'd also create a renew scholarship user defined field and you could set that up one as a yes/no field, a Y or N.

Then your next step would be now that you've created the fields you need to populate them. So you could go to multiple entry and you could go to the global – process global multiple entry and you could populate those fields using the example I just gave. If you already have a list, say, from your academic office of all of the students who had the scholarship that you want to renew based on their GPA if you get their Social Security Numbers you can just create the list of all of those students that you received from your academic office and those would be the ones that you would be using in multiple entry to update the values of their GPA and whether or not you're going to yes or no renew their scholarship. Okay, so now you've got the – yes, sir?

Male: How would you create GPAs and multiple entries if they have different GPA? Can you have Google?

Jody Sears: You would have to manually type in each GPA because it's going to be different. What multiple entry does is save you from having to open each student record, go to the user data tab and type in that GPA number. When you to multiple entry you see the list of all of the students and you would have to have the list of all of their GPAs but you have to have a source for that information anyway. So you just have to enter it out of the list instead of opening and closing one student record at a time. So that's where the savings is. Great question. Thank you. Yes?

Female: So in my internal system if I can –

Jody Sears: Could you – I'm sorry. Could you go to the mic? That'll save me from having to repeat it. Thank you.

Female: Sorry. So in my internal system if I can sort a list of students with their Sosh Number and their GPAs and say print all and then export those into like you said the text file either through word pad or whatever and then use that to dump, for lack of a better word, into ED Express then I could enter in groups of people with very little – so that I'm not typing in every Sosh Number because I did that for a long time and then that gets old.

Jody Sears: You're right.

[Crosstalk]

Female: But I could do that.

Jody Sears: What you're talking about is finding a way to actually pull that list into word pad so that you don't have to manually enter and you absolutely can do that. So you can take this as – that's a great point. Thank you for sharing that. All right, so where we left off is we created the user defined field. We talked about how we're going to populate the user defined field. Our next step would be to build a query. So you can create a query in ED Express. In this case you would create it in the packaging module using the GPA user defined field and using the renew scholarship user defined field. So now you've got – you've populated students.

So now you want to pull the students that have this user defined field that you've populated into a query and now you have a list of students who you know whether or not they're going to get their scholarship or not and then you can go into multiple entry for packaging, selection criteria, use your new query and then you're pulling up only those students that you want to be sure get that renewed scholarship. So without being able to do a big demonstration in ED Express I hope that gives you an idea of how you can use that on your campus. Perhaps you have a way where you can track some things that are just unique to your campus using that function.

All right, the next item I'm going to talk about I'm going to guess more of you use regarding prior year data. How many of you use a prior year import? More people but not everybody. Okay. This is another one of those things I think people might get fearful using. When you install ED Express for the first time what's the box you see? Oh come on.

Female: Bring up selections.

Jody Sears: Yeah. Do you want to use prior year import from last year? How many of you click later or don't ask me anymore? Yes. Okay, there's a real distinct advantage of using prior year import but what I want to talk about here is maybe a little more detail about what happens in prior year import and help you understand how much flexibility you have in using that. A lot of work goes into creating the individual user set ups that you make particularly if you use packaging that's huge.

If you're – there's at least no one person in here who's using packaging and the majority of packaging effort are the set ups. Packaging is pretty quick but it's the set ups that take so long. So you certainly don't want to have to reenter that information. You don't want to have to rethink and reenter. But your dispersment profile codes and your Direct Loan set ups, your Pell set ups and the user defined fields that you've created, any of the queries you've created you don't want to have to rethink and reenter those.

There are three types of prior year imports that you can decide to use when you install ED Express release one and then again in ED Express release two which is the loans and grants module. If you're prior year user defined query set ups and file formats – all the setups for every module haven't changed other then the dates you can import the data into ED Express choosing the prior year user defined query set up and file formats import type in the import dialogue box. Just a think about the dates. When you import prior year items from a previous year into the new year software and it has dates like your dispersment profiles they're not usable until you update the dates so that they're appropriate for the new year software and that's true for anything including user defined fields that might be date specific or any queries that you have that have user specific dates in there if they're not appropriate for the next year they'll import but they won't be usable until you update the dates.

When you choose to import prior year data into each of the three categories we've just mentioned you'll see an import dialogue box open that will allow you some flexibility to select which data records or files you want to import. You don't have to import everything. You can really fine-tune what it is you decide to import. So when you install your new award year version of software for release one you automatically see that pop up box I had mentioned earlier for global apps and packaging modules of the previous year's software. Then later when you receive release two software you'll have the opportunity again to use prior year import for the set ups that relate to the loans and grant modules.

As we mentioned you can select to use prior year import. You have a lot of flexibility to select which records within each module that you want to pull over. So you don't have to pull them all over. Here you can literally check off which ones you do and do not want to pull over. So you – not only from the module but individual pieces from within the module. So it allows you a lot of flexibility and control when you do this kind of an import.

As experienced ED Express users you know that we make changes to the software every year. So sometimes the changes that we make were like the ones that we described this morning. We're removed some ICER data elements that existed in 10-11 in 11-12. So let's say that you created a query that uses enrollment status from the ICER. If you have a query that uses that particular field and it doesn't exist in 11-12 that query won't pull over because that field doesn't exist. In any of your set ups where something like that doesn't exist in the year you're pulling it in you won't be able to pull that over. At any point in time that you have a failure to pull over an item you would have expected to pull over you'll see an import edit report at the end of your prior year import that lets you know what didn't come over and why that import failed so you have some idea of what didn't come.

Another point to remember is if you attempt to use the prior year import and you've already entered a code in your software say for file formats. If you don't do prior year import right away and you do some sets ups in your new software before you do prior year import and you enter a code, say a dispersment profile code or a file format code and then you try and do prior year import if you've already used a code that is in prior year import it's not going to come over and overwrite something you've already entered in. It's probably something that most of you wouldn't do anyway but it's just a caution I wanted to point out. .

I'm going to go onto the next slide because I've already said that point twice. We've talked a lot about prior year import or talked a lot about prior year inquiries set up – prior year queries. I'm sorry. I'm getting a little dry mouth here. Set ups and user data but you can also import prior year demographic data. You choose this import type to import student demo data from your prior year ED Express database into your current year's database. The records are moved according to the criteria that you specify. So you don't have to pull over all of your demographic records but maybe you'll only want to pull students that are enrolled for the next 11-12 award year.

That might be helpful, for instance, I would think if you were like a borrower based school where you have rolling start dates and you have students that – the example I was thinking of in my head is the school I was at had four start dates. I had a class that started in April or one year, say April of 10-11. So that would be one of the classes that I would want to pull over or I guess October of 10-11 and they don't finish until October of 11-12. So that would be maybe their demographic data I would want to pull over in 11-12.

That would be an example of how I would want to construct which demographic records I pulled over into my new year's software. One of the things that I wanted to point out about that is if you move over demographic data to remember that if you've entered some information in your 11-12 software and then you try and pull over 10-11 data if an SSN exists in your new software it's not going to overwrite. That particular demographic data won't pull over. Again, you'll get an import/edit report to let you know what records did not come over in your prior year import for demo year data.

When you select prior year demo data you will have an option to select records in the import dialogue box which I mentioned and – why does this feel like I just said it? Oh one other point I wanted to mention on this is when you pull over demographic data from the previous year and you have the entrance interview check box that information will import over to your current year software, the 11-12 software but the entrance counseling date will change to be the current system date when you do that prior year import. Just another little piece of information I thought you'd want to know.

In order to import that values of user data fields you've created from a previous year the user data fields must exist in the new year software. So make sure that you import your user data fields first. This import type imports user data values from your prior year ED Express database to your new database. Just like importing prior year demo data records that move according to the criteria that you specify using selection criteria and the select records function.

One more thing I wanted to point out. This screen shot is demonstrating an import dialogue box for the prior year user data. When you select prior year user data and click okay a second dialogue box with a grid is displayed so that you can choose specific records that you want to import. If you select the overwrite existing user data check box you can overwrite existing user data into your current year software. Okay, that was probably more information and more detail about prior year import than you currently had. If you don't use it I encourage you to use it. It does save you some time. I'm going to transition to Bob.

Bob Martin: This is the part of the session that I enjoy because I get to talk to you about stuff we're doing, changes we're making. I know sometimes change is difficult but it's difficult for us. But a couple things I wanted to mention. First of all, it just dawned on me I'm being filmed. So if I offended anyone in this room or anyone in the administration I'm really sorry about that.

[Laughter] I had a lady come up yesterday in this session and she asked this question. Remember the lady that said, "Why can't I originate online?" So I'm going to repeat this. We put this – we've put it in the user documentation and I asked again just recently Tad Paulson, the guy who writes the – our technical documents for us or the user documents for us. I said, "We need to bold this somehow." If you're going to use ED Express to process

financial aid then do not originate online at COD. You can do that. You can originate online but you have nothing in your ED Express database to sync up with.

So here's the admonition. Originate in ED Express. Make sure COD gets it and accepts your origination record. Then if you need to work online at COD, you're up there doing something else and you decide to make a dispersment then that's fine because you have something back in your database on campus that the dispersment response will import to and will sync up with. So just a little caution there.

I know that because of the foreign schools that are coming in they had to have a tool. I happened to be on the project. They had to have a tool to be able to process Direct Loans. We looked at Express initially and that was rejected. Then we looked at building and online tool which we did then they came back to me and said, "Do you think Express can do that?" I go, "Sure." But we do – there is a new Direct Loan origination tool online at COD and it's for primarily foreign schools although domestic schools can use it but if you're going to use ED Express stay away from that tool. Use ED Express first. Then if you need to do something to that loan record go up online and do it and you'll be fine. That's one thing.

The other thing is the changes that we're making. Now I'm going to talk to you about a few of the changes that we're making but I'm going to show you a list here. This is a five page list of changes we're making in ED Express release one and release two and I already have a release three coming out. The reason we're doing that is because remember that we are reactive to other systems particularly COD. So if they make a change in their system then I need to make a change in the software so that we're all in sync.

The problem is that they're on development schedule and I'm on a different one and it takes time to get that work done and it takes time to test that work. What's the change we're making and it's going to take forever to test? I'll think of it here in a minute but we're making a very minor change but it's a – oh I know what it is. It's 508. We're making a change. We are – does anybody here not know what 508 is? Okay, it's for assistive – what's the term?

Female: Technology _______ ______ ______.

Bob Martin: Assistive technology, right. It's for people that are unsighted or poorly sighted and we have in there something called high contrast. So people with bad eyesight can turn this to high contrast and they'll be able to see those grids a lot better. We have to make those changes to our software so those folks can use it. When we – but we test it every release with those people because those are actually people who are blind who are doing this and they're telling us what the problems they're encountering. Then we make the change.

One of them was that high contrast grid. It's not a huge change. The problem is that we have to test every grid in ED Express to make sure that high contrast works and that takes time to do. So little changes create lots of work and there's only so many hours in a day. Some of these changes that we've got illustrated here I'll talk you through and I'll tell you something that I don't have illustrated that have been new.

The other problem is of course is that if you work with software of Websites you know that there is like a life cycle and in most instances you have what's called a requirements period. At this date requirements are done. It doesn't matter what – because we need time to develop what our requirements are. The problem is that we're getting so many changes mandated by Congress we don't have that cutoff date anymore. Congress says, "Get it done by July 1," we have to get it done. So it seems like we're always in a process of requirements so things are being added all the time and it's very difficult to keep up with it. Amy does a spectacular job doing that with ED Express and DL Tools product.

One of the big changes we're going to make is we're going to drop that first dialogue box, the top on there that you see when you want to open a record or create a new one and we're going to put it the toolbar above every record and every module. That will save you a couple of clicks plus if you're in a record and you suddenly decide, "Wait a minute; I need to make this change to Jill's record," you can pull Jill's record up, too. Now if you made a change in the first record the software will prompt you to save that change before you jump into Jill's record but it saves you a couple of clicks.

Another big one that we're doing is multiple loan types in a single import. Now if you create a loan record you have to create one type, a sub, and then save it or originate it and then go out and click the add button again and create the unsub. Now we're going to let you do all that at one time. You can do it upon import.

Female: Yea.

Bob Martin: I'd like to tell you that I thought of that myself but one of you told us to do it or through something at me and I said, "Let's do that." So we're going to do that and you'll see that the visualization here is on the import for loan data ICER which means we're moving ICERS into the loan package to create loan records. We'll check the boxes for the type of loans that we want to create. If you're using packaging and your packaging process has awarded loans to these students and when you move data from the packaging module into the loan module if you have not designated which loans you want to create Express will read what was awarded to that student in packaging and then automatically create those loan records. So that'll save you a few clicks there.

We – it's been mandated that we have to capture the ability to benefit information and so we've added five new fields. We're going to put those on the demo tab because that's the only space we have. Not only do we have to capture it but the regulations say that we have to report it at the program level. So if you have a student that's eligible for one of these awards or loans based on ATB and each time you send from Express a record to COD for that student we will pick up those five fields for ability to benefit and send that on to COD. It's going to be redundant but that's the way we have to do it.

If you've ever added ATB data to a student's record and then you removed it Express remembers that you had it there once and we'll keep sending it even though you don't see us doing it. It's behind the scenes. We'll, like the last bullet says, we'll just reorganize demo. Now if you're used to the loan origination page where you have a box and you have some tabs at the top so you can get the Plus data and financial data and that kind of stuff that's the way the demo tab is going to look.

Let's talk about Plus application acknowledgements. Those are the CRSP files that come to you from COD via StudentLoans.gov because some parent went out to StudentLoans.gov and executed a Plus application. We got that up quickly and now we're trying to refine it. We had to get it up quickly and we probably could have done it a lot more artfully but when you're in a hurry and you need to get something, a product out there you don't always get to put all the bells and whistles in that you would like. That's what happening. So now we're going back and retracing our steps and making it a little – refining it a little bit and adding some – enhancing some of the capabilities there.

The Plus application acknowledgment fields are displayed on the Plus and Grad Plus loans on the Direct Loan origination tab and we're going to have to put the transaction number in there because as you know we have to capture that with Plus loans now. Print dialogue box for the NPNs and for the disclosure statements. You have the option now of printing those with Spanish labels if you serve a large Hispanic population and need that capability.

Import edit reports, you know there's a post 9-11 for dependents. Jody was talking about the DOD match this morning in the general session. There's a post 9-11 for dependents of folks who are deceased as a result of their service in Iraq and Afghanistan and if they're Pell eligible we're going to award them the maximum Pell eligibility but if they're not Pell eligible we're going to make them eligible by virtue of the Iraq/Afghanistan Service Grant, IASG. You'll see that. We're going to give them Pell and we have to be able to handle that. That's going to be all done online just like the post 9-11 grants are handled and you won't see anything in Express with the exception of a couple of things.

In the NSLDS data a portion of the ICER you'll see – what is it – the overpayment flag and the contact. You'll also see the import edit reports will be updated to print indicator that there is an Iraq and Afghanistan Service Grant included in the file and you'll see that on the CRWBs that come out of COD. Also the Pell year to date file. Let me go over to my – lots of little changes that we're making in the prior year import. Did you talk about the ICER Enrollment Status?

Jody Sears: I mentioned _______ -

Bob Martin: Enrollment status has been removed from the FSA. We always had something called ICER Enrollment Status and we've had to remove that so we'll have to change the software to remove that field. If you have it in last year's and you're trying to do a prior import that's not coming or it will come over but it will – enrollment status will be flipped to full time for packaging. Right. For new high school data elements we had a pilot project last year of 20 schools capturing high – who have access to the data, capture high school data. We're going to expand that to 100 schools I think it is now. 100? 200?

Jody Sears: Oh yeah, that's right.

Bob Martin: 100 schools now. So you'll see new data elements in there. One new FAA info high school flag will be there for you. Interested in work staying loans? We dropped the loans so we have to change the software. A couple of interesting one that you may be interested in. I mentioned to you that I'll have a third release. I think March 28th we'll come out with release two which is your grants and loans and then – tell me – help me.

Jody Sears: June ______.

Bob Martin: June 17th we'll come out with release three. I'll tell you what's going to be in release three. This will coincide with COD release 10.1. COD will come out with 10.0 in February. We try to line up with their releases but we just can't do it all the time. So you may see some lag in some of the functionality they have versus what you have in Express but we'll eventually catch up to it.

In release three we're going to put the Iraq/Afghanistan Service Grant, overpayment flag and contact in that Web based and import edit report and then there's a Pell – there's an IASG electronic statement of account also coming out as well. So we'll put that new message class in there. The credit info tab on the Plus Loan will have new fields to display. Award range, start and end dates that's coming out of COD or StudentLoans.gov. That's going to be set up that you do in there or stipulate and we're going to feed that to you. Six month deferment option, school credit balance option, Parent Plus only, citizenship, default, overpay code, Plus app submission reason, modify DL print to print Spanish labels and to display new fields on Plus origination and Grad Plus Origination.

Remember Edit 52? Does anybody know what Edit 52 is? We're going to retire that. Does anybody know what it is? Have you ever gotten it? You know in ED Express where there's a chip – put your hand down – where there's a check box. That's Gary. Gary Gavin had his hand up. He's the developer that actually writes the code for ED Express. So I expect him to know the answer. If he doesn't we're in trouble. But Edit 52 is a Edit that COD will pop if you try to send in a dispersment and it's got an earlier date than the date that you said was the first dispersment.

In Express we put a little check box in there for you where you could say, "Wait a minute. I made a mistake. I reported to COD that this was the first dispersment but I really meant this one was the first dispersment." You can check that box. Well that's going to go away. We're going to remove that box because COD from now on is going to read the earliest date as dispersment number one. So it's going to make it very simple. Why is that important?

Because interest accrues from those dates. So the earliest date is when interest is going to start accruing.

Previous application ID. One of the problems that we have is that with StudentLoans.gov it's generating an application ID which is displaying in ED Express. Well now we're going to allow parents to go back in or grads for Grad Plus and go back in and alter some information on that application. But they might say, "Well wait a minute. I told you I needed $5,000.00 but I really need $6,000.00."

So we're going to send that to you but we have to have a for syncing that up with what you already have on your database. It was not a battle but it was a process of education. Sometimes that's what it takes to let people know that there are impacts to what you do downstream. In this case we told them, "If you don't give us the previous application ID I have no way of matching that up with what's on the Express database." So they finally decided that they will send the previous application ID with it and we will take that and match it up with what you have on your database to update that particular record instead of forcing you to create an OO2 Long on a Plus change.

The other piece to that is a new change request that we've come in. You know that if you have a denied or impending Plus loan COD does not build that record on their database. They build a quasi record. Unless something comes in if there's a credit override comes back to you and says, "Oh no, everything fine," you can't send anything back to COD. They won't take it because there's nothing to match that up to. So they're going to change that so that they will accept maintenance records on Plus loans where there's been a credit override.

There is a new credit status of L which is coming and what that means is that your endorser is – this is only on for endorsed loans. It means your endorser is okay but the amount we're endorsing is lesser than the amount that you wanted. So therefore you can only disperse up to that endorsed amount. So we currently don't have that credit status of L in the software and we're going to build that in for you.

We'll change all the documentation to reflect all of that. Read the cover letters. When you get an electronic announcement from us that has a cover letter in it telling about the software changes read that because the changes are listed in there for you. Okay, I think that's – I think I'll stop there. Let me see. Let's talk about training. If you need some more training go to – come over to the – come over to – if you have a lot of questions we can't answer today come to the hands on session tomorrow. We'll talk. Go to the PC lab. Meet some of those folks. Several of them are sitting in the back of the room. Ask your questions there. They'll be happy to answer them. They're good at what they do. For training, I don't think these people need to know this. They already know this. Does anybody not know what IFAP is?

[Laughter]

Female: ______ sometimes _____ ______.

Bob Martin: Okay, 800-330-5947. Those are your best friends. If you have a suggestion e-mail me or Jody. If you have a complaint e-mail Jody but we'd like to hear from you. Some of these changes like one change that I heard everybody liked down here we – that came about because somebody asked for it. If you don't ask we're never going to do it. I have to prioritize what we can change because money is not infinite and it looks like it's going to get even shorter. So we're going to have to be very smart about how we spend our money and what changes we make. But if you have a good idea we want to hear about it. We'll take a look at it and if we like it then we'll try to get it in there. So at this point we have a few minutes if you want to ask questions. That's fine. Otherwise, thanks for showing up. *[Applause]* Thank you. Thank you. You're too kind.

[End of Audio]