May 2023 Updates

**TECHNICAL   REFERENCE
CHANGE TRACKING LOG**

Changes Made	Location
Volume 1	
Section 2 – Overview of Changes • Added Description of Edit 229 • Added Description of Newly-created Volume 4 (Campus-Based Schema) • Added Note of G5 to G6 Transition	Throughout
Volume 2	
Section 2 – Document Standards • Perform minor content updates, grammar changes	Throughout
Section 4 - Edits • Added Edit 229 – Pell LEU	484
Volume 3	
Section 1 – Pell Grant, TEACH Grant, & Direct Loan Combination System Supplement	
Updated "Overview" section to add new sub-section describing the integration of the now-discontinued DL Tools for Windows software's major functionality into the Direct Loan module of EDExpress 2023-2024. We also modified the "Organization of this Guide" section to note that all applicable content regarding Direct Loan functionality in Volume 4 of the COD Technical Reference is now covered in Volume 3. Volume 4 has been repurposed to cover the COD System's campus-based functionality.	4-5, 7
Updated "Enhancements and Changes to EDExpress for 2023-2024" introductory section note to describe upcoming EDExpress 2023-2024, Release 3.0. Also added new module-specific bullets describing related software enhancements being implemented in EDExpress 2022-2023, Release 2.0, including updates resulting from the integration of DL Tools into EDExpress, expanded field lengths in Pell and Direct Loan, and new end-of-entry edits related to the Student Eligibility Code field.	8, 12-16
Revised "Business Rules" section to update formatting of "2023-2024 Updates to Valid Date Ranges" and add clarification regarding valid end date for 2023-2024 Pell Grant disbursements. Also updated formatting of "Direct Loan Fields Required for Origination."	18-21
Updated "Direct Loan External Imports" section to add subsections regarding the new Direct Loan External Loan Reconciliation and External Disbursement Reconciliation import types, including .	47
Added new "Direct Loan School Account Statement" sub-section describing SAS import and report functionality merged from the DL Tools software into EDExpress. This new	65-71

sub-section includes guidance regarding new Direct Loan Cash Management import, entry, and print functionality.	
Revised "Origination and Disbursement Add/Change" section of TEACH Grant Appendix to add a note regarding new TEACH Grant end-of-entry related to the Student Eligibility Code field.	75
Section 2 – Combination System Message Classes	
In Direct Loan Message Classes section, added three new message classes for new external imports merged into EDExpress 2023-2024 from the DL Tools software: • DLEXCASH, associated with the Cash Detail External Add import type. • DLEXLOAN, associated with the External Loan Reconciliation import type • DLEXDISB, associated with the External Disbursement Reconciliation import type.	80-81
In COD System Message Classes Used by EDExpress section: • Removed the CRSU24OP message class associated with the Subsidized Usage System-Generated Response, which is no longer generated by the COD System. • Removed references to the now-discontinued DL Tools software from Data Type text associated with the Direct Loan School Account Statement and Rebuild File, which can now be imported into EDExpress.	82-84
Section 3 – Combination System Record Layouts	
Updated the Pell Grant External Origination Add/Change (PGEO24OP) record layout as follows: • Updated Processing Notes/Edits column for Ability to Benefit Completion Date (field #14) and Ability to Benefit State Code (field #17) to indicate the fields are now required if the Student Eligibility Code is 03 (State Process). All three fields are part of the student demographic record in EDExpress. • Increased the field length for Cost of Attendance (field #28) to eight bytes and revised the valid value range to 00000000-99999999. As a result of this length increase, we removed the one-byte filler field that was previously field #29 and renumbered subsequent fields accordingly. The total file byte size remains at 400 bytes.	90, 92
Updated the Pell Grant External Abbreviated Disbursement Data (PGAD24OP) record layout to revise the valid field content for Disbursement Number to indicate value must be a numeric value between 01-20.	107
Updated the Direct Loan External Import Origination Add (DIEA24OP) record layout as follows: • Added notes to valid field content for Ability to Benefit Completion Date (field #23) and Ability to Benefit State Code (field #25) indicating the fields are now required if the Student Eligibility Code is 03 (State Process). All three fields are part of the student demographic record in EDExpress. • Increased the field length for Loan Amount Approved (field #34) to six bytes. To accommodate this change, we decreased the field length of the filler field (#33) preceding Loan Amount Approved in the layout to three bytes.	114, 116
Updated the Direct Loan Origination External Import Change Field Numbers tables (sorted by field name and change number) as follows: • Expanded the field length of change field D007 (Action Amount) to seven bytes.	152-160, 164, 169, 173-175, 179-184

• Expanded the field length of multiple change fields to six bytes, including S029 (Loan Amount Approved) and the gross amount change fields for anticipated disbursements 1-20 (S039, S049, S059, S069, S131, S135, S139, S143, S147, S151, S155, S159, S163, S167, S171, S175, S179, S183, S187, S191).	
Updated the Direct Loan External Export (DEER24IN) table of fields as follows: • Removed note from Ability to Benefit State Code indicating field is not valid or in use for 2023-2024. • Increased the field length for Loan Amount Approved, Actual Disbursement Gross Amount, Actual Disbursement Net Amount, and Application Loan Amount fields to six bytes. • Increased the field length for Actual Disbursement Net Adjustment Amount to seven bytes. • Increased the field length for Anticipated Disbursement Gross Amount and Anticipated Disbursement Net Amount to six bytes.	187, 195, 198, 204-207
Added three new external import record layouts as a result of merging of DL Tools for Windows functionality into EDExpress: • Cash Detail External Add (DLEXCASH) – Enables the import of cash transaction detail data from an external source. • External Loan Reconciliation (DLEXLOAN) – Enables the import of loan detail data from an external source. Previously referenced as the Loan Detail External Add import in DL Tools. • DLEXDISB – Enables the import of disbursement detail data from an external source. Previously referenced as the Disbursement Detail External Add import in DL Tools.	209-212
Updated the TEACH Grant External Data Add/Change (TGED24OP) record layout to add notes to valid field content for Ability to Benefit Completion Date (field #30) and Ability to Benefit State Code (field #32) indicating the fields are now required if the Student Eligibility Code is 03 (State Process). All three fields are part of the student demographic record in EDExpress.	212
Section 4 – Combination System Edits	
In Pell Grant EDExpress Edits table: • Added edit 1600, which requires that the Ability to Benefit State Code and the Ability to Benefit Completion Date fields are non-blank if the Student Eligibility Code is 03 (State Code).	290
In Direct Loan EDExpress Edits table: • Added edit 4080, which requires that the Ability to Benefit State Code and the Ability to Benefit Completion Date fields are non-blank if the Student Eligibility Code is 03 (State Code).	301
In TEACH Grant EDExpress Edits table: • Added edit 5121, which requires that the Ability to Benefit State Code and the Ability to Benefit Completion Date fields are non-blank if the Student Eligibility Code is 03 (State Code).	305
Volume 4	

Section 1 – Implementation Guide for Campus-Based Schema: 2023-2024 • Creation of an Implementation Guide for CB Schema	Throughout
Section 3 – Document Standards • Creation of Message Classes Section for CB Schema	Throughout
Section 4 – Edits • Creation of an Edits Section for CB Schema	Throughout
Section 5 – Campus-Based School Testing Guide • Creation of a School Testing Guide for CB Schema	Throughout
Section 6 – Campus-Based Schema Test Cases • Creation of a Test Cases Section for CB Schema	Throughout
Volume 5	
Section 1 – School Testing Guide • Perform minor content updates, grammar changes	Throughout
Volume 6	
Section 1 – Glossary of Terms • Perform minor content updates, grammar changes	Throughout
Volume 7	
Section 1 – System Generated XML Testing Instructions • Perform minor content updates, grammar changes	Throughout