
Technical Reference for

EDExpress Packaging

2021-2022

U.S. Department of Education



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Record Descriptions

Overview

This section of the *Packaging Technical Reference* provides instructions and record layouts for integrating your school's mainframe or third-party software with the EDEExpress for Windows Packaging module.

Schools can update the Packaging database table with an external import function. This function enables you to add or modify records in the Packaging module of EDEExpress by importing External Add, External Change, and Add Funds records from an external system. For example, you may want to import packaging data into EDEExpress from your school's system using an External Add file.

In addition to importing records from an external system, EDEExpress can export packaging data in custom file formats. After you have packaged your students, you can export the packaging data from EDEExpress to your school's system.

The Packaging Module includes the Teacher Education Assistance for College and Higher Education Grant (TEACH Grant) as Aid Type **T** in Fund Maintenance setup. As with aid type codes **D, E, F, K, P, S, W,** and **U**, Aid Type **T** can be used only once. The TEACH Grant cannot be added to an award methodology. It can only be added to records manually or through an external add. The Package/Repackage processes will not award the TEACH Grant.

Getting Help

CPS/SAIG Technical Support

If you have concerns or questions regarding this technical reference, contact CPS/SAIG Technical Support. Working hours are 8 a.m.–8 p.m. (ET), Monday through Friday.

Toll-free: 800/330-5947

Fax: 319/665-7662

E-mail: 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.

Instructions

Descriptions and field values are provided for four record layouts:

- Packaging Import External Add Record
- Packaging Import External Change Record
- Packaging Import Change Field Numbers Record
- Packaging Import Add Funds Amount Record

A description is provided for:

- Packaging Export Record

Packaging Import External Add Record Description

Each imported Add record undergoes field-by-field editing during the Save process. All records failing edits are listed on the Import Records Edit Report. The report contains a line for each record that has a reject, a warning, or has been skipped, as well as the student's Social Security Number (SSN), a reject or warning message, and the data field in question (if appropriate).

If more than one record with the same SSN exists in an External Add file, only the first record is imported. Duplicate records are skipped. The Import Records Edit Report lists any duplicate records that were not imported.

The following fields receive a reject error message during the Import Add process if they are invalid or left blank:

- Student's Original SSN
- Name ID
- Transaction Number
- Pell EFC
- EFC

All other fields in error receive a warning message if the data field content is invalid or a required field is left blank.

Packaging Import External Change Record Description

Like the Add record, each imported Change record undergoes field-by-field editing during the Save process. All records failing edits are listed on the Import Edit Error Report. Entries on the report include warnings about the record or any records skipped. The report contains the student's Social Security Number (SSN), a warning message, and the data field in question (if appropriate).

All records in the Packaging database can be updated through the Import External Change record. Any changes listed in the import file are applied directly to the student record.

Note: If a change is made to a record with packaging status **P** (Packaged), EDEExpress automatically updates the status to **M** (Manually Adjusted).

Requirements

The following two requirements must be addressed when you build your Packaging Import External Change record:

- The Social Security Number (SSN) on the Change record must be for a student who already exists in the Packaging database.
- Except for the e-mail address fields, display-only fields cannot be updated through a Change record.

Packaging Import Change Field Numbers Record Description

When changing data through the Import External Change process, you must use the correct field number for the fields you want to change. The Import Change Field Numbers record description provides the information you need for importing external changes.

Packaging Import Add Fund Amounts Record Description

EDEExpress enables you to import fund information into your Packaging database using an Add Fund Amounts record.

The fund amounts are added to the student records and are displayed on the Awarded Funds grid. The update file must contain the fund code and fund amount to add to the student record. All records that fail edits are printed on the Import Records Edit Report.

Up to ten funds can be added within one record. If you need to add more than ten funds for a student, create two records within the import file.

All records in the Packaging database, except those with packaging status **N** (Not Ready to Package), can be updated through the Add Fund Amounts record. Any funds listed in the import file are applied directly to the Awarded Funds grid on the student record.

Note: If a fund is added for a record with packaging status **P** (Packaged), EDEExpress automatically updates the status to **M** (Manually Adjusted).

Requirements

The following two requirements must be addressed when you build your Import Add Fund Amounts record:

- The Social Security Number (SSN) on the fund record must be for a student who already exists in the Packaging database.
- The fund code in the import file must already exist in Packaging Fund Maintenance setup, and the fund must have a balance greater than \$0.

Any fund amount listed in the import file is added to the student record. If a fund code already exists on a student record and the import file contains another Add record for that code, the fund is added to the student record and appears twice in the Awarded Funds dialog box. However, the fund total appears as a single entry on the award letter mailed to the student.

For example, if a student has a subsidized Stafford loan amount of \$2,000 and a file is imported containing an additional subsidized Stafford loan of \$1,000, two loans appear on the Awarded Funds grid for this student. The amount of the original loan still reads \$2,000, and the additional loan is awarded for \$1,000, resulting in a \$3,000 total subsidized Stafford loan.

Packaging Export Record Description

You can export specific information from your packaging records in EDEExpress to other school systems, including disbursement systems, by defining customized export record layouts using the File Format option.

To create file formats, go to **Tools, File Formats** from the EDEExpress menu bar, then choose **Packaging**. In the Export dialog box, you must give the file format a two-character identifier (alphanumeric) and a title. You can include Packaging, Demographic, and User Database fields in your export format. File formats are limited to a maximum of 255 fields.

To print file formats you have created in layout format, select **File, Print** from the EDEExpress menu bar, then choose **Packaging, RL–User-Defined Formats**. The export record layout provides the title, type (alphanumeric), and size for each field.

To export an external file, go to **File, Export** from the EDEExpress menu bar, then choose **Packaging, Packaging Data**. In this dialog box, select the Format Code you want to use and the destination of the export file. Click the **down** arrow to select an export status. Values are **Y** (Yes), **N** (No), or **B** (Both). The default value is **Y**. Click the **down** arrow to select a delimiter type. Values are **Fixed Length**, **Tab Delimited**, **Comma Delimited**, and **Custom Delimited**. The default value is **Fixed Length**. If you select **Custom Delimiter**, type the delimiter you want to use between fields. You can limit the number of records being exported by using Selection Criteria.

You can apply password protection to files exported from EDEExpress. To use this optional feature, enter and verify a password in the fields provided in the Export dialog box. The exported file is compressed and encrypted in ZIP format.

Packaging Import External Add Record Layout

| Field # | Start Position | End Position | Field Length | Field Name | Valid Field Content | Justify |
|---------|----------------|--------------|--------------|--|--|---------|
| 1 | 1 | 9 | 9 | Student's Original Social Security Number | 001010001 to 999999999 | Right |
| 2 | 10 | 11 | 2 | Name ID | Uppercase letters A to Z Space(s) (Period) ' (Apostrophe) (Dash) | Left |
| 3 | 12 | 13 | 2 | Transaction Number The ISIR transaction number. | 00 to 99 | Right |
| 4 | 14 | 22 | 9 | Student's Current Social Security Number | 001010001 to 999999999 | Right |
| 5 | 23 | 38 | 16 | Student's Last Name | Numbers 0 to 9 Uppercase letters A to Z Space(s) (Period) ' (Apostrophe) (Dash) Can be blank If non-blank, first character must be a letter Second character must be non-numeric | Left |
| 6 | 39 | 50 | 12 | Student's First Name | Numbers 0 to 9 Uppercase letters A to Z Space(s) (Period) ' (Apostrophe) (Dash) Can be blank If non-blank, first character must be a letter | Left |
| 7 | 51 | 51 | 1 | Middle Initial | Uppercase letters A to Z Can be blank | Left |

Packaging Import External Add Record Layout (Continued)

| Field # | Start Position | End Position | Field Length | Field Name | Valid Field Content | Justify |
|---------|----------------|--------------|--------------|----------------------------------|---|---------|
| 8 | 52 | 86 | 35 | Permanent Mailing Address | Numbers 0 to 9 Uppercase letters A to Z . (Period) , (Comma) ' (Apostrophe) - (Dash) # (Number) @ (At) % (Percent or Care of) & (Ampersand) / (Slash) Space(s) Can be blank | Left |
| 9 | 87 | 102 | 16 | Student's Permanent City | Numbers 0 to 9 Uppercase letters A to Z . (Period) , (Comma) ' (Apostrophe) - (Dash) # (Number) @ (At) % (Percent or Care of) & (Ampersand) / (Slash) Space(s) Can be blank | Left |
| 10 | 103 | 104 | 2 | Student's Permanent State | Uppercase letters A to Z Valid postal code from State/Country/Jurisdiction Codes table Can be blank | Left |
| 11 | 105 | 113 | 9 | Student's Permanent Zip Code | 000000000 to 999999999 Can be blank | Right |
| 12 | 114 | 123 | 10 | Student's Permanent Phone Number | 0000000000 to 9999999999 Can be blank | Right |

Packaging Import External Add Record Layout (Continued)

| Field # | Start Position | End Position | Field Length | Field Name | Valid Field Content | Justify |
|---------|----------------|--------------|--------------|------------------------|---|---------|
| 13 | 124 | 158 | 35 | Local Address | Numbers 0 to 9 Uppercase letters A to Z . (Period) , (Comma) ' (Apostrophe) - (Dash) # (Number) @ (At) % (Percent or Care of) & (Ampersand) / (Slash) Space(s) Can be blank | Left |
| 14 | 159 | 174 | 16 | Local Address City | Numbers 0 to 9 Uppercase letters A to Z . (Period) , (Comma) ' (Apostrophe) - (Dash) # (Number) @ (At) % (Percent or Care of) & (Ampersand) / (Slash) Space(s) Can be blank | Left |
| 15 | 175 | 176 | 2 | Local Address State | Uppercase letters A to Z Valid postal code from State/Country/Jurisdiction Codes table | Left |
| 16 | 177 | 185 | 9 | Local Zip Code | 000000000 to 999999999 | Right |
| 17 | 186 | 195 | 10 | Local Phone Number | 0000000000 to 9999999999 | Right |
| 18 | 196 | 196 | 1 | College Grade Level | 0 = 1st year undergraduate/never attended college 1 = 1st year undergraduate/attended college before 2 = 2nd year undergraduate/sophomore 3 = 3rd year undergraduate/junior 4 = 4th year undergraduate/senior 5 = 5th year/other undergraduate 6 = 1st year graduate/professional 7 = Continuing graduate/professional or beyond | Left |

Packaging Import External Add Record Layout (Continued)

| Field # | Start Position | End Position | Field Length | Field Name | Valid Field Content | Justify |
|---------|----------------|--------------|--------------|--------------------------------------|---|---------|
| 19 | 197 | 200 | 4 | Academic Year Profile Code | Numbers 0 to 9 Uppercase letters A to Z Valid Academic Year Profile code defined in Setup | Left |
| 20 | 201 | 201 | 1 | Dependency Status | I = Independent D = Dependent Can be blank | Left |
| 21 | 202 | 205 | 4 | Budget Code | Valid Budget Code defined in Setup Can be blank | Left |
| 22 | 206 | 211 | 6 | EFC | 000000 to 999999 | Left |
| 23 | 212 | 212 | 1 | Verification Status Code | V = Verified W = Without documentation S = Selected, not verified Blank | Left |
| 24 | 213 | 213 | 1 | Student is Selected for Verification | Y = Selected N = Not selected * = A subsequent transaction was selected for verification | Left |
| 25 | 214 | 219 | 6 | Parent Contribution | 000000 to 999999 | Right |
| 26 | 220 | 228 | 9 | Total Income | -99999999 to 99999999 | Right |
| 27 | 229 | 229 | 1 | Enrollment Status Term 1 | 1 = Full time 2 = 3/4 time 3 = 1/2 time 4 = Less than 1/2 time 5 = Not enrolled | Right |
| 28 | 230 | 230 | 1 | Enrollment Status Term 2 | 1 = Full time 2 = 3/4 time 3 = 1/2 time 4 = Less than 1/2 time 5 = Not enrolled | Right |
| 29 | 231 | 231 | 1 | Enrollment Status Term 3 | 1 = Full time 2 = 3/4 time 3 = 1/2 time 4 = Less than 1/2 time 5 = Not enrolled | Right |
| 30 | 232 | 232 | 1 | Enrollment Status Term 4 | 1 = Full time 2 = 3/4 time 3 = 1/2 time 4 = Less than 1/2 time 5 = Not enrolled | Right |

Packaging Import External Add Record Layout (Continued)

| Field # | Start Position | End Position | Field Length | Field Name | Valid Field Content | Justify |
|---------|----------------|--------------|--------------|------------------------------------|--|---------|
| 31 | 233 | 233 | 1 | Enrollment Status Term 5 | 1 = Full time 2 = 3/4 time 3 = 1/2 time 4 = Less than 1/2 time 5 = Not enrolled | Right |
| 32 | 234 | 234 | 1 | Housing Plans | 1 = On-campus 2 = With parent 3 = Off-campus Can be blank | Left |
| 33 | 235 | 236 | 2 | SAP Indicator | Valid SAP code defined in Setup Can be blank | Left |
| 34 | 237 | 237 | 1 | Default Status Indicator | Y = In Default N = Not in Default Z = Override | Left |
| 35 | 238 | 238 | 1 | Interested in Employment? | 1 = Yes 0 = No Can be blank | Left |
| 36 | 239 | 239 | 1 | Interested in Student Loans? | 1 = Yes 0 = No Can be blank | Left |
| 37 | 240 | 241 | 2 | Student's State of Legal Residence | Uppercase letters A to Z Valid postal code from State/Country/Jurisdiction Codes table Can be blank | Left |
| 38 | 242 | 243 | 2 | Parents' State of Legal Residence | Uppercase letters A to Z Valid postal code from State/Country/Jurisdiction Codes table Can be blank | Left |
| 39 | 244 | 244 | 1 | Borrower Based Indicator | 1 = Yes Blank = No | Left |
| 40 | 245 | 252 | 8 | Transaction Processed Date | Format is CCYYMMDD 20201001 to 20220930 | Right |
| 41 | 253 | 253 | 1 | Simplified Needs Indicator | 1 = Yes 0 = No | Left |
| 42 | 254 | 258 | 5 | Pell COA | 00000 to 99999 Can be blank If blank, set Pell COA to value in Budget Setup for the Budget assigned to the record. If no Budget Code assigned, set to 00000. | Right |
| 43 | 259 | 264 | 6 | Pell EFC | 000000 to 999999 | Right |
| 44 | 265 | 265 | 1 | Automatic Zero EFC | Y = Yes, EFC set to zero based on income criteria Blank = Flag not set | Left |
| 45 | 266 | 266 | 1 | Update Demo Record Flag | Y = Yes, update Demo record Blank = Do not update Demo record | Left |

Packaging Import External Add Record Layout (Continued)

| Field # | Start Position | End Position | Field Length | Field Name | Valid Field Content | Justify |
|---------|----------------|--------------|--------------|------------------------------------|---|---------|
| 46 | 267 | 267 | 1 | Prior Degree? | 1 = Yes, student has prior degree 0 = No, student does not have prior degree | Left |
| 47 | 268 | 268 | 1 | Pell Eligibility Flag | 1 = Yes, student is Pell-eligible Blank = No, student is not Pell-eligible | Left |
| 48 | 269 | 276 | 8 | Application Received Date | Format is CCYYMMDD 20201001 to 20220930 | Left |
| 49 | 277 | 277 | 1 | Filler | N/A | N/A |
| 50 | 278 | 283 | 6 | Aggregate Subsidized Loan Amount | 000000 to 999999 | Right |
| 51 | 284 | 289 | 6 | Aggregate Unsubsidized Loan Amount | 000000 to 999999 | Right |
| 52 | 290 | 295 | 6 | Aggregate Perkins Loan Amount | 000000 to 999999 | Right |
| 53 | 296 | 345 | 50 | Student's E-mail Address 1 | One and only one "at" sign (@) allowed Before the "at" sign: - at least one valid character - all characters in the range of ASCII 33 to 126, except for the following twelve characters: < > () [] \ , ; : " @ - period cannot be first, last or adjacent to another period After the "at" sign: - at least one valid character - only letters, digits, hyphen, underscore and period (uppercase letters A to Z, lowercase letters a to z, numbers 0 to 9, - , _ , .) - hyphen, underscore and period cannot be first, last, or adjacent to a period Can be blank If blank, and a demo record exists for the student, no update is made | Left |

Packaging Import External Add Record Layout (Continued)

| Field # | Start Position | End Position | Field Length | Field Name | Valid Field Content | Justify |
|---------|--------------------|--------------|--------------|----------------------------|---|---------|
| 54 | 346 | 395 | 50 | Student's E-mail Address 2 | <p>One and only one "at" sign (@) allowed</p> <p>Before the "at" sign:</p> <ul style="list-style-type: none"> - at least one valid character - all characters in the range of ASCII 33 to 126, except for the following twelve characters: < > () [] \ , ; : " @ - period cannot be first, last or adjacent to another period <p>After the "at" sign:</p> <ul style="list-style-type: none"> - at least one valid character - only letters, digits, hyphen, underscore and period (uppercase letters A to Z, lowercase letters a to z, numbers 0 to 9, - , _ .) - hyphen, underscore and period cannot be first, last, or adjacent to a period <p>Can be blank</p> <p>If blank, and a demo record exists for the student, no update is made</p> | Left |
| | Total Bytes | 395 | | | | |

Packaging Import External Change Record Layout

| Field# | Start Position | End Position | Field Length | Field Name | Valid Field Content | Justify |
|--------|----------------|--------------|--------------|--|--|---------|
| 1 | 1 | 9 | 9 | Student's Original SSN | 001010001 to 999999999 | Right |
| 2 | 10 | 11 | 2 | Student's Name Identifier | Uppercase letters A to Z Space(s) (Period) ' (Apostrophe) (Dash) | Left |
| 3 | 12 | 13 | 2 | Transaction Number The ISIR transaction number. | 00 to 99 | Right |
| 4 | 14 | 15 | 2 | Sequence Numbers | 01 to 99 | Right |
| 5 | 16 | 19 | 4 | Change Field Number 1 | Field number representing the first field to be changed. | Left |
| 6 | 20 | 54 | 35 | Value 1 | The value that the first field should be changed to. | Left |
| 7 | 55 | 58 | 4 | Change Field Number 2 | Field number representing the second field to be changed. | Left |
| 8 | 59 | 93 | 35 | Value 2 | The value that the second field should be changed to. | Left |
| 9 | 94 | 97 | 4 | Change Field Number 3 | Field number representing the third field to be changed. | Left |
| 10 | 98 | 132 | 35 | Value 3 | The value that the third field should be changed to. | Left |
| 11 | 133 | 136 | 4 | Change Field Number 4 | Field number representing the fourth field to be changed. | Left |
| 12 | 137 | 171 | 35 | Value 4 | The value that the fourth field should be changed to. | Left |
| 13 | 172 | 175 | 4 | Change Field Number 5 | Field number representing the fifth field to be changed. | Left |
| 14 | 176 | 210 | 35 | Value 5 | The value that the fifth field should be changed to. | Left |
| 15 | 211 | 214 | 4 | Change Field Number 6 | Field number representing the sixth field to be changed. | Left |
| 16 | 215 | 249 | 35 | Value 6 | The value that the sixth field should be changed to. | Left |
| 17 | 250 | 253 | 4 | Change Field Number 7 | Field number representing the seventh field to be changed. | Left |

Packaging Import External Change Record Layout (Continued)

| Field # | Start Position | End Position | Field Length | Field Name | Valid Field Content | Justify |
|---------|----------------|--------------|--------------|----------------------------|---|---------|
| 18 | 254 | 288 | 35 | Value 7 | The value that the seventh field should be changed to. | Left |
| 19 | 289 | 292 | 4 | Change Field Number 8 | Field number representing the eighth field to be changed. | Left |
| 20 | 293 | 327 | 35 | Value 8 | The value that the eighth field should be changed to. | Right |
| 21 | 328 | 331 | 4 | Change Field Number 9 | Field number representing the ninth field to be changed. | Left |
| 22 | 332 | 366 | 35 | Value 9 | The value that the ninth field should be changed to. | Left |
| 23 | 367 | 370 | 4 | Change Field Number 10 | Field number representing the tenth field to be changed. | Left |
| 24 | 371 | 405 | 35 | Value 10 | The value that the tenth field should be changed to. | Left |
| 25 | 406 | 455 | 50 | Student's E-mail Address 1 | <p>One and only one "at" sign (@) allowed</p> <p>Before the "at" sign:</p> <ul style="list-style-type: none"> - at least one valid character - all characters in the range of ASCII 33 to 126, except for the following twelve characters: < > () [] \ , ; " @ - period cannot be first, last or adjacent to another period <p>After the "at" sign:</p> <ul style="list-style-type: none"> - at least one valid character - only letters, digits, hyphen, underscore and period (uppercase letters A to Z, lowercase letters a to z, numbers 0 to 9, -, _, .) - hyphen, underscore and period cannot be first, last, or adjacent to a period <p>Can be blank</p> <p>If blank, and a demo record exists for the student, no update is made</p> | Left |

Packaging Import External Change Record Layout (Continued)

| Field # | Start Position | End Position | Field Length | Field Name | Valid Field Content | Justify |
|---------|--------------------|--------------|--------------|----------------------------|--|---------|
| 26 | 456 | 505 | 50 | Student's E-mail Address 2 | <p>One and only one "at" sign (@) allowed</p> <p>Before the "at" sign:</p> <ul style="list-style-type: none"> - at least one valid character - all characters in the range of ASCII 33 to 126, except for the following twelve characters: < > () [] \ , ; : " @ - period cannot be first, last or adjacent to another period <p>After the "at" sign:</p> <ul style="list-style-type: none"> - at least one valid character - only letters, digits, hyphen, underscore and period (uppercase letters A to Z, lowercase letters a to z, numbers 0 to 9, -, _, .) - hyphen, underscore and period cannot be first, last, or adjacent to a period <p>Can be blank</p> <p>If blank, and a demo record exists for the student, no update is made</p> | Left |
| | Total Bytes | 505 | | | | |

Packaging Import Change Field Numbers Record Description

| Field # | Field Length | Field Name | Valid Field Content | Justify |
|---------|--------------|--|--|---------|
| 0004 | 12 | Student's First Name | Numbers 0 to 9 Uppercase letters A to Z Space(s) (Period) ' (Apostrophe) (Dash) Can be blank If non-blank, first character must be a letter | Left |
| 0005 | 1 | Middle Initial | Uppercase letters A to Z Can be blank | Left |
| 0006 | 16 | Student's Last Name | Numbers 0 to 9 Uppercase letters A to Z Space(s) (Period) ' (Apostrophe) (Dash) Can be blank If non-blank, first character must be a letter Second character must be non-numeric | Left |
| 0007 | 9 | Student's Current Social Security Number | 001010001 to 999999999 | Left |
| 0008 | 35 | Permanent Mailing Address | Numbers 0 to 9 Uppercase letters A to Z (Period) (Comma) ' (Apostrophe) (Dash) (Number) (At) (Percent or Care of) (Ampersand) (Slash) Space(s) Can be blank | Left |

Packaging Import Change Field Numbers Record Description (Continued)

| Field # | Field Length | Field Name | Valid Field Content | Justify |
|---------|--------------|------------------------------|---|---------|
| 0009 | 16 | Student's Permanent City | Numbers 0 to 9 Uppercase letters A to Z . (Period) , (Comma) ' (Apostrophe) - (Dash) # (Number) @ (At) % (Percent or Care of) & (Ampersand) / (Slash) Space(s) Can be blank | Left |
| 0010 | 2 | Student's Permanent State | Uppercase letters A to Z Valid postal code from State/Country/Jurisdiction Codes table Can be blank | Left |
| 0011 | 9 | Student's Permanent Zip Code | 000000000 to 999999999 Can be blank | Right |
| 0012 | 35 | Local Address | Numbers 0 to 9 Uppercase letters A to Z . (Period) , (Comma) ' (Apostrophe) - (Dash) # (Number) @ (At) % (Percent or Care of) & (Ampersand) / (Slash) Space(s) Can be blank | Left |
| 0013 | 16 | Local Address City | Numbers 0 to 9 Uppercase letters A to Z . (Period) , (Comma) ' (Apostrophe) - (Dash) # (Number) @ (At) % (Percent or Care of) & (Ampersand) / (Slash) Can be blank | Left |

Packaging Import Change Field Numbers Record Description (Continued)

| Field # | Field Length | Field Name | Valid Field Content | Justify |
|---------|--------------|---------------------------------------|--|---------|
| 0014 | 2 | Local Address State | Uppercase letters A to Z Valid postal code from State/Country/Jurisdiction Codes table Can be blank | Left |
| 0015 | 9 | Local Zip Code | 000000000 to 999999999 Can be blank | Right |
| 0016 | 10 | Student's Permanent Phone Number | 0000000000 to 9999999999 Can be blank | Right |
| 0017 | 20 | Student's Driver's License Number | Numbers 0 to 9 Uppercase letters A to Z Space(s) - (Dash) * (Asterisk) Can be blank | Left |
| 0018 | 2 | Student's Driver's License State Code | Valid postal code from State/Country/Jurisdiction Codes table Can be blank | Left |
| 0019 | 2 | Student's State of Legal Residence | Uppercase letters A to Z Valid postal code from State/Country/Jurisdiction Codes table | Left |
| 0020 | 8 | Student's Date of Birth | Format is CCYYMMDD 19000101 to current date | Right |
| 0022 | 6 | EFC | 000000 to 999999 Can be blank | Right |
| 0023 | 4 | Academic Year Profile Code | Numbers 0 to 9 Uppercase letters A to Z Valid Academic Year Profile Code defined in Setup | Left |
| 0024 | 1 | Default Status Indicator | Y = In default N = Not in default Z = Override | Left |
| 0025 | 2 | SAP Indicator | Valid SAP Code defined in Setup Can be blank | Left |
| 0026 | 4 | Budget Code | Numbers 0 to 9 Uppercase letters A to Z + (Plus sign) - (Dash) * (Asterisk) # (Number sign) . (Period) | Left |
| 0027 | 1 | Dependency Status | I = Independent D = Dependent | Left |

Packaging Import Change Field Numbers Record Description (Continued)

| Field # | Field Length | Field Name | Valid Field Content | Justify |
|---------|--------------|--------------------------------------|---|---------|
| 0028 | 1 | Student is Selected for Verification | Y = Selected N = Not selected * = A subsequent transaction was selected for verification | Left |
| 0029 | 1 | Enrollment Status Term 1 | 1 = Full time 2 = 3/4 time 3 = 1/2 time 4 = Less than 1/2 time 5 = Not enrolled | Right |
| 0030 | 1 | Enrollment Status Term 2 | 1 = Full time 2 = 3/4 time 3 = 1/2 time 4 = Less than 1/2 time 5 = Not enrolled | Right |
| 0031 | 1 | Enrollment Status Term 3 | 1 = Full time 2 = 3/4 time 3 = 1/2 time 4 = Less than 1/2 time 5 = Not enrolled | Right |
| 0032 | 1 | Enrollment Status Term 4 | 1 = Full time 2 = 3/4 time 3 = 1/2 time 4 = Less than 1/2 time 5 = Not enrolled | Right |
| 0033 | 1 | Enrollment Status Term 5 | 1 = Full time 2 = 3/4 time 3 = 1/2 time 4 = Less than 1/2 time 5 = Not enrolled | Right |
| 0037 | 9 | Total Income | -99999999 to 99999999 | Right |
| 0039 | 1 | College Grade Level | 0 = 1st year undergraduate/never attended college 1 = 1st year undergraduate/attended college before 2 = 2nd year undergraduate/sophomore 3 = 3rd year undergraduate/junior 4 = 4th year undergraduate/senior 5 = 5th year/other undergraduate 6 = 1st year graduate/professional 7 = Continuing graduate/professional or beyond | Right |
| 0040 | 1 | Housing Plans | 1 = On-campus 2 = With parent 3 = Off-campus Can be blank | Left |

Packaging Import Change Field Numbers Record Description (Continued)

| Field # | Field Length | Field Name | Valid Field Content | Justify |
|---------|--------------|------------------------------------|---|---------|
| 0043 | 1 | Interested in Employment? | 1 = Yes 0 = No Can be blank | Left |
| 0044 | 1 | Interested in Student Loans? | 1 = Yes 0 = No Can be blank | Left |
| 0045 | 6 | Aggregate Subsidized Loan Amount | 000000 to 999999 | Right |
| 0046 | 6 | Aggregate Unsubsidized Loan Amount | 000000 to 999999 | Right |
| 0047 | 6 | Aggregate Perkins Loan Amount | 000000 to 999999 | Right |
| 0052 | 1 | Packaging Result | A = Accepted D = Declined O = Offered S = Suspend | Left |
| 0292 | 1 | Automatic Zero EFC | Y = Yes, EFC set to zero based on income criteria Blank = Flag not set | Left |
| 0294 | 6 | Pell EFC | 000000 to 999999 | Right |
| 0295 | 10 | Local Phone Number | 0000000000 to 9999999999 | Left |
| 0296 | 1 | Verification Status Code | Uppercase letters A to Z Contain only: V = Verified W = Without documentation S = Selected for verification but not verified Blank | Left |
| 0298 | 1 | Simplified Needs Indicator | 1 = Yes 0 = No | Left |
| 0299 | 8 | Transaction Processed Date | Format is CCYYMMDD 20201001 to 20220930 | Right |
| 0300 | 1 | Prior Degree | 1 = Student has prior degree 0 = Student does not have prior degree | Left |
| 0301 | 1 | Pell Eligibility Flag | 1 = Yes Pell eligible per CPS Blank = Not Pell eligible per CPS | Left |
| 0302 | 8 | Application Received Date | Format is CCYYMMDD 20201001 to 20220930 | Right |
| 0303 | 6 | Parent Contribution | 000000 to 999999 | Right |
| 0305 | 1 | Print Letter in Next Batch | Y = Yes N = No | N/A |
| 0306 | 5 | Pell COA | 00000 to 99999 Can be blank | Right |

Packaging Import Change Field Numbers Record Description (Continued)

| Field # | Field Length | Field Name | Valid Field Content | Justify |
|---------|--------------|-----------------------------------|--|---------|
| 0307 | 2 | Parents' State of Legal Residence | Uppercase letters A to Z Valid postal code from State/Country/Jurisdiction Codes table Can be blank | Left |

Packaging Import Add Funds Amount Record Layout

| Field # | Start Position | End Position | Field Length | Field Name | Valid Field Content |
|---------|----------------|--------------|--------------|---|--|
| 1 | 1 | 9 | 9 | Original SSN First portion of trankey. | 001010001 to 999999999 |
| 2 | 10 | 11 | 2 | Name ID Second portion of trankey. | Uppercase letters A to Z Space(s) (Period) ' (Apostrophe) (Dash) |
| 3 | 12 | 13 | 2 | Transaction Number The ISIR transaction number. Third portion of trankey. | 00 to 99 |
| 4 | 14 | 18 | 5 | Sequence Number | The sequence number of this change record. |
| 5 | 19 | 26 | 8 | Fund Code 1 | As defined in Setup. Must be Fund Code name existing on database. |
| 6 | 27 | 31 | 5 | Fund Value 1 | Valid Amount for Current Total on student record Awarded Funds grid. |
| 7 | 32 | 39 | 8 | Fund Code 2 | As defined in Setup. Must be Fund Code name existing on database. |
| 8 | 40 | 44 | 5 | Fund Value 2 | Valid Amount for Current Total on student record Awarded Funds grid. |
| 9 | 45 | 52 | 8 | Fund Code 3 | As defined in Setup. Must be Fund Code name existing on database. |
| 10 | 53 | 57 | 5 | Fund Value 3 | Valid Amount for Current Total on student record Awarded Funds grid. |
| 11 | 58 | 65 | 8 | Fund Code 4 | As defined in Setup. Must be Fund Code name existing on database. |
| 12 | 66 | 70 | 5 | Fund Value 4 | Valid Amount for Current Total on student record Awarded Funds grid. |
| 13 | 71 | 78 | 8 | Fund Code 5 | As defined in Setup. Must be Fund Code name existing on database. |
| 14 | 79 | 83 | 5 | Fund Value 5 | Valid Amount for Current Total on student record Awarded Funds grid. |
| 15 | 84 | 91 | 8 | Fund Code 6 | As defined in Setup. Must be Fund Code name existing on database. |
| 16 | 92 | 96 | 5 | Fund Value 6 | Valid Amount for Current Total on student record Awarded Funds grid. |

Packaging Import Add Funds Amount Record Layout (Continued)

| Field # | Start Position | End Position | Field Length | Field Name | Valid Field Content |
|---------|----------------|--------------------|--------------|---------------|--|
| 19 | 110 | 117 | 8 | Fund Code 8 | As defined in Setup. Must be Fund Code name existing on database. |
| 20 | 118 | 122 | 5 | Fund Value 8 | Valid Amount for Current Total on student record Awarded Funds grid. |
| 21 | 123 | 130 | 8 | Fund Code 9 | As defined in Setup. Must be Fund Code name existing on database. |
| 22 | 131 | 135 | 5 | Fund Value 9 | Valid Amount for Current Total on student record Awarded Funds grid. |
| 23 | 136 | 143 | 8 | Fund Code 10 | As defined in Setup. Must be Fund Code name existing on database. |
| 24 | 144 | 148 | 5 | Fund Value 10 | Valid Amount for Current Total on student record Awarded Funds grid. |
| | | Total Bytes | 148 | | |

State/Country/Jurisdiction Codes

| State/Country/Jurisdiction | Code | State/Country/Jurisdiction | Code |
|---|------|------------------------------------|----------|
| Alabama | AL | Nebraska | NE |
| Alaska | AK | Nevada | NV |
| Alberta (Canada) | AB | New Brunswick (Canada) | NB |
| American Samoa | AS | New Hampshire | NH |
| Arizona | AZ | New Jersey | NJ |
| Arkansas | AR | New Mexico | NM |
| British Columbia (Canada) | BC | New York | NY |
| California | CA | Newfoundland (Canada) | NF |
| Canada | CN | Newfoundland and Labrador (Canada) | NL |
| Colorado | CO | North Carolina | NC |
| Connecticut | CT | North Dakota | ND |
| Delaware | DE | Northern Mariana Islands | MP |
| District of Columbia | DC | Northwest Territories (Canada) | NT |
| Federated States of Micronesia | FM | Nova Scotia (Canada) | NS |
| Florida | FL | Nunavut (Canada) | NU |
| Foreign Country (other than Canada or Mexico) | FC* | Ohio | OH |
| Georgia | GA | Oklahoma | OK |
| Guam | GU | Ontario (Canada) | ON |
| Hawaii | HI | Oregon | OR |
| Idaho | ID | Pennsylvania | PA |
| Illinois | IL | Prince Edward Island (Canada) | PE |
| Indiana | IN | Puerto Rico | PR |
| Iowa | IA | Quebec (Canada) | PQ or QC |
| Kansas | KS | Republic of Palau | PW |
| Kentucky | KY | Rhode Island | RI |
| Louisiana | LA | Saskatchewan (Canada) | SK |
| Maine | ME | South Carolina | SC |
| Manitoba (Canada) | MB | South Dakota | SD |
| Marshall Islands | MH | Tennessee | TN |
| Maryland | MD | Texas | TX |
| Massachusetts | MA | U.S. Virgin Islands | VI |
| Mexico | MX | Utah | UT |
| Michigan | MI | Vermont | VT |
| Military Location Code AA | AA** | Virginia | VA |
| Military Location Code AE | AE** | Washington | WA |
| Military Location Code AP | AP** | West Virginia | WV |
| Minnesota | MN | Wisconsin | WI |
| Mississippi | MS | Wyoming | WY |
| Missouri | MO | Yukon Territory (Canada) | YT |
| Montana | MT | | |

* Use FC for foreign countries not on this list.

** Code used for a student's mailing state only, not valid for state of legal residence or driver's license state.

Packaging Setup

Overview

This section of the *Packaging Technical Reference* guides you through setting up the Packaging module in EDEExpress.

Note: For further information and guidance on using the Packaging module, refer to the *EDEExpress for Windows, Release 1.0 Desk Reference*.

To access the Packaging Setup dialog box, choose **Tools, Setup** from the EDEExpress menu bar, then choose **Packaging**. Setting up Packaging in EDEExpress includes looking at the following areas:

- System Setup
- Fund Maintenance
- Budgets
- SAP Values (Optional)
- Academic Year Profile
- Award Methodology (Optional if packaging Pell Grant only)
- User-Defined Formulas (Optional)

Other optional items that may be useful for Packaging are Document Tracking, User-Defined Doc Tracking Letter Text, User-Defined Award Letter Text, User-Defined User Letter Text, and User Database. To set up any of these options, select **Tools, Setup, Global**.

Note: The “Interested in Employment” Awards tab checkbox is updated during ISIR import based on the following logic.

- If the “Interested in Work-Study?” ISIR response is **1**, the “Interested In: Employment” checkbox on the Awards tab is selected.
- If the “Interested in Work-Study?” ISIR response is **2, 3**, or blank, the “Interested In: Employment” checkbox on the Awards tab remains cleared.

The “Interested In: Student Loan” field on the Awards tab is not updated by importing ISIRs into Packaging. You can update the checkbox manually on the Awards tab, by using Packaging multiple entry, or by importing a Packaging External Add or External Change file.

The following Packaging setup worksheets are designed to be a helpful guide for getting started in EDEXpress Packaging. If you need more assistance, press the **F1** key while in a setup dialog box, or choose **Help** on the menu bar to access online Help. Packaging setup examples are included in online Help. Additional setup worksheets are provided for your use at the end of this section.

System Setup

Use System setup to establish some of the basic default options for Packaging.

| Question | Possible Answer | Default Answer | Your Answer |
|--|--|-------------------------|-------------|
| Total Number of Award Letters to be Printed per Student? | 1 to 99 | 2 | |
| Maximum Number of Award Letters to be Sent per Student? | 1 to 99 | 5 | |
| Award Letter Type | O = Offer Letter N = Notification Letter | N = Notification Letter | |
| Allow imported Pell EFC to be modified? | Checked = Yes Not checked = No | Checked = Yes | |
| Packaging Results Default Status | O = Offered A = Accepted | A = Accepted | |
| Priority Deadline Date Type | A = Application Received Date P = Processed Date R = Ready Date U = User-Defined Date | P = Processed Date | |
| User-Defined Date Name | See online Help in Packaging System Setup | N/A | |
| Default Housing Plans | 1 = On campus 2 = With parent 3 = Off campus | 3 = Off-campus | |

Total Number of Award Letters to be Printed per Student? Sets the number of copies of an award letter to print for a given student each time you print letters.

Maximum Number of Award Letters to be Sent per Student? Sets the total number of times an award letter is printed for an individual student. Applicable only when award letters are printed from outside a student's record.

Award Letter Type. Determines the format of the printed award letter. The valid types are **O** (Offer Letter) and **N** (Notification Letter). The system default is **N**.

Allow imported Pell EFC to be modified? Determines whether the imported Pell EFC value from ISIR records is display-only or can be modified.

Packaging Results Default Status. Sets the default packaging results status of awarded funds on a student record. The default options are **A** (Accepted) or **O** (Offered). The system default is **A**.

System Setup (Continued)

Priority Deadline Date Type. Sets the deadline date type the Packaging database uses when determining which records to include or exclude from the process being executed. Valid priority deadline dates are:

A = Application Received Date

P = Processed Date

R = Ready Date

U = User Defined Date

The default value for this field is **P**. Before choosing data type **U** (User-Defined Date), you must establish a user-defined date as a field in the User Database, because the date is taken from the User Database.

User Defined Date Name. Indicates the name of the User Database field to use when determining which records to include or exclude when running a process. Available only if the deadline date type is set to **U**.

Default Housing Plans. Determines the housing code the Packaging system uses as the default on manually created records and on ISIRs imported with a blank housing code.

The valid housing codes are:

1 = On campus

2 = With parent

3 = Off campus

The default value for this field is **3**.

Academic Year Profile

The academic year profile (AYP) defines when and how you award money to your students.

For each AYP, you can specify up to five terms that your school will use in the Packaging process, indicate enrollment status, and establish your Pell Grant formula and percent of the full-year awards.

| Question | Possible Answer | Default Answer | Your Answer |
|---|--|------------------|-------------|
| Code | 4 characters (A to Z, 0 to 9) Cannot be blank | N/A | |
| Default | Checked = Yes Not checked = No | Not checked = No | |
| Title | 50 characters (any keyboard character except the pipe [] symbol) Cannot be blank | N/A | |
| Pell Grant Formula | 1 = Standard term, credit hour programs (30 weeks) 2 = Standard term, credit hour programs (<30 weeks) 3 = Any term-based credit hour program 4 = Clock hour and credit hour programs without terms 5 = Correspondence study, non term-based program 6 = Correspondence study, term-based program | 1 | |
| Program Proration Percentage | 000.00 to 100.00 | 000.00 | |
| EFC program length to import from ISIR database | 1 to 12 | 9 | |

| Term Description | Enrollment Status | Pell % | FSEOG % | Grant % | Perkins % | WS % | Subsidized Loan % | Other Loan % |
|------------------|-------------------|--------|---------|---------|-----------|------|-------------------|--------------|
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |

Academic Year Profile (Continued)

Code. A unique four-character code used to identify the AYP. You create the code using any combination of A to Z and 0 to 9.

Default. Tells EDEExpress that this is the AYP you are using most often for your students. Only one AYP can be the default.

Title. A 50-character description of the AYP. You create this description using any combination of keyboard characters, except the pipe (|) symbol. We suggest you give the AYP an easily recognizable name associated with the students to whom it pertains, such as “Full-Year Students” or “In-State Dependent Students.”

Pell Grant Formula. Determines the Pell Grant formulas that you will use with the AYP. The formula options are:

- 1 = Standard term, credit hour programs (30 weeks)
- 2 = Standard term, credit hour programs (<30 weeks)
- 3 = Any term-based credit hour program
- 4 = Clock hour and credit hour programs without terms
- 5 = Correspondence study, non term-based program
- 6 = Correspondence study, term-based program

If your school has programs that use more than one Pell Grant formula, you must create multiple AYP profiles.

Program Proration Percentage. Identifies the percentage of the scheduled annual award your school uses to calculate the total Pell award when you use standard term credit hour (less than 30 weeks), clock hour and credit hour programs without terms, or correspondence programs without terms. This field is required for Pell Grant formulas 2, 4, and 5. This field is disabled for formulas 1, 3, and 6.

EFC program length to import from the ISIR database. Sets the EFC program length (usually nine months) for the ISIRs that will be imported. **Note:** Packaging always awards Pell based on the nine-month EFC.

Term Description. A nine-character field that identifies a specific term. Valid characters for the title are A to Z, 0 to 9, +, -, *, ., and #. The description appears on the award letter, so you should give it a recognizable name.

Enrollment Status. Sets the assumed enrollment status for each term you define: FULL TIME, 3/4 TIME, 1/2 TIME, < 1/2 TIME, and NOT ENROLLED.

Note: The software does not package any funds if the Enrollment Status is NOT ENROLLED. We also do not package subsidized, unsubsidized, PLUS, or need-based loan awards (Aid Type values of S, U, P, or L, respectively) if the Enrollment Status is < 1/2 TIME.

Academic Year Profile (Continued)

This field also can affect Pell awarding. For example, if a student is enrolled half-time, the Pell award is halved, but all other funds are awarded the full amount.

Pell %. Defines the percentage of the Pell award for each term.

FSEOG %, Grant %, Perkins %, WS %, Subsidized Loan %, Other Loan %. Defines the percentage distribution of the student's eligible award to post for each term for the respective fund type at the time the Package process is run. The total of the percentages cannot exceed 100%.

Note: In this case, the “eligible award” is the amount a student is eligible to receive for a specific fund at the point when that fund is being packaged by EDEExpress. Depending on your school's setup, other funds may be awarded first and affect the eligible award amount.

Fund Maintenance

The Fund Maintenance dialog box defines your sources of funding. You can add and maintain as many aid sources as you need for Packaging students. Fund Maintenance also provides you with instant information about total amounts awarded.

| Question | Possible Answer | Default Answer | Your Answer |
|------------------------------|--|------------------|-------------|
| Fund Code | 8 characters (A to Z, 0 to 9, +, -, *, #, .) Cannot be blank | N/A | |
| Fund Description | 25 characters (any keyboard character except the pipe [] symbol) Cannot be blank | N/A | |
| Aid Type | D = Unsubsidized Loan (Unsub, Need Based) E = Supplemental Educational Opportunity Grant (FSEOG) F = Federal Pell Grant G = Grant K = Federal Perkins Loan L = Other Need Based Loan (NB) N = Non-need based loan (NNB) O = Outside Resources P = Federal Parent Loan for Undergraduate Students (PLUS) R = Grant, Non-Need Based S = Subsidized Loan (Need Based) T = Teacher Education Assistance for College and Higher Education Grants (TEACH Grant) U = Unsubsidized Loan (Unsub, Non-Need Based) V = AmeriCorps W = Federal Work-Study (WS) Y = Other Work-Study Cannot be blank. | N/A | |
| Do not remove if unpackaged? | Checked = Yes Not checked = No | Not checked = No | |

Fund Maintenance (Continued)

| Question | Possible Answer | Default Answer | Your answer |
|---------------------------------|--|----------------|-------------|
| Remaining Need | Minimum Need/Maximum Need/Award Amount Enabled for funds with the following aid types: D = Unsubsidized Loan (Unsub, Need Based) E = FSEOG G = Grant K = Federal Perkins Loan L = Other Need Based Loan (NB) N = Non-need Based Loan (NNB) P = Federal Parent Loan for Undergraduate Students (PLUS) R = Grant, Non-Need Based S = Subsidized Loan (Sub, Need Based) U = Unsubsidized Loan (Unsub, Non-Need Based) W = Federal Work-Study (FWS) Y = Other Work-Study Disabled for funds with the following aid types: F = Federal Pell Grant O = Outside Resources T = Teacher Education Assistance for College and Higher Education Grants (TEACH Grant) V = AmeriCorps | N/A | |
| Criteria | Any non-parameter Packaging query | N/A | |
| Beginning Balance | 000000000 to 999999999 DISPLAY ONLY after save. | N/A | |
| Adjustment to Beginning Balance | -999999999 to 999999999 | N/A | |
| Funds Awarded | 000000000 to 999999999 | N/A | |
| Current Balance | 000000000 to 999999999 | N/A | |

Fund Code. An eight-character field used to identify the fund. You create the code using any combination of characters A to Z, 0 to 9, +, -, *, ., or #.

Fund Description. A 25-character description of this fund. You create this description using any combination of valid keyboard characters except the pipe (|) symbol. The fund description appears on the award letter, so it should be given an easily recognizable name.

Fund Maintenance (Continued)

Aid Type. Identifies the aid categories of the fund. The options are:

D = Unsubsidized Loan (Unsub, Need Based)

E = Supplemental Educational Opportunity Grant (FSEOG)

F = Federal Pell Grant

G = Grant

K = Federal Perkins Loan

L = Other Need Based Loan (NB)

N = Non-need based loan (NNB)

O = Outside Resources

P = Federal Parent Loan for Undergraduate Students (PLUS)

R = Grant, Non-Need Based

S = Subsidized Loan (Need Based)

T = Teacher Education Assistance for College and Higher Education Grants (TEACH Grant)

U = Unsubsidized Loan (Unsub, Non-Need Based)

V = AmeriCorps

W = Federal Work-Study (WS)

Y = Other Work-Study

Do not remove if unpackaged? Enables you to unpack records without removing the fund from the record.

Remaining Need. Enables you to award a specific amount of a fund at different levels of remaining need within the packaging process.

Criteria. Specifies the type of students eligible to receive the fund as defined in EDEExpress Packaging query. You can choose any non-parameter Packaging query to limit the population of students who receive this fund to the range of students defined by the query. This field can be left blank.

Note: Parameter queries cannot be used for fund maintenance criteria.

Beginning Balance. Used to record the actual amount of money you have available to award under this fund for the school year. For some funds, such as Pell Grants and federal loans, this field automatically fills in with 9s.

Adjustment to Beginning Balance. Used to record any positive or negative adjustment to the beginning balance. Adjustments might include reauthorization, refunds, or matching funds.

Funds Awarded. A display-only field that displays how much money has been awarded from this fund.

Current Balance. A display-only field that displays how much money is still available to be awarded from this fund.

Packaging Remaining Need Dialog Box

The Remaining Need dialog box can be accessed from both the Fund Maintenance and Award Methodology setup options and is available for all aid types except the following:

F = Federal Pell Grant

O = Outside Resources

T = Teacher Education Assistance for College and Higher Education Grants (TEACH Grant)

V = AmeriCorps

| Question | Minimum Need | Maximum Need | Amount Awarded |
|-----------------|-----------------------------------|-----------------------------------|-----------------------------------|
| Possible Answer | 00000 to 99999 Cannot be blank | 00000 to 99999 Cannot be blank | 00000 to 99999 Cannot be blank |
| Default Answer | N/A | N/A | N/A |
| Your Answer | | | |
| Your Answer | | | |
| Your Answer | | | |

Minimum Need. Enter the minimum remaining need amount for awarding this fund.

Maximum Need. Enter the maximum remaining need amount for awarding this fund.

Note: The minimum and maximum need amounts on one line should not overlap with the minimum and maximum need amounts on any other line. For example, if the first range is 0 to 500, the next range should start with 501 or higher.

Amount Awarded. Enter the amount of this fund that you will award based on the minimum and maximum need range.

Note: Remaining need is optional for Packaging.

Award Methodology

Award Methodology setup enables you to establish methodologies for determining how funds are awarded to your students.

| Question | Possible Answer | Default Answer | Your Answer |
|-----------------------------------|--|-----------------|-------------|
| Code | 4 characters (A to Z, 0 to 9) Cannot be blank | N/A | |
| Title | 50 characters (any keyboard character except the pipe [] symbol) Cannot be blank | N/A | |
| Priority | 1 to 999 Cannot be blank | N/A | |
| Use Percentages/Use Dollar Amount | Use Percentages or Use Dollar Amounts (option button) | Use Percentages | |
| Self-Help Aid Maximum % | 0 to 100 | 100% | |
| Self-Help Aid Maximum \$ | 0 to 99999 | \$0 | |
| Gift Aid Maximum % | 0 to 100 | 100% | |
| Gift Aid Maximum \$ | 0 to 99999 | \$0 | |
| Criteria | Any non-parameter Packaging query | N/A | |

| Fund Code | Fund Priority | School Min | School Max | Min EFC | Max EFC | Remaining Need |
|-----------|---------------|------------|------------|---------|---------|----------------|
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Award Methodology (Continued)

Code. A four-character field used to identify the award methodology. You create the code using any combination of characters A to Z and 0 to 9.

Title. A 50-character description of this award methodology. You create this description using any combination of valid keyboard characters except the pipe (|) symbol.

Priority. Indicates the order in which the Award Methodology database table is searched. If a student is eligible for two award methodologies, the one with the highest priority is assigned to the student record. Priority ranges from 1 (highest priority) to 999 (lowest priority).

Use Percentages/Use Dollar Amount. Determines whether the self-help aid maximum and gift aid maximum fields use percentages or dollar amounts.

Self-Help Aid Maximum %. The highest percentage amount of the student's unmet need that EDEExpress awards in self-help aid.

Self-Help Aid Maximum \$. The highest total amount in dollars that a student can receive in self-help aid.

Gift Aid Maximum %. The highest percentage amount of the student's unmet need that EDEExpress awards in gift aid.

Gift Aid Maximum \$. The highest total amount in dollars that a student can receive in gift aid.

Criteria. Determines the methodology applied to a given record, based on the queries you have currently created in the query portion of EDEExpress. Using criteria limits the population of students who are considered for this methodology. This field can be left blank.

Note: Parameter queries cannot be used for award methodology criteria.

Fund Code. The code of a fund you want to use for packaging when you use the methodology. You can assign up to 20 funds to an award methodology.

Note: Pell Grant cannot be added to an award methodology. Any student eligible to receive a Pell Grant is awarded the fund before being considered for any other type of aid.

Fund Priority. Determines the order that funds are considered in satisfying the student's unmet need. Fund priority runs from 1 through 20.

School Min. The minimum amount the school awards to a student from this fund. You can set the School Min from 00000 to 99999.

Note: If the fund has a federal yearly maximum, Packaging does not award more than that amount.

Award Methodology (Continued)

School Max. The maximum amount the school awards to a student from this fund. You can set the School Max from 00000 to 99999.

Note: If the fund has a federal yearly maximum, Packaging does not award more than that amount.

Min EFC. The lowest EFC value that a student's ISIR can have and still receive this fund. You can set the min EFC from 000000 to 999999.

Max EFC. The highest EFC value that a student's ISIR can have and still receive this fund. You can set the max EFC from 000000 to 999999.

Remaining Need. Optional. Enables you to award a specific amount of a fund at different levels of remaining need within the packaging process.

Budgets

The Budgets dialog box is used to define student budgets by using a combination of several variables or to establish a single budget for your entire applicant population.

| Question | Possible Answer | Default Answer | Your Answer |
|------------------------------------|--|----------------|-------------|
| Budget Code | 4 characters (A to Z, 0 to 9, +, -, *, #, .) Cannot be blank | N/A | |
| Priority | 1 to 999 Cannot be blank | N/A | |
| Budget Total | 0 to 999999 | N/A | |
| Pell COA | 00000 to 99999 | N/A | |
| Title | 50 characters (any keyboard character except the pipe [] symbol) Cannot be blank | N/A | |
| Criteria | Any non-parameter Packaging query | N/A | |
| Budget Amounts | | | |
| Tuition and Fees | 00000 to 99999 | N/A | |
| Loan Fees | 00000 to 99999 | N/A | |
| Room and Board | 00000 to 99999 | N/A | |
| Books and Supplies | 00000 to 99999 | N/A | |
| Transportation Costs | 00000 to 99999 | N/A | |
| Miscellaneous Amount | 00000 to 99999 | N/A | |
| User Defined Budget Amounts | | | |
| | 00000 to 99999 | N/A | |
| | 00000 to 99999 | N/A | |
| | 00000 to 99999 | N/A | |
| | 00000 to 99999 | N/A | |
| | 00000 to 99999 | N/A | |

Budget Code. A four-character field used to identify the budget. Create the code using any combination of characters A to Z, 0 to 9, +, -, *, and #.

Priority. Indicates the order in which the Budget database table is searched. If a student is eligible for two budgets, the one with the highest priority is assigned to the student record.

Budgets (Continued)

Budget Total. A display-only field that displays the monetary total of all the budget items entered.

Pell COA. Enables you to specify the cost of attendance amount you want to consider when calculating Pell awards. This field can be modified at the record level.

Title. A 50-character description of the budget. Create the title using any combination of valid keyboard characters except the pipe (|) symbol.

Criteria. Determines the budget applied to a given record based on Packaging queries you have currently created in EDExpress. Using criteria limits the population of students who are considered for this budget. This field can be left blank.

Note: Parameter queries cannot be used for budget criteria.

Budget Amounts. Components you use to build your budgets. Enter amounts for the five built-in components and add up to five additional user-defined components as needed.

User Defined Budget Amounts. Components you want to consider as part of the overall student budget that are not covered under Budget Amounts.

User-Defined Formulas

The User-Defined Formulas dialog box enables you to create your own packaging formulas with fields from the Student, User-Defined, and Fund database tables.

| Table | Field Name | Operand | Table | Field Name | Description |
|-------|------------|---------|-------|------------|-------------|
| | | | | | |
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User-Defined Formulas enable you to calculate data by adding, subtracting, multiplying, or dividing two existing fields in the EDEExpress database. For example, subtracting PC (parent contribution) from EFC on each student record can create a field called SC (student contribution). SC can be used in developing queries.

Note: Only numeric user-defined fields can be used in user formula calculations.

Table. Determines where the value you use in field 1 resides. The options are:

S = Student Table

F = Fund Table

U = User-Defined Table

Field Name. Lists all of the fields that are available from the database table chosen in the Table 1 field.

Note: The title of a previously created user-defined formula becomes a field name in the student table, which can then be used in creating another user-defined formula.

Operand. Defines what computation is performed:

+ = Addition

- = Subtraction

***** = Multiplication

/ = Division

User-Defined Formulas (Continued)

Table. Determines where the value you use in field 2 resides. The options are:

S = Student Table

F = Fund Table

U = User-Defined Table

Field Name. Lists all of the fields that are available from the database table chosen in the Table 2 field.

Description. Displays the user-defined name for this formula. Create the code using any combination of 25 characters (A to Z and 0 to 9).

Note: User-defined formulas are optional in Packaging.

SAP Values

SAP values enable you to track the satisfactory academic progress of your students.

| SAP Code | No Packaging Flag | SAP Description |
|----------|-------------------|-----------------|
| | | |
| | | |
| | | |
| | | |
| | | |

The SAP code listing is unlimited; you can create as many SAP values as you choose.

SAP Code. A two-character field EDEExpress uses to identify the code. Use characters A to Z, 0 to 9, +, -, *, #, ., ', %, <, or >.

No Packaging Flag. Select this checkbox if you want the SAP code, after it is assigned, to prevent records from being packaged.

SAP Description. A 50-character title for this SAP value. Use characters A to Z, 0 to 9, +, -, *, #, ., ', %, <, or >.

Note: SAP values are optional in Packaging.

Document Tracking (Global)

Document Tracking is a global function useful in the packaging process, because it gives you the ability to track and manage documents required of your students.

| Question | Possible Answer | Default Answer | Your Answer |
|---|--|------------------|-------------|
| Document Code | 10 characters (A to Z, 0 to 9, +, -, *, #, .) | N/A | |
| Description | 50 characters (A to Z, 0 to 9, +, -, *, #, .) | N/A | |
| Document Query Title | Any non-parameter Global query | N/A | |
| Automatic Request? | Checked = Yes Not checked = No | Not checked = No | |
| Required to Package? | Checked = Yes Not checked = No | Not checked = No | |
| Required for Verification? (Global only) | Checked = Yes Not checked = No | Not checked = No | |
| Reject Reason Codes (Global only) | Up to 20 valid Reject Reason Codes | Blank | |
| Comment Codes (Global only) | Up to 20 valid Comment Codes | Blank | |

Document Code. A 10-character field EDEExpress uses to identify the document. Create the code using any combination of these characters: A to Z, 0 to 9, +, -, *, and #.

Description. A 50-character title for this document. The document description appears on the Document Tracking letter, so you should create a meaningful title.

Document Query Title. Determines the documents applied to a given record based on any non-parameter Global query. Both predefined queries and queries you have created in EDEExpress are available. Choose any one of them to limit the population of students who are assigned this document.

Note: Parameter queries cannot be used for document tracking criteria.

Automatic Request? Determines whether the document defined is automatically assigned when you choose **Add Documents** from the Process menu.

Document Required to Package? Determines whether an award can be generated for the student if this document has not been received. If this option is chosen, you are unable to generate a preliminary award until the document is marked as **Received** or **Waived**.

Document Tracking (Global) (Continued)

Document Required for Verification? Determines whether the document defined is assigned to students selected for verification when you choose **Add Documents** from the Process menu. EDEExpress adds the document only when the Verification Status Code field on the demographic record is not equal to blank. If you select this checkbox, using the Automatic Request option is unnecessary, because EDEExpress requests the document automatically from any student selected for verification.

Reject Reason Codes. You can enter any combination of uppercase letters (A to Z), numbers (0 to 9), and spaces.

Comment Codes. You can enter one ISIR comment code in each of the 20 spaces provided. Any students receiving any of the corresponding comment codes on the ISIRs are assigned the document.

Document Tracking (Packaging)

Document Tracking is also useful in the packaging process, because it gives you the ability to track and manage documents required of your students.

| Question | Possible Answer | Default Answer | Your Answer |
|----------------------|--|------------------|-------------|
| Code | 10 characters (A to Z, 0 to 9, +, -, *, #, .) | N/A | |
| Description | 50 characters (A to Z, 0 to 9, +, -, *, #, .) | N/A | |
| Criteria | Any non-parameter Packaging query | N/A | |
| Automatic Request? | Checked = Yes Not checked = No | Not checked = No | |
| Required to Package? | Checked = Yes Not checked = No | Not checked = No | |

Code. A 10-character field EDEExpress uses to identify the document. Create the code using any combination of these characters: A to Z, 0 to 9, +, -, *, and #.

Description. A 50-character title for this document. The document description appears on the document tracking letter, so you should create a meaningful title.

Criteria. Determines the documents applied to a given record based on any non-parameter Global query. Both predefined queries and queries you have created in EDEExpress are available. Choose any one of them to limit the population of students who are assigned this document.

Note: Parameter queries cannot be used for document tracking criteria.

Automatic Request. Determines whether the document defined is automatically assigned when you choose Add Documents from the Process menu.

Required to Package? Determines whether an award can be generated for the student if this document has not been received. If this option is chosen, you are unable to generate a preliminary award until the document is marked as **Received** or **Waived**.

Additional Setup Worksheets

System Setup

| Question | Possible Answer | Default Answer | Your Answer |
|--|--|-------------------------|-------------|
| Total Number of Award Letters to be Printed per Student? | 1 to 99 | 2 | |
| Maximum Number of Award Letters to be Sent per Student? | 1 to 99 | 5 | |
| Award Letter Type | O = Offer Letter N = Notification Letter | N = Notification Letter | |
| Allow imported Pell EFC to be modified? | Checked = Yes Not checked = No | Checked = Yes | |
| Packaging Results Default Status | O = Offered A = Accepted | A = Accepted | |
| Priority Deadline Date Type | A = Application Received Date P = Processed Date R = Ready Date U = User-Defined Date | P = Processed Date | |
| User Defined Date Name | See online Help in Packaging System Setup | N/A | |
| Default Housing Plans | 1 = On-campus 2 = With parent 3 = Off-campus | 3 = Off-campus | |

Academic Year Profile

| Question | Possible Answer | Default Answer | Your Answer |
|---|--|------------------|-------------|
| Code | 4 characters (A to Z, 0 to 9) Cannot be blank | N/A | |
| Default | Checked = Yes Not checked = No | Not checked = No | |
| Title | 50 characters (any keyboard character except the pipe [] symbol) Cannot be blank | N/A | |
| Pell Grant Formula | 1 = Standard term, credit hour programs (30 weeks) 2 = Standard term, credit hour programs (<30 weeks) 3 = Any term-based credit hour program 4 = Clock hour and credit hour programs without terms 5 = Correspondence study, non term-based program 6 = Correspondence study, term-based program | 1 | |
| Program Proration Percentage | 000.00 to 100.00 | N/A | |
| EFC program length to import from ISIR database | 1 to 12 | 9 | |

| Term Description | Enrollment Status | Pell % | FSEOG % | Grant % | Perkins % | WS % | Subsidized Loan % | Other Loan % |
|------------------|-------------------|--------|---------|---------|-----------|------|-------------------|--------------|
| | | | | | | | | |
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Fund Maintenance

| Question | Possible Answer | Default Answer | Your Answer |
|------------------------------|--|------------------|-------------|
| Fund Code | 8 characters (A to Z, 0 to 9, +, -, *, #, .) Cannot be blank | N/A | |
| Fund Description | 25 characters (any keyboard character except the pipe [] symbol) Cannot be blank | N/A | |
| Aid Type | D = Unsubsidized Loan (Unsub, Need Based) E = Supplemental Educational Opportunity Grant (FSEOG) F = Federal Pell Grant G = Grant K = Federal Perkins Loan L = Other Need Based Loan (NB) N = Non-need based loan (NNB) O = Outside Resources P = Federal Parent Loan for Undergraduate Students (PLUS) R = Grant, Non-Need Based S = Subsidized Loan (Need Based) T = Teacher Education Assistance for College and Higher Education Grants (TEACH Grant) U = Unsubsidized Loan (Unsub, Non-Need Based) V = AmeriCorps W = Federal Work-Study (WS) Y = Other Work-Study Cannot be blank. | N/A | |
| Do not remove if unpackaged? | Checked = Yes Not checked = No | Not checked = No | |

Fund Maintenance (Continued)

| Question | Possible Answer | Default Answer | Your Answer |
|---------------------------------|---|----------------|-------------|
| Remaining Need | <p>Minimum Need/Maximum Need/Award Amount</p> <p>Enabled for funds with the following aid types: D = Unsubsidized Loan (Unsub, Need Based) E = FSEOG G = Grant K = Federal Perkins Loan L = Other Need Based Loan (NB) N = Non-need Based Loan (NNB) P = Federal Parent Loan for Undergraduate Students (PLUS) R = Grant, Non-Need Based S = Subsidized Loan (Sub, Need Based) U = Unsubsidized Loan (Unsub, Non-Need Based) W = Federal Work-Study (FWS) Y = Other Work-Study</p> <p>Disabled for funds with the following aid types: F = Federal Pell Grant O = Outside Resources T = Teacher Education Assistance for College and Higher Education Grants (TEACH Grant) V = AmeriCorps</p> | N/A | |
| Criteria | Any non-parameter Packaging query | N/A | |
| Beginning Balance | 000000000 to 999999999 | N/A | |
| Adjustment to Beginning Balance | -999999999 to 999999999 | N/A | |
| Funds Awarded | 000000000 to 999999999 | N/A | |
| Current Balance | 000000000 to 999999999 | N/A | |

Packaging Remaining Need Dialog Box

| Question | Minimum Need | Maximum Need | Amount Awarded |
|-----------------|-----------------------------------|-----------------------------------|-----------------------------------|
| Possible Answer | 00000 to 99999 Cannot be blank | 00000 to 99999 Cannot be blank | 00000 to 99999 Cannot be blank |
| Default Answer | N/A | N/A | N/A |
| Your Answer | | | |
| Your Answer | | | |
| Your Answer | | | |

Award Methodology

| Question | Possible Answer | Default Answer | Your Answer |
|-----------------------------------|--|-----------------|-------------|
| Code | 4 characters (A to Z, 0 to 9) Cannot be blank | N/A | |
| Title | 50 characters (any keyboard character except the pipe [] symbol) Cannot be blank | N/A | |
| Priority | 1 to 999 Cannot be blank | N/A | |
| Use Percentages/Use Dollar Amount | Use Percentages or Use Dollar Amounts (option button) | Use Percentages | |
| Self-Help Aid Maximum % | 0 to 100 | 100% | |
| Self-Help Aid Maximum \$ | 0 to 99999 | \$0 | |
| Gift Aid Maximum % | 0 to 100 | 100% | |
| Gift Aid Maximum \$ | 0 to 99999 | \$0 | |
| Criteria | Any non-parameter Packaging query | N/A | |

[illegible]

Budgets

| Question | Possible Answer | Default Answer | Your Answer |
|------------------------------------|--|----------------|-------------|
| Budget Code | 4 characters (A to Z, 0 to 9, +, -, *, #, .) Cannot be blank | N/A | |
| Priority | 1 to 999 Cannot be blank | N/A | |
| Budget Total | 0 to 999999 | N/A | |
| Pell COA | 00000 to 99999 | N/A | |
| Title | 50 characters (any keyboard character except the pipe [] symbol) Cannot be blank | N/A | |
| Criteria | Any non-parameter Packaging query | N/A | |
| Budget Amounts | | | |
| Tuition and Fees | 00000 to 99999 | N/A | |
| Loan Fees | 00000 to 99999 | N/A | |
| Room and Board | 00000 to 99999 | N/A | |
| Books and Supplies | 00000 to 99999 | N/A | |
| Transportation Costs | 00000 to 99999 | N/A | |
| Miscellaneous Amount | 00000 to 99999 | N/A | |
| User Defined Budget Amounts | | | |
| Lab Fees (Example) | 00000 to 99999 | N/A | |
| | 00000 to 99999 | N/A | |
| | 00000 to 99999 | N/A | |
| | 00000 to 99999 | N/A | |
| | 00000 to 99999 | N/A | |

User-Defined Formulas

| Table | Field Name | Operand | Table | Field Name | Description |
|-------|------------|---------|-------|------------|-------------|
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SAP Values

| SAP Code | No Packaging Flag | SAP Description |
|----------|----------------------|-----------------|
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Document Tracking (Global)

| Question | Possible Answer | Default Answer | Your Answer |
|--|--|------------------|-------------|
| Document Code | 10 characters (A to Z, 0 to 9, +, -, *, #, .) | N/A | |
| Description | 50 characters (A to Z, 0 to 9, +, -, *, #, .) | N/A | |
| Document Query Title | Any non-parameter Global query | N/A | |
| Automatic Request? | Checked = Yes Not checked = No | Not checked = No | |
| Document Required to Package? | Checked = Yes Not checked = No | Not checked = No | |
| Document Required for Verification? (Global only) | Checked = Yes Not checked = No | Not checked = No | |
| Reject Reason Codes (Global only) | Up to 20 valid Reject Reason Codes | Blank | |
| Comment Codes (Global only) | Up to 20 valid Comment Codes | Blank | |

Document Tracking (Packaging)

| Question | Possible Answer | Default Answer | Your Answer |
|----------------------|--|------------------|-------------|
| Code | 10 characters (A to Z, 0 to 9, +, -, *, #, .) | N/A | |
| Description | 50 characters (A to Z, 0 to 9, +, -, *, #, .) | N/A | |
| Criteria | Any non-parameter Packaging query | N/A | |
| Automatic Request? | Checked = Yes Not checked = No | Not checked = No | |
| Required to Package? | Checked = Yes Not checked = No | Not checked = No | |