

Jody Sears: - do some introductions. My name is **Jody Sears**. I am with Application Processing. With me is **Bob Martin** and he is the PC and Participation Management Manager for Application Processing. He works along with the crew from **Vangent** to develop the software and make sure that it gets posted problem-free every time we put out a release. I also wanted to introduce the staff in the back that will be supporting you with any questions that you're going to have as you go through the exercises. We have **Amy Akers** and **Sally Owings** and **Doug Baldwin**. They'll raise their hand. They're all staff from Vangent that have responsibilities related to customer service to being the development staff and leads for this product. We also have **Angela Smith**, **Bruce Honer** – I got it right – and **Anita**. Please say your last name because I cannot say it.

Male: **Olivancia.**

Female: Olivancia.

Jody Sears: Thank you. And **Chuck Herman** as well. All FSA staff, training officers and Direct Loan Reconciliation?

Male: On boarding.

Jody Sears: Direct Loan Onboarding. All right, so you have the best of the best help you're going to possibly have available to you to support you through these exercises. All right, I want to get to know you all as well. So I'm going to ask a couple of questions and this is helpful for the staff who is supporting you to kind of get a sense of how well acquainted you are with **ED Express** software. The first question I want to ask is how many here are brand new financial aid administrators? Okay, we got a good handful of brand new.

How many of you are from schools that are brand new to Title Four? In other words you just received – okay, we've got one set over here. That's important to note, too. We got one over here. How many of you are just brand new to ED Express? You're experienced financial aid administrators but you're brand new to ED Express? Okay, good.

The reason that's helpful for us is because we can kind of guide you on where you go with your exercises. For those of you in the brand new category starting with the global exercises will be the most important part. In our presentation I'll explain the global set ups are how you customize ED Express software to work for you. For others of you who are – have some experience with ED

Express and understand how to set it up I encourage you to look at some of the other exercises, Pell, Direct Loan and walk through some of those exercises. One other thing. I know that from other sessions related to ED Express I encourage some of you to come into this session for specific help on either building a query or understanding multiple entry or some other very specific questions. So if you're in this class and you're here for that specific help just raise your hand and let us know.

All right, enough with the introductions. What is ED Express? There's a number of you here that are new to ED Express, new financial aid administrators and it's a suite of software. I should say EDE Suite of three basic components. ED Express is probably the largest of those components and ED Express has a set of five modules that we'll explain in just a moment. But we also have Direct Loan tools and a tool that helps ED Express and non- ED Express schools be able to reconcile their Direct Loan disbursements and cash draw downs and also SSCR enrollment reporting. It's a very simple piece of software that allows you to import the student status confirmation report, be able to update enrollment status and be able to send that back. So those three pieces make up the EDE Suite software.

Let's talk about what is ED Express. ED Express has five modules. Release one, typically available to you every award year by the very first part of January. I think this year it's January 3rd? Be released January 3rd – contains the first three modules, the global module and then we also have the application or App Express module where you import the **ICERs** and the packaging module. How many of you are interested or actually use ED Express for packaging? Anyone? Good. Is there anyone in here who's thinking about using it, like to learn more about it? Good.

Go on to the next slide for me. Release two, which typically comes out around March, the middle to late March contains the Teach Grant module, the Direct Loan module and the Pell Grant module and that's where you're able to create your origination and disbursement records for those programs. We also mentioned that part of the EDE Suite product is Direct Loan Tools and that's a product that enables as I said ED Express and non- ED Express schools the ability to import a student account statement – I'm sorry. Is that right?

Male:

School.

Jody Sears:

School. I said student. School account statements which allows you to be able to reconcile with COD the dispersments that you've sent in against the number of draw downs and the amount of draw downs that you've received from the Department of Education to manage your Direct Loan programs. SSCR as I said allows you to import the students' status confirmation report. You make the updates of your student's enrollment status and then you're able to export that and then again transmit it to your teaching mailbox.

Okay, next slide. This part I want to actually linger just a little bit. I'm on a mission this year. I want to make sure everyone knows not only where the software is but where all the user documentation that helps you use the software. When you go to FSA Download you'll see – this is the homepage. This is what you'll see. In order to download things like ED Express, Direct Loan Tools, ED Connect which is a telecommunication software that you also have to use in order to transmit your data back and forth this is where you are able to obtain that software and be able to download it and install it on your systems.

When you download the software it also has desk references. Everything that we're trying to explain to you in all of the ED Express sessions are contained in that desk reference. That is just such a wealth of information. You don't know how to use queries? It has a section on how to build queries, everything from simple ones to complex ones. You don't know how to use multiple entry or you're a little afraid of it everything to understand how that process works is in those desk references. So I encourage you to go here, print it or get it on your desktop.

All right, then the second part. Just one more thing. I was going to go really quickly. The second part if technical references and guides. If you are – how many here are combination schools? You have a school system and you're going to use ED Express with your school system? Okay, there's a number of you. Under technical references and guides you'll see the COD tech reference and the EDE tech reference. That's where you get the record layouts so that you can communicate between your system into ED Express. I encourage you too to also have those available on your desktop.

Okay, next slide. Just you can go past that. I've already said that. When you go into software and technical references you'll – this is the next page that you'll see and these are how you are able to obtain the software and be able to download it. Once you click on the software that you want to see or that you want to download the

second screen inset comes up and that's where you see the install guide and all the cover letters. The cover letters tell you what's in that software or what's new in a particular release of software so you know why you're installing an update. Also the software's available for you to run an install from that point.

Next slide. We encourage you also to visit the PC Lab. If you have very school specific questions that you'd like to ask or that you'd like to get assistance with we have several staff members from Vangent and from FSA to support the ED Express area of the PC Lab. So please visit. For those of you that are brand, spanking new to ED Express and you're brand new FAAs I encourage you to **IFAP**. We have an ED Express Online Web Application so you can walk yourself and as well as other staff that may not have been able to come to this conference. You can go through that Web training and it gives you the experience of how to set up ED Express, how to create records, how to import ICERs and be able to go through the export and the import process and all along the way it explains all the steps that you're doing. It's a great training tool for yourself and for new staff.

Also I would encourage you to sign up for FSA Tech which you can do at IFAP. FSA Tech is like a community of people who submit electronic processing questions only. It's not a place for you to ask policy questions but if you have a question about using ED Express or a problem that you're experiencing the CPS SAIG staff will respond to your question and everybody whose part of the list serve gets to see the question and also the response. What we find too is that some other schools will respond to someone submitting a question because they've already experienced that and they've found work arounds for something that works uniquely with their school. So it's a real benefit to be part of that list serve.

If you need further assistance with questions, if you're just getting ED Express set up and something's just not working right for you or you've got a question this telephone number gets you to the most knowledgeable people about ED Express on the planet. They will be able to help you with that and their customer service is excellent. You can also submit questions via e-mail if you'd like and they'll respond to you via e-mail or they'll call you if the answer is complex enough that it's better to chat but that gives you two ways to communicate.

All right. As always we appreciate your feedback about this particular training, if it was useful for you. If you have other ideas of how it could be even better we're always ready to hear more and

you can submit those comments and questions to Bob Martin. His telephone number and e-mail address are available.

All right, just want to give you a few extra hints about using the exercise guide that you have next to you. There are several tracks in that guide. If you're an experienced user and you feel really comfortable with ED Express but you've never used Direct Loan Tools, for instance, or you want to see how to use SSCR look for those tracks and jump into those first. If you're brand new I encourage you to start with the global exercises first. If you're new to the Direct Loan, if you haven't used Direct Loan with ED Express we have a section just for Direct Loan exercises or just for Pell exercises.

So with that I encourage you to get started right now. Bob's going to release your computers so you can start the exercises. You should see the icons on your desktop to get into any one of the software and from this point forward if you have a question raise your hand and someone will be right there to help. Thank you.

[End of Audio]