

Bob Martin:

Welcome to Session 18. This is Direct Loan Tools and EDEExpress Hands On. How many of you are here just because you want to work through the Direct Loan Tools track? Okay. How many are here to work through EDEExpress? Okay, great.

My name's Bob Martin. I'm the PC Products Manager. It's my job to get these products out to you on time every year. Bruce Honer is my co-presenter. Bruce is a Training Officer in San Francisco. He also leads the team that creates the CBT's that you're going to be using in here today. I'll talk to you for a couple of minutes and then Bruce will come up and walk you through getting into the CBT's.

I want to introduce you to some people in the room here because you'll more than likely have contact with them throughout the year. If you haven't memorized the number 800-330-5947, please do. That's CPS SAIG Technical Help Desk. That's your first line of defense. When you get stuck using one of these products and you don't know what to do, call that number and they will talk you through it. 800-330-5947.

That's right, isn't it? *[Laughter]* Okay, I'm just double-checking. Great, I'm being videotaped and I have to check on the number. Those are just for you. They're not for applicants and students and borrowers. They're just for you guys. Their job is to help you get comfortable with the software and so on.

Some people in the back: **Wally Meyers**, one of the people you may talk to when you call that 800 number. Wally's been with Vangent – All these folks that I'm about to introduce you to are either ED employees or Vangent employees. Vangent is our primary contractor who helps us create the software, and then does our support work as well. They're great people and they know what they're talking about.

Standing next to Wally is my team member, Sarah Adams from Chicago. Sarah's a former FAA and she I comprise the PC Products team. Standing in the middle is Amy Akers. Amy is the Vangent Senior Project Lead for the EDESuite Products. That's EDEExpress, SSCR, and DL Tools. Amy and I have been working together since 1999, I guess, right? Or '02 – somewhere in there. It seems like forever, okay? *[Laughter]* I love ya, but it seems like forever.

Standing next to Amy is Doug Baldwin. Doug is one of the supervisors for the support team. He's the DL Lead and when the

front line folks can't help you then they'll come to Doug and Doug will figure out the solution to your problem. Standing in the doorway there, directing traffic, is my friend Kim Schreck who's a Training Officer in Seattle. Kim and I used to work together in Seattle years ago and then she came to work up in Washington for us for a little while.

And now she's back as a Training Officer in Seattle. So I asked her to come and help us out here. As we're going through this and you get stumped, just raise your hand and one of us will walk over and give you hand and one of us will walk over and give you a hand.

I just have a couple of slides I'd like to walk through here and tell you a little bit about these products. EDESuite, as I mentioned is a set of three pieces of software (let me see if I can advance this): EDEExpress, Direct Loan Tools, and SSCR. SSCR you may or may not have used at your institution. Some of you may use the clearinghouse to do your enrollment reporting, but that's what that software is for. That software, eventually I think, will go away in favor of an online or a web-based solution, but in the meantime, as long as it needs to be created then we'll make sure it's out there for you.

The first release of EDEExpress always has the global, App, and packaging modules in it. We try to get that out there on the first or second day of the year so you can start working with your applications. Release 2.0 has the Grants and Loans portion, and also the TEACH Grant. TEACH is in its own little module because it's a hybrid between a grant and a loan.

EDESuite, Direct Loan Tools enables you to compare and print the SAS in a readable format. Essentially what Tools does is it allows you to compare your database with what COD has for you. And where there are mismatches, then you figure out why there are mismatches. It's not so important that you reconcile to the penny every month. It is important that you know why you're not reconciling to the penny every month.

If I drew down a million dollars or I did a million dollars' worth of disbursements yesterday, and COD ran the SAS report midnight tonight, and I haven't yet sent in those disbursement records to COD, guess what? That SAS report is going to show you off a million dollars isn't it? But you know that's going to clear up as soon as you send those records in. That's the key. Do that every month and at the end of the processing cycle you won't be having

any surprises. The schools that get in trouble and then get jammed up at the end of the award cycle are those that aren't doing that religiously every month.

We give you the tools to do it so we hope that you'll learn how to use the tools here and then go back to your campus and use them. The software is located – and you can download it at any time. It's at <https://www.fsadownload.ed.gov/>. If you want to play with it at home just log on and download it, play with it, put some dummy data in there and play with it. But you'll see software and associated documents and then that's the URL for the same place.

Then when you click on that software and associated documents you'll see a screen that looks like this. You'll do the full install, download it, and then you'll have the software. For EDEExpress, folks, each time you get a notice from us that there's a new release – I do generally two releases a year, three if we didn't get the new Pell tables in to Release 2.0. And in the past couple of years we've been doing at least four releases each year.

But each time you see a notice through IFAP or through SAIG or whatever, that there is a new release of EDEExpress, you need to download it and install it. Do a custom install so you don't overwrite your database, but you need to do that because we've fixed something that's wrong and you need to have that to continue processing.

Many of you, I watch [finaidel](#) and I watch [fsatech](#) and I see where you're all of a sudden you're getting a lot of warning edits and rejects from COD. More times than not it is because you haven't downloaded the latest release of the software and that's why you're getting those edits. So watch for those announcements.

If you need some help while you're here – and this is what this is for. If you're brand new to this kind of work then you've got a lot to learn and you can start here. This session here will help you and then we have Session 10 for EDEExpress with what's new in EDEExpress. That's later today. And then we have Session 11. Chuck Herman, a friend of mine who used to be on my team, does this presentation for me every year. He'll talk you through a little bit more detail on Direct Loan Tools.

But that's a start, and then if you're doing something out at your campus and you want to figure out if you're doing it the right way or if there's a better way to do it, go to the PC Lab here on third floor and tell those folks, "This is what I'm doing now. Can you

show me a better way to do this?" There may not be a better way, but there may be. We ask everybody if they use multiple entry and very few people will raise their hands. Multiple entry will cut your work load in half if you use it properly.

So that's where you can obtain help. Here's that 800 number that I mentioned to you previously, and there's an e-mail address for them. There are our e-mail addresses. If it's a particularly heinous question, go to one of the other two. If it's an easy one, you can call me. *[Laughter]* With that, we'll be circulating if you want to chat. Bruce is going to come up now and talk to you about how to get into the CBT.

Bruce Honer:

Great, thank you Bob. This is a hands on training. So we're here to get our hands dirty. How we're going to do that is I'm going to help you navigate to our web-based training. The beautiful thing about this, and this is the first time we've ever done this, is that we're going to take you to our web-based training online and we're going to help you create a User ID and a password. And you're going to be able to take this back to your school and just continue where you left off last time and learn everything it is that you want to learn about these products.

What we're going to do is, once we get you on and we get you to the training modules themselves – Again, just as Bob had indicated earlier, we have all the experts in the back here and I'll be here as well. And so will Bob. Just raise your hand if you get to a certain part and you want maybe a deeper explanation or you're not sure what's going on and what we're telling you with the web-based training that we're providing you here. And we'll come up and we'll walk you through some things or explain some things to you.

Again, the idea here is that we are going to have one more session tomorrow. It's going to be at the same time, only I think it's going to be down the hallway a little bit further over here. So you're welcome to come back tomorrow if you'd like and ask us some questions and go through the process all over again if you want to look at another module. But then again, you could always take it back to your school or do it from home. It's all good still.

So what I want you to do, if you haven't done so already, is I want you to look at your screen and I want you to click on the Internet Explorer icon.

Audience:

Voices a problem that can't be heard.

Bruce Honer:

Excuse me? The screens are locked, okay. Ask this gentleman right here. He's going to fix that for us. We're going to unlock them. We should've thought of that beforehand. Okay, so here we go. It should be unlocked now, so go ahead, and click on the Internet Explorer and you should get your ifap.ed.gov. The idea is I'm going to help you navigate through this. This is the same thing you're going to do back at school or back at home, 'cause I know that's what you want to do late at night.

And I want you to notice that you have the little box there, the *Tools for Schools*, and this is going to be how you get to the web-based training for this product. Click on that. Then you're going to see the link down here that we have circled, EDEExpress, *EDEExpress Online Training*, web-based training (WBT). I want you to click on that link.

Now that also, I want you to just take note of that. That also brings you to the Direct Loan Tools. We might change the language of that link a little bit later on in the year here so that it's more explicit, that that is contained therein.

Audience:

[inaudible comment]

Bruce Honer:

You want me to go back another screen? Okay, again, it's in the *Tools for Schools* box. Yeah, you see that? Everybody okay? Now we go to that third link down that says *EDEExpress Online Training*. Then click on that link. You're welcome. I am going to kind of go through this really quick. I apologize for that. I'm not going to give you deep explanations 'cause it's really not necessary. But you'll see here, we want to look at the 2011-2012, the latest version of the online training that we have available.

Below that you'll see the web-based training or you'll see text only. Do not do the text only. We want you to do the web-based training here instead. So click on that link. Now what you're going to get next is this particular screen right here. For those of you who already have gone into the 2011-2012 and you've created your own User ID and Password, you can do that right now and go right to the modules.

For those of you who are brand new and using this software, this online training, I want you to do ahead and click on the *New User* link right now. And by the way, for those of you that are going to create your *User ID* and *Password*, this is where you're going to go ahead and when you get to this screen you're going to use that User ID and Password to enter directly in to the modules.

Now this is the screen that you have. We want you to go ahead and create a User ID and Password. Let's do it right now, okay? I'm going to encourage you, because I hate to admit this to our Vangent folks here, I think I have three User ID's and three different Passwords because I keep forgetting them. So I might want to encourage you to write that down somewhere so that you can use it when you get back to your school.

Go ahead and create your User ID and your Password. And I want you to go ahead and click on the *Log In* option. Now this next screen, this is information that we like to gather. I want you to go ahead and enter in what you do know of those questions that we're asking. If you don't know them, that's okay. We're not going to penalize you and keep you from going on to the web-based training at all, but I do want to encourage you to answer those as quickly as possible. If you don't know the answer right away, let's just move on, okay?

Go ahead and enter in or click on the data or use the drop-down boxes and use them according to however your school is defined, and then I want you to get all the way down to the bottom there. When you're ready I want you to click on the *Launch Training*. I'll give you maybe five seconds to do that. Okay, great, are we ready to move forward?

So we clicked on that *Launch Training*, and what you're going to get now is the web-based training that we have available to you. Now I want you to note really quickly here, we have these different modules right here. Okay? So we have the different modules, the *Overview Global Apps*. What you're going to do is you can click on the area that you're most interested in. It does not require that you go in a specific order.

So if you're interested in direct loans and how to set up maybe a COD disbursement profile, you would go directly to *Direct Loan* and then you'll have a whole list of different lessons that are available to you under *Direct Loan*. Although I do encourage you that prior to going to *Direct Loan* or *Pell*, I might encourage you to go into *Packaging* because those kind of really tie into one another. They play off one another quite a bit. Okay? Any questions before we begin? Excellent, let's have fun.

And don't forget to raise your hand if you have any questions. Everybody's waiting to help you. Okay? They'll run up and help you as you go along.

Audience: *[Inaudible comment]*

Bruce Honer: Yeah, why don't we go ahead and let this person show up. That's what's going to happen. You raise your hand and someone's going to walk up to you and help you out. Okay? You just do whatever you want, just have fun – if that's possible. Go ahead and raise your hand.

Bob Martin: Okay, how many of you that came in for the EDEExpress are brand new to financial aid or brand new to loans or brand new to EDEExpress? Okay, send me an e-mail, just to bob.martin@ed.gov, and I'll send you a little cheat sheet. It's called Bob's Eight Steps for Staying out of the Penitentiary. *[Laughter]* And it'll explain the cycle to you in layman's terms and if you understand those eight steps, you'll never have a problem. You'll understand everything.