

April 2020

RE: EDEExpress for Windows 2020-2021, Release 2.0

Dear EDEExpress Users:

Federal Student Aid is pleased to announce the availability of EDEExpress for Windows 2020-2021, Release 2.0. Release 2.0 adds Federal Pell Grant (Pell Grant), William D. Ford Federal Direct Loan (Direct Loan), and Teacher Education Assistance for College and Higher Education (TEACH) Grant functionality for the 2020-2021 award cycle. This release also includes major enhancements to College Financing Plan functionality.

About this Cover Letter

This letter includes the following information:

- Overview of EDEExpress 2020-2021, Release 2.0
- Login information for EDEExpress 2020-2021
- Important notices and reminders regarding:
 - Children of Fallen Heroes Batch Processing
 - Master Promissory Note (MPN), MPN Manifest, and Disclosure Statement printing
 - Pell Grant payment and disbursement schedules in Release 2.0
- Information regarding Release 2.0 enhancements
- Microsoft Windows compatibility and Section 508 compliance notices
- Contact information for technical support and additional assistance

EDEExpress users send and receive Pell Grant, TEACH Grant, and Direct Loan origination and disbursement data to and from the Common Origination and Disbursement (COD) System using the Common Record's eXtensible Markup Language (XML) format. The software converts the data to XML format automatically during the export process and can import files returned from the COD System in XML format.

Monitor the U.S. Department of Education's Information for Financial Aid Professionals (IFAP) Web site, located at ifap.ed.gov, for an electronic announcement in spring 2020 for information regarding the availability of the 2020-2021 COD System.

Important Note: Under certain limited circumstances, such as awarding the maximum full-time Pell Grant award to individuals whose parent or guardian died as a result of military service in Iraq or Afghanistan after September 11, 2001, you must use the COD Web site (cod.ed.gov) to originate the award. Otherwise, if you plan to use EDEExpress to exchange data with the COD System, we recommend you do not originate Pell Grant, TEACH Grant, or Direct Loan records on the COD Web site unless directed to do so by Federal Student Aid.

EDExpress for Windows 2020-2021, Release 2.0 Overview

EDExpress 2020-2021, Release 2.0 adds three software modules:

- Pell Grant
- Direct Loan
- TEACH Grant

In addition, Global functionality applicable to all modules, such as Security setup, Document Tracking setup, and User Database setup and entry is added during any installation of EDExpress.

EDExpress 2020-2021, Release 2.0 can be installed as an upgrade to Release 1.0 (posted in September 2019). You must have Release 1.0 installed to run an upgrade (or “custom”) installation of Release 2.0.

Reminder: Before upgrading to Release 2.0, ensure you have a reliable backup copy of your current EDExpress 2020-2021 production database (**expres20.accdb**).

To upgrade to Release 2.0, select the Stand Alone Custom or Workstation Custom option during installation, depending on your EDExpress operating environment.

If you have not previously installed EDExpress 2020-2021, you can proceed directly to a Stand Alone Full or Network Server/Workstation Full installation of Release 2.0. Be aware, however, that a Stand Alone Full or Network Server/Workstation Full installation loads a new, blank EDExpress 2020-2021 database to your system. If you have an existing 2020-2021 database, a Stand Alone Full or a Network Server/Workstation Full installation of Release 2.0 will overwrite your database and all previously entered 2020-2021 data will be lost.

For more technical guidance and information regarding the EDExpress installation process, see the *Installation Guide for EDExpress for Windows 2020-2021*.

Logging into EDExpress 2020-2021

If you upgrade from EDExpress 2020-2021, Release 1.0 to Release 2.0, your User IDs, passwords, and other security settings are carried forward to Release 2.0 and do not need to be recreated.

If you have not installed EDExpress 2020-2021 prior to Release 2.0, when you first access the software after installation, the default User ID is SYSADMIN and the default password is **\$y\$tem Adm1n**. Be sure to include the space between **\$y\$tem** and **Adm1n** (the two parts of the default password).

After you enter the default user ID and password, EDExpress 2020-2021 requires that you immediately define a new password for the SYSADMIN. New passwords must be a minimum of 12 characters and must include at least one uppercase letter, one lowercase letter, one number, and one keyboard character that is not a letter or number (such as an exclamation mark or other punctuation symbol). You can adjust the minimum password length and other requirements in the Password Setup dialog box (**Tools, Setup, Global, Password Setup**).

In addition, the SYSADMIN user ID only provides access to critical administrative functions in order to limit its use for routine software tasks and improve your ability to trace actions taken in the software to specific users. EDEExpress administrators at your school should create unique user IDs in Security Users setup with the necessary access (based on the associated Security Group) and log into the software under those IDs for most software tasks they perform.

For more information on security setup, see EDEExpress Help in the software and the *EDEExpress for Windows 2020-2021 Installation Guide*.

Children of Fallen Heroes Online Batch Processing Note

The COD System is updating its Web site (cod.ed.gov) for the 2020-2021 award year to enable batch submissions of student records eligible that are eligible for an increased Pell Grant award under the Children of Fallen Heroes Scholarship Act. Eligible students are dependents of a police officer, firefighter, or other public safety officer who died in the line of duty.

As a reminder, EDEExpress users should not originate Pell Grant records on the COD Web site. However, if you choose to enter data both on the COD Web site and in EDEExpress, you should take steps to ensure your EDEExpress database remains synchronized with the COD System:

- If you create the initial Pell origination record on the COD Web site, you must rebuild the record with a Pell Year-to-Date file or create a “shell” record for the student in EDEExpress before importing the corresponding COD Web Response file (CRWB21OP).
- Your "shell record" should include the same current SSN, date of birth, and last name for the student that you provided on the COD Web site to ensure EDEExpress can match the data in the CRWB21OP file to the record in your EDEExpress database.

MPN, MPN Manifest, and Disclosure Statement Printing Reminder

Direct Loan Master Promissory Notes (MPNs), MPN manifests, and Disclosure Statements must be printed outside of EDEExpress using a different onsite system or completed by the borrower online at the studentaid.gov Web site.

EDEExpress tracks the MPN status and other related information (such as the MPN expiration date) on Direct Loan records based on response data sent by the COD System. You can also indicate whether the Disclosure Statement has been printed.

For more information and guidance on the Direct Loan MPN, MPN manifest, and Disclosure Statement, see Volume II, Section 1 of the *2020-2021 COD Technical Reference*, which is available on the IFAP Web site.

Federal Pell Grant Payment and Disbursement Schedules in EDEExpress 2020-2021, Release 2.0

Federal Student Aid announced the 2020-2021 Pell Grant Payment and Disbursement schedules in [Dear Colleague Letter GEN-20-01](#), posted on January 31, 2020 to the IFAP Web site.

As noted in the Dear Colleague Letter, the maximum 2020-2021 Pell Grant award for a full-time student with an Expected Family Contribution (EFC) of zero is now \$6,345, an increase of \$150 over the previous maximum of \$6,195. The maximum Pell-eligible EFC is also increased for 2020-2021 from 5576 to 5711. As a result of the EFC increase, some applicants who were initially processed by the Central Processing System (CPS) as ineligible for a 2020-2021 Pell Grant award due to their EFC are now Pell-eligible.

The CPS began processing 2020-2021 application and correction records according to the revised Pell schedules on March 15, 2020. The CPS also reprocessed 2020-2021 Institutional Student Information Records (ISIRs) on March 17, 2019 for students who applied or submitted corrections before March 17, 2019 and, under earlier formulas, were designated as not being Pell-eligible, but who are now eligible for a 2020-2021 Pell Grant under the new formulas due to their EFC.

For more information and a complete description of the changes for the 2020-2021 award year, see Dear Colleague Letter GEN-20-01 and the [March 4, 2020 electronic announcement](#) posted to the IFAP Web site regarding implementation of the 2020-2021 Pell schedules.

EDExpress 2020-2021, Release 2.0 incorporates the 2020-2021 Pell schedules into the following functionality (listed by module):

Global

We updated the Pell Grant Schedule tab available under **Tools, Browse, Global** to reflect the 2020-2021 Pell Grant payment and disbursement schedules.

Packaging

We updated the Package and Repackage processes to award Pell Grants (Packaging Aid Type = **F**) according to the 2020-2021 Pell Grant payment and disbursement schedules.

If you create Packaging records by importing ISIR data, you should import any new ISIR transactions you received for student records impacted by the March 17, 2020 reprocessing into the Packaging module. This helps ensure the Pell Eligibility field on the Packaging record is set correctly. You must unpackage existing Packaging records at a Packaging Status of **P** (Packaged), **M** (Manually Adjusted), or **H** (Hand Packaged) before you can import new ISIR transactions. Before unpackaging these records, you may want to print the Packaging Record report for each student so you have a record of the funds you originally awarded to them (in case you need to recreate the awards).

After you import all reprocessed ISIR data into the Release 2.0 Packaging module, run the Repackage process for all Pell-eligible Packaging records, unless you already adjusted Pell Grant awards on these records prior to installing Release 2.0 to match the scheduled award amounts in Dear Colleague Letter GEN-20-01. The Repackage process will update the Pell Grant awards for your Packaging records to follow the 2020-2021 Pell Grant payment and disbursement schedules.

Pell Grant

We updated the Pell module's Calculate Award Amount for Entire School Year function, available on the Process menu from the EDEExpress main menu and the Origination (Pell Grant) tab, to follow the 2020-2021 Pell Grant payment and disbursement schedules.

Important Note: We anticipate that EDEExpress 2020-2021, Release 2.0 will be posted at least one week before the implementation of the 2020-2021 Pell Grant payment and disbursement schedules in the COD System. EDEExpress Pell users will need to delay exporting origination and disbursement information created in Release 2.0 for processing until the COD System is available.

Release 2.0 Enhancements

The following product enhancements have been incorporated into EDEExpress 2020-2021, Release 2.0.

Note: Some enhancements listed below were originally made available to users in Release 1.0. We are repeating the enhancements here for the benefit of users installing EDEExpress 2020-2021 for the first time. For more information on the 2020-2021 enhancements to Application Processing, Packaging, and Global functionality introduced in Release 1.0, see the *EDEExpress for Windows 2020-2021, Release 1.0 Cover Letter*.

General Changes

- **Updated Cycle References and Message Classes** – We updated software labels, help topics, reports, and other functionality throughout EDEExpress to reference the 2020-2021 cycle. Message classes with cycle indicators are also updated for 2020-2021 in File Management (**Tools, Setup, Global, File Management**) and in various Import and Export dialog boxes throughout EDEExpress.

Note: For more information regarding message classes used by the CPS in 2020-2021, see the Processing Codes section of the *2020-2021 Electronic Data Exchange (EDE) Technical Reference*. For more information regarding message classes used by the COD System in 2020-2021, see Volume III, Section 2 of the *2020-2021 COD Technical Reference*. Both documents are available on the IFAP Web site.

- **Updated EDEExpress Icon and Splash Screen Color to Match 2020-2021 FAFSA** – The EDEExpress software's Windows icon and splash screen (which is displayed when you first start the software) have been color-coded orange to match the 2020-2021 Free Application for Federal Student Aid (FAFSA®) form.

College Financing Plan Updates

Federal Student Aid implemented a new responsive-based format for the College Financing Plan for the 2020-2021 award year, which includes new data elements that provide a broader, more transparent view of the student's potential financial costs and overall college investment. The new responsive design of the College Financing Plan simplifies the document's design and format and removes some elements. It includes new fields defining loan interest rates, differentiates between need-based and merit-based scholarships and grants, enables comparison of on-campus and off-campus living arrangement costs, and more clearly defines the distinction between loans and grants.

EDExpress 2020-2021, Release 2.0 includes modified setup, import, entry, and print functionality that adopts the new College Financing Plan responsive design. Release 2.0 also discontinues the use of school-specific information and statistics provided by the National Center for Education Statistics (NCES) under the school's IPEDS Unit ID for the College Financing Plan. Instead, we have added a new School setup option specific to the College Financing Plan that enables you to define key address and contact information by OPE ID for each campus you create the document for.

The following enhancements related to the College Financing Plan are new for Release 2.0:

- **School Setup Added for College Financing Plan** – We added a new School setup dialog box specific to the College Financing Plan (under **Tools, Setup, College Financing Plan, School**). You must complete the new School setup for at least one OPE ID associated with your school or campus and assign it to a College Financing Plan Profile record before you can generate College Financing Plan documents for students. The new School Setup dialog box captures basic address, phone, and e-mail information about your school or campus, which is printed on the College Financing Plan document. You can create as many School setup records as needed.
- **College Financing Plan Profiles Setup Modified** – We redesigned the College Financing Plan Profiles dialog box (**Tools, Setup, College Financing Plan, Profiles**) to capture new and revised data elements associated with the responsive-based College Financing Plan template. In addition to existing cost of attendance fields, you can now define Housing and Meals costs by on-campus or off-campus residency. We also added fields enabling you to define the interest rate for various student loan types. The user-defined text blocks at the bottom of the dialog box, split into “Next Steps” and “Comments” sections, allow you to create user-defined text for the College Financing Plan.
- **College Financing Plan Dialog Box Updated** – We redesigned the College Financing Plan dialog to capture new and revised data elements associated with the responsive-based College Financing Plan template. Student and school information is captured at the top and top left of the dialog box. Separate sub-tabs on the left side of the dialog box now display EFC and cost of attendance (COA) data elements. On the right side of the dialog box, four new separate sub-tabs display estimated award amounts for different types of scholarships, grants, loans, and work options, with running totals for each category displayed in the sub-tab label. The bottom of the dialog box now displays separate text blocks for user-defined “Next Steps” and “Comments” text.

Important Prior-Year Import Note: If you created College Financing Plan records in EDEExpress 2020-2021, Release 1.0 before upgrading to Release 2.0, the database update process in Release 2.0 sets the records to an inactive status. We added a warning message to the Startup Information pane of the EDEExpress Desktop to alert you to inactive College Financing Plan records in your database. To remove the inactive designation, open the impacted records (by clicking **Open** under the warning message in the Startup Information pane), review the information on each record, provide any additional information necessary, and save the records to remove the inactive designation.

For more information on Release 2.0 enhancements related to College Financing Plan functionality, including an updated external import record layout, see the appendix of the revised *EDEExpress 2020-2021, Release 1.0 Desk Reference* posted to the IFAP Web site with the Release 2.0 software.

Pell Grant, TEACH Grant, and Direct Loan Valid Date Ranges

We updated valid date ranges for the 2020-2021 award year to synchronize EDEExpress 2020-2021 with the COD System edits and federal policy. The following valid date ranges are active in Release 2.0.

Field	Valid Date Range
Pell Grant Enrollment Date	10/1/2019 to 6/30/2021
Pell Grant Payment Period Start Date	10/1/2019 to 6/30/2021
Pell Grant Disbursement Date*	10/1/2019 to 9/30/2026*
TEACH Grant Enrollment Date, Payment Period Start Date, and Disbursement Date	On or after 1/1/2020
Direct Loan Date of Birth	1/1/1921 to 12/31/2012
Direct Loan Loan Period Begin Date	On or before 6/30/2021
Direct Loan Loan Period End Date	On or after 7/1/2020
Direct Loan Academic Year Start Date	On or before 6/30/2021
Direct Loan Academic Year End Date	On or after 7/1/2020
Direct Loan Disbursement Date (all loan types)	10/1/2019 to 12/28/2024

* Although EDEExpress accepts any date on or after 10/1/2019, the valid 2020-2021 date range for Pell Grant disbursement records is from the date the 2020-2021 Pell schedules are posted on the IFAP Web site to 9/30/2026.

COD Setup Enhancement

The following enhancement is applicable to COD Setup (**Tools, Setup, COD**), which contains setup features and options specific to Pell, Direct Loan, and TEACH Grant modules:

- **CIP Code Year Now Required in Program Profiles Setup, Defaults to 2020** – The CIP Code Year value, previously an optional data element, is now required by the COD System for the 2020-2021 award year and forward for all Pell, Direct Loan, and TEACH Grant records in addition to the CIP Code. We updated the Program Profiles setup dialog box to require a CIP Code Year value (in CCYY format) to save a profile.

Note: The National Center for Education Statistics (NCES) has released the 2020 version of valid CIP Code values on its Web site, located at <https://nces.ed.gov/ipeds/cipcode>. We recommend that you compare the CIP Code values you use currently against the searchable 2020 CIP Code database on the NCES Web site and, where necessary, update to the 2020 version of the CIP Code values for your 2020-2021 records. In Release 2.0, we updated the CIP Code Year field in CIP Codes Setup and Program Profiles setup to default to **2020**.

Direct Loan Informed Borrowing Enhancements

Direct Loan borrowers can now access Federal Student Aid's studentaid.gov Web site and review their outstanding loan balance or, if they have no balance, the average loan balance at the school they plan to attend. This online process is available to student (for subsidized, unsubsidized, and Grad PLUS loans) and parent (for PLUS loans) borrowers and is optional for the 2020-2021 award year.

The borrower's completion of the Annual Student Loan Acknowledgement process automatically updates the values for three new data elements (referred to as "informed borrowing" fields) on the COD Common Record, which are then provided to schools by the COD System. The three new fields are the Informed Borrowing Complete indicator, the Informed Borrowing Completion Date, and the Informed Borrowing ID.

The Informed Borrowing Response (message class CRIB21OP) is a new system-generated file sent by the COD System that provides informed borrowing field values to schools for all loan types. The COD System generates this file for reporting schools when new loans are linked to a previous loan balance acknowledgement submitted by the borrower (student or parent) or at the request of the school on the COD Web site. Informed borrowing information is also provided by the COD System in COD Common Record Response (message class CRAA21OP) and Web-Initiated Response (message class CRWB21OP) files.

You can import the Informed Borrowing Response into EDEExpress 2020-2021 using the Direct Loan module's COD Common Record Response import type. During the import of an Informed Borrowing Response file, EDEExpress attempts to match the data in the file to existing loan records in your database. If the software finds matching records, the import updates three new fields on the new "Inform Borr" sub-tab of the Origination (Direct Loan) tab with the information provided in the file. If the import process does not identify a matching loan record, the informed borrowing data is stored in the EDEExpress database for future use.

You can update the informed borrowing fields in EDEExpress manually on the Inform Borr sub-tab of the Origination tab. You can also add values to the fields using Direct Loan Multiple Entry or by importing a Direct Loan External Origination Add (message class DIEA21OP) or Direct Loan External Origination Change (message class DIEC21OP) file. Any informed borrowing data you enter manually on the Inform Borr sub-tab, update using multiple entry, or import from an external system is overwritten on the Origination tab with informed borrowing information sent in a response file. The three fields are set to display only after the values are updated and saved following manual entry, multiple entry, external import, or by importing response data.

The following related enhancements are available in the Direct Loan module in Release 2.0:

Entry

- **Informed Borrowing Fields Added to Origination Tab** – We added a new sub-tab labeled “Inform Borr” to the Origination (Direct Loan) tab. The Inform Borr sub-tab displays three fields (Informed Borrowing Complete, Informed Borrowing Completion Date, and Informed Borrowing ID) related to Federal Student Aid’s new Annual Student Loan Acknowledgement process on the studentaid.gov Web site. The informed borrowing fields are automatically updated by importing response file data from the COD System that contains the results of the borrower’s loan balance acknowledgement online.

Any informed borrowing data you enter manually on the Inform Borr sub-tab, update using Direct Loan Multiple Entry, or import from an external system is overwritten on the Origination tab with informed borrowing information sent in a response file. The three fields are also set to display only after the values are updated and saved following manual entry, multiple entry, external import, or by importing response data.

Import

- **Informed Borrowing Fields Added to External Imports** – We updated the record layout for Loan Data-External Add (message class DIEA21OP) import files to enable you to add values for the new Informed Borrowing Complete, Informed Borrowing Completion Date, and Informed Borrowing ID fields, which are displayed on the new “Inform Borr” sub-tab of the Origination (Direct Loan) tab. We also assigned import change field numbers for all three new fields that you can include in Loan Data-External Change (message class DIEC21OP) import files to add values for existing records (if the fields are currently blank).

Note: See the *2020-2021 Common Origination and Disbursement (COD) Technical Reference*, Volume III, for Direct Loan external import record layouts. The technical reference is available for download in Adobe PDF format from the IFAP Web site.

- **Informed Borrowing Response Import Added** – We expanded the COD Common Record Response import type in the Direct Loan module’s Import dialog box to include the new Informed Borrowing Response (message class CRIB21OP), which the COD System generates automatically when new loans are linked to a previous loan balance acknowledgement submitted by the borrower (student or parent) on studentaid.gov or at the request of the school on the COD Web site. The new informed borrowing fields are also included in COD Common Record Response (message class CRAA21OP) and Web-Initiated Response (message class CRWB21OP) files.

Compatibility and Compliance

Microsoft Windows Information

EDEExpress 2020-2021 is supported currently for the Microsoft Windows 7, Windows 8, and Windows 10 operating systems. For more information on minimal and optimal system recommendations, see the *EDEExpress 2020-2021 Installation Guide* and the [March 7, 2017 electronic announcement](#) posted to the IFAP Web site.

Note: Federal Student Aid has completed compatibility testing using the Microsoft Corporation's Windows 10 as an operating system for both the EDEExpress and DL Tools programs, and we did not identify any issues. For more information, see the [September 4, 2019 electronic announcement](#) posted to the IFAP Web site.

Section 508 Compliance

To comply with Section 508 of the Rehabilitation Act, all EDESuite PC products are compatible with screen reader technology used by the visually impaired. Screen reader software cannot interpret color shading in EDESuite software entry fields. To accommodate this restriction, EDESuite software includes the following features:

- All software fields that are shaded yellow to indicate they are required also display a “-R” after the software label. The “-R” indicates the field is required.
- All software fields that are shaded blue after a previously saved value has been modified also display a “-C” after the software label. The “-C” text indicates the field has been changed.

Getting Help

If You Have Technical Support Questions

If you have questions regarding EDEExpress installation or functionality, have trouble accessing the software or its user documentation, or require other technical assistance, contact CPS/SAIG Technical Support.

You can reach CPS/SAIG Technical Support Monday through Friday, 8 a.m. – 8 p.m. (ET), at **800/330-5947**. You can also send e-mail inquiries, comments, or suggestions to CPSSAIG@ed.gov.

You can also post questions regarding EDEExpress on FSATECH. FSATECH is an electronic mailing list for technical questions about Federal Student Aid systems, software, and mainframe products. For more information on subscribing to FSATECH, go to <https://www2.ed.gov/offices/OSFAP/services/fsatechsubscribe.html>.

If You Have Questions Regarding the COD System

If you have any questions about the COD System, contact the COD School Relations Center at 800/848-0978. You may also e-mail CODSupport@ed.gov.