

# Overview

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# Preface

The *Electronic Data Exchange (EDE) Technical Reference* is designed to meet the reference needs of programmers and data processing staff who want to incorporate electronic Free Application for Federal Student Aid (FAFSA®) and correction functionality into their institutional systems. This technical reference includes information about record layouts, required edits, printing assistance, and reject messages that are applicable for electronic FAFSA records, Institutional Student Information Records (ISIRs), electronic corrections, and signature records.

The information in this technical reference can assist you in developing your own software or creating bridges between your own mainframe software systems and the EDEExpress for Windows PC software. We also explain how you can create bridges between your systems and selected Web site functionality provided by Federal Student Aid for sending and receiving FAFSA data.

The remainder of this section provides the following:

- An overview of the EDEExpress and EDconnect software products, which you can use in combination with (or in place of) institutional systems you develop to exchange information with Federal Student Aid's data processors
- A description of Central Processing System (CPS) input and output data files
- An overview of new and modified items in the 2020-2021 version of the *EDE Technical Reference*

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# Software Products

To facilitate electronic data exchange, the U.S. Department of Education (ED) provides three software products free of charge to EDE participants: EDEExpress for Windows, EDconnect, and TDClient.

## EDEExpress for Windows

EDEExpress is a financial aid management software package that ED provides to Title IV financial aid administrators (FAAs). With EDEExpress, you can manage Title IV student financial aid application data, package awards, and exchange origination and disbursement data with the Common Origination and Disbursement (COD) System for William D. Ford Federal Direct Loans (Direct Loans), Federal Pell Grants, and the Teacher Education Assistance for College and Higher Education (TEACH) Grants.

FAFSA and ISIR correction entry in EDEExpress uses embedded browser technology to provide an interface with the FAA Access to CPS Online Web site ([faaaccess.ed.gov](http://faaaccess.ed.gov)). You submit the data through the Web interface, and processed results are returned to your Student Aid Internet Gateway (SAIG) mailbox, also known as a destination point, which you can then import into EDEExpress.

Using this technical reference, you can create files of FAFSA data in the same format that the FAA Access to CPS Online interface uses to send data to the CPS. Some schools and agencies choose to send the data using EDE and import resulting ISIR data into EDEExpress for storage purposes. Then, they can also use EDEExpress data management tools and report functionality.

To enroll for access to the FAA Access to CPS Online Web site, go to the SAIG Enrollment Web site at [fsawebenroll.ed.gov](http://fsawebenroll.ed.gov).

## EDconnect

EDconnect is a Windows-based file transfer protocol (FTP) program that enables users to send and receive Federal Student Aid information electronically. Users collect data on their PCs or computer systems and transmit the collected data in batches through the SAIG using EDconnect. The appropriate Title IV application system receives the data, processes it, performs any required database cross-referencing, and returns the processed data to the user's SAIG mailbox, where it can be downloaded to the user's PC or system with EDconnect.

## **TDClient**

Transaction Delivery Client (TDClient) software is used to send and receive FTP data transmissions securely over the Internet using Federal Information Processing Standards (FIPS) 140-2 Advanced Encryption Standard (AES). Compression software is contained within TDClient, so separate steps are not needed in your send and receive scripts. TDClient is supported under several mainframe and mid-range operating systems. A list of supported operating systems can be found in the SAIG Host Communication Guide.

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# EDE Input and Output Files

## Input Data Files

Input data files are files that you create in your own system to submit your student FAFSA and FAFSA correction data. To be processed, these data files must match the record layouts included in the “Record Layouts” section of this technical reference.

### ***Electronic FAFSA***

After a student has completed and signed his or her FAFSA, a school’s authorized FAA can submit it electronically by entering the data on the FAA Access to CPS Online Web site or by transmitting it to the CPS in a formatted ASCII file. The CPS transmits processed FAFSA records back to the school’s mailbox as ISIRs in the IDAP21OP message class. (A message class is a group of records of the same type.)

The “Record Layouts” section of this technical reference contains the FAFSA Application Export Record Layout (EAPS21IN). Reject codes are found in the “Processing Codes” section. Procedures for handling rejected FAFSAs are located later in this section and in the “EDE Processing” section. The “Printing” section includes details on printing ISIRs.

### ***Electronic Corrections***

Schools can submit corrections to FAFSA data electronically by entering the data on the FAA Access to CPS Online Web site or by transmitting it to the CPS in a formatted ASCII file format.

You can find the Correction Record Layout in the “Record Layouts” section of this technical reference. Electronic corrections are submitted in the CORR21IN message class. Valid field content specifications for the fields that you can correct are found in the “Processing Codes” section.

Information about adding your Federal School Code to receive electronic data, making signature corrections, and using the Correction Record Layout is located in the “EDE Processing” section.

## Output Data Files

Output data files are the files you receive as a result of your submitting FAFSA or FAFSA correction data. You either receive a processed ISIR data file or a record level reject data file. The ISIR file contains student records that met the layout specifications expected by the CPS and defined in the “Record Layouts” section. Record level reject error files include student records that could not be processed because the format or the data in the file did not match the specifications.

## ***Institutional Student Information Record (ISIR)***

The CPS generates and sends an ISIR to each school listed on the student's FAFSA, in response to the following input:

- Electronic FAFSAs or corrections submitted by your school using EDE or FAA Access to CPS Online
- Electronic FAFSAs or corrections submitted by another school using EDE or FAA Access to CPS Online
- Web FAFSAs or corrections submitted using FAFSA on the Web or Corrections on the Web
- Paper FAFSAs or corrections to a Student Aid Report (SAR)
- Postscreening transactions from the National Student Loan Data System (NSLDS®) or the Department of Homeland Security (DHS)
- System-generated transactions created by the CPS to provide updated data, such as revised match information from the Department of Defense (DOD) Match
- Federal Student Aid Information Center (FSAIC) corrections as a result of a student correction request or for issues such as a data entry error
- FAFSA data entered by FSAIC through the FAFSA on the phone application process

### **School Codes Included in the ISIR File**

The Federal School Codes listed on the ISIR depend on whether you represent a school, servicer, or state agency; as shown below:

- **School** – For each student, you will receive one ISIR that includes your Federal School Code. All other Federal School Code and Housing Code positions will be blank. In addition, the Electronic Federal School Code Indicator and FAA Federal School Code fields will *always* be blank, and the Electronic Transaction Indicator (ETI) Flag field will be set to the ETI flag of the school receiving the ISIR.
- **Servicer** – You will receive one ISIR for each student with only one Federal School Code and housing code listed. You will receive multiple ISIRs for a student if he or she included more than one Federal School Code for schools you service. In addition, the Electronic Federal School Code Indicator and FAA Federal School Codes fields will *always* be blank, and the ETI Flag field will be set to the ETI flag of the school receiving the ISIR.
- **State Agency** – You will continue to receive ISIRs as you have in the past; all school and housing codes that the student listed on the FAFSA will be included on the ISIR.

The “Record Layouts” section of this technical reference provides the ISIR Record Description/Data Dictionary record layout. The “Processing Codes” section includes information on reject codes, the appropriate action to take in response to a reject code, and the comment codes associated with the reject. Specifications for printing the ISIR are in the “Printing” section.

### ***Handling Record Level Rejected Records***

If the specifications in this technical reference are not followed on a particular record, an EDE Record Level Error Report File is transmitted to you and can be printed as an error report. The error layout is in the “Record Layouts” section.

The EDE Record Level Error Report Import Record Layout contains the student’s Social Security Number (SSN), name ID, transaction number, last name, first name, the Federal School Code, the CPS Correction # (number) in error, an edit code, an error code, and a text explanation for the reason the record was rejected. Each field in error is reported in this file. If the record was rejected due to an invalid value, the CPS sends the actual value of the data received from the school. When a record has more than one field in error, the student’s SSN is listed more than once in the EDE Record Level Error Report File. See the “Processing Codes” section for additional details about rejects.

The following is a list of message classes for reporting errors:

<b>Message Class</b>	<b>Data</b>
CORE21OP	Electronic Correction Errors
EAPR21OP	Electronic Application Errors
SIGA21OP	Signature Record Errors

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# What's New and Changed in the *EDE Technical Reference* for 2020-2021

Listed below are the changes to each section of the *EDE Technical Reference*. For a complete listing of changes to the Central Processing System (CPS), including changes to database matches and system edits, refer to the *2020-2021 Summary of Changes for the Application Processing System* guide. You can find this guide, available later this fall, on the U.S. Department of Education's Information for Financial Aid Professionals (IFAP) Web site located at [ifap.ed.gov](http://ifap.ed.gov).

We revised the *EDE Technical Reference* for the annual rollover changes that include updating year references and adding, removing, renaming, renumbering, and updating the fields' start and end positions and valid content based on changes to the ISIR.

This technical reference has been updated to reflect the changes to the FAFSA process.

## "Overview" Changes

Here, we revised the "What's New and Changed in the *EDE Technical Reference* for 2020-2021" section to describe changes to the document.

## "EDE Processing" Changes

We revised this section to include annual rollover changes and updated the Signed Numeric Fields Table based on ISIR field name and number changes.

## "Record Layout" Changes

In this section, the record layouts for 2020-2021 were updated to reflect changes to the FAFSA and other system and legislative changes.

Each record layout includes a column called "Changes," which describes changes to that field; review that column for specific changes.

## "Processing Codes" Changes

### **2020-2021 ISIR Cross-Reference**

In this section, we updated the cross-reference to compare the 2019-2020 ISIR with the changes to the 2020-2021 ISIR record layout.

### **Table of Reject Codes and How to Respond to Each Code**

- We incremented the date of birth end-year references in Rejects A and B, which alert FAAs that the date of birth entered may be in error, because the student is older (greater than 75) or younger (less than 16) than most students pursuing a postsecondary education:



- **Reject A** – Date of birth year equals 1900 through 1945
- **Reject B** – Independent student and date of birth is on or after September 01, 2004, and the SSA match for the student is not equal to “4” (successful match)

### ***Transaction Reject Error Messages***

- We updated the year indicator in error 13 to “1” for 2020-2021.

### ***Assumption Overrides***

- We updated the tax year information and FAFSA question numbers in Assumption Override codes 5 and 6.

### ***Field Name and Position Cross-References***

- We updated the ISIR Cross-Reference Table to reflect changes to year references, SAR and FAFSA field names, field numbers, CPS correction numbers, and field positions.

### ***NSLDS Loan Program Codes***

- The NSLDS program codes did not change.

### ***Correction Data Entry Specifications***

We updated the data entry specifications to reflect changes to CPS Correction #, field names, and valid content, and to increment the year references where applicable.

### ***Message Class Changes***

- We updated the process year in all message classes from “20” to “21.”

### ***Comment Codes***

- The “Comment Codes” section contains no significant changes. For more information, see the *Summary of Changes for the Application Processing System* guide, which describes the changes to the comment codes and text, or review the *SAR Comment Codes and Text* guide’s “Changes” column. Both guides will be available on the IFAP Web site later this fall.

## ***“Printing” Changes***

The “Printing” section describes the ISIR printed from EDEExpress.

**Note:** You are not required to print ISIRs. If you choose to print ISIRs, you can print them from your own system or EDEExpress. You are also not required to print the ISIR output document exactly as the EDEExpress software prints it. For more information on printing ISIRs, refer to the “Printing” section in this technical reference.

Some ISIR field labels on pages 2 and 3 have been renamed, deleted, combined, or relocated. For a complete list of changes to the ISIR printed from EDEExpress, see the “Printing” section in this guide or the *2020-2021 ISIR Guide* on the IFAP Web site, located at [ifap.ed.gov](http://ifap.ed.gov).

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# Getting Help

## CPS/SAIG Technical Support

If you have questions regarding this technical reference, contact CPS/SAIG Technical Support. Federal Student Aid maintains this call center to address questions about CPS processing, EDExpress, DL Tools, EDconnect and TDClient software, SAIG enrollment and data transmissions, and to collect system enhancement suggestions.

800/330-5947; 319/665-4762; (TDD/TTY 800/511-5806)

Fax: 319/665-7662

Representatives are available Monday through Friday, 8 a.m. to 8 p.m. Eastern Time (ET).

E-mail: [CPSSAIG@ed.gov](mailto:CPSSAIG@ed.gov)

## FSATECH

FSATECH is an e-mail listserv for technical questions about Federal Student Aid systems, software, and mainframe products.

For more information on subscribing to FSATECH, go to [ed.gov/offices/OSFAP/services/fsatechsubscribe.html](http://ed.gov/offices/OSFAP/services/fsatechsubscribe.html).