

September 2020

RE: EDEExpress for Windows 2021-2022, Release 1.0

Dear EDEExpress Users:

Federal Student Aid is pleased to announce the availability of EDEExpress for Windows 2021-2022, Release 1.0. This is the initial EDEExpress software release for the 2021-2022 award cycle and includes the Application Processing and Packaging modules, as well as Global functionality such as Security setup, Document Tracking, and User Database.

About this Cover Letter

This letter includes the following information:

- Overview of EDEExpress 2021-2022, Release 1.0
- Login information for EDEExpress 2021-2022
- Product Registration Information
- A list of 2021-2022 enhancements available in Release 1.0
- Enrollment instructions for FAA Access to CPS Online
- Release 1.0 software and user documentation download instructions
- Microsoft Windows compatibility and Section 508 compliance notices
- Contact information for technical support and additional assistance

Important Note for Packaging Users: See the note under the Packaging section later in this letter for important information regarding the Federal Pell Grant (Pell Grant) award limits in the EDEExpress 2021-2022 Release 1.0 Packaging module.

EDEExpress 2021-2022, Release 1.0

EDEExpress 2021-2022, Release 1.0 consists of two software modules:

- Application Processing
- Packaging

In addition, Global functionality applicable to all modules, such as Security setup, Document Tracking setup and entry, and User Database setup and entry, is added during any installation of EDEExpress. Release 1.0 also includes setup, entry, import, and printing functionality for the College Financing Plan (previously called the Financial Aid Shopping Sheet).

Note: EDEExpress 2021-2022, Release 1.0 uses the responsive template implemented in 2020-2021 for the College Financing Plan document. If further template updates are implemented for the 2021-2022 cycle, we will update EDEExpress 2021-2022 in a future release.

Release 1.0 does not overwrite your EDEExpress databases from prior cycles; instead, it creates a new database specific to 2021-2022 data. You can pull forward certain EDEExpress 2020-2021 data elements for use in 2021-2022, including setup parameters, student demographic data, and user-defined data fields, using the Prior Year Import feature.

Logging into EDEExpress 2021-2022

When you first access EDEExpress 2021-2022 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, EDEExpress requires that you immediately define a new password for the SYSADMIN. EDEExpress passwords must be a minimum of 12 characters in length 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**).

The SYSADMIN user ID provides access to critical administrative functions only 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 2021-2022, Release 1.0 Desk Reference*, which is available for download from the Software and Other Tools page of the Information for Financial Aid Professionals (IFAP) Web site (ifap.ed.gov/software-and-other-tools).

Product Registration

New for 2021-2022! EDEExpress 2021-2022 includes a limited-time voluntary product registration feature intended to assist with future planning and enhancements. We designed this feature as a quick and easy process that should require minimal time and effort for your staff, particularly if you are a returning EDEExpress user and you opt to take advantage of the auto-fill option (see separate sub-section below).

The product registration process contains questions about EDEExpress modules and specific functionality you currently use and your student population size. It also asks for your feedback and recommendations for EDEExpress, and gathers data on whether (or how) you use EDEExpress in combination with other systems in order to better understand your needs as a user. After you have completed registration, you can submit your registration response to Federal Student Aid and complete the process.

Access to the product registration is limited to one EDEExpress user at any given time. If you are a multi-campus school using a shared EDEExpress database, we recommend you limit your response to the main campus user to avoid duplicate or conflicting feedback.

The Startup Information pane will display reminder messages reminding you to complete and submit your voluntary product registration responses by the **September 15, 2021** deadline. You (and other users defined in your EDEExpress database) are prompted to complete the product registration process each time EDEExpress 2021-2022 is accessed (in Release 1.0, Release 2.0, and any potential subsequent releases) prior to the deadline unless a response has already been submitted. EDEExpress automatically removes the product registration prompt from the Startup Information pane if your PC's system date is after September 15, 2021.

See the specific sections below for more information on completing the Product Registration process:

Accessing Product Registration

To access the product registration feature, click **Fill Out** in the Startup Information pane of the EDEExpress Desktop. The pane will display reminders to complete and submit your complete product registration responses by the deadline.

Auto-Fill Option

We enhanced the product registration process for EDEExpress 2021-2022 to add functionality that gathers information about your EDEExpress use by directly accessing and analyzing EDEExpress databases on your PC for the current and, optionally, previous cycles. This information automatically pre-populates responses for the product registration, saving you research and entry time.

To take advantage of this automatic update option, select **Yes, I'd like to have the system pre-populate some of the product registration answers** on the initial Welcome page. To include data about your EDEExpress 2020-2021 use in addition to 2021-2022, identify the location of your EDEExpress 2020-2021 database (expres21.accdb) in the **File** field provided before clicking **Next** to proceed with the process.

EDEExpress highlights information transferred to the product registration from your current and prior-year databases in blue. You can manually edit this transferred information as needed. The blue highlighting is removed from fields updated by the automatic process and then edited by an EDEExpress user subsequently after navigating away from and back to the page in question.

The automatic update process can only be used once per EDEExpress 2021-2022 database.

Entering and Saving Product Registration Responses

The next section of the product registration is comprised of several pages of general questions about your school, your student population, your general use of EDEExpress, and your overall level of satisfaction with EDEExpress, and captures any suggestions or recommendations for future enhancements.

The subsequent sections of the product registration ask about the specific EDEExpress modules you use, which functions you use in each module, and your technical environment. You are presented with individual pages with questions specific to the Global, Application Processing and Packaging, Direct Loan, Pell, and TEACH Grant

modules, followed by a page asking about your EDEExpress installation, your operating system, and whether you use EDEExpress in combination with an external system.

At any time during completion of the product registration, you can save your progress and exit the process by clicking **Save** at the bottom of the screen. EDEExpress stores your progress and returns you to the same location in the product registration the next time you access it. You can also click **Close** to exit the product registration process without saving. Use the **Back** and **Next** buttons to navigate to previous or subsequent pages in the process.

Note: If you complete the automatic update process, some questions may already be completed for you and highlighted in blue, indicating they were updated based on information in your current or prior-year EDEExpress database.

Bypassing Product Registration

Although Federal Student Aid is eager to hear your feedback and learn more about how your school or institution uses EDEExpress, your participation in the product registration process is optional. If you prefer not to complete the product registration, you can ignore messages regarding product registration that appear in the Startup Information pane until up to a month prior to the 9/15/2021 submission deadline. In the month prior to the deadline, the product registration process will initiate each time you start the EDEExpress 2021-2022 software and you will need to close it manually.

Alternatively, the Welcome page of the product registration process includes an option to bypass entry and submission of your responses and indicate to Federal Student Aid that you are not participating. On the Welcome page, select **I would not like to provide feedback to be used to improve the product** and click **Next**. A page will display asking you to verify that you do not want to complete the product registration. You can click **Submit** on this page to send a blank response to Federal Student Aid or you can click the **Click Here** link to return to the Welcome page and choose a different option for completing the process.

Product Registration Completion and Submission

An interactive summary report is displayed at the end of the product registration process, prior to the final submission step. You can click sections of the report to return to specific questions and revise your answers. If you are satisfied with all your responses, click **Submit** to send your product registration information to Federal Student Aid using the e-mail client on your PC.

Release 1.0 Enhancements

The following product enhancements have been incorporated into EDEExpress 2021-2022, Release 1.0.

General

- **Updated Cycle References and Message Classes** – We updated software labels, help system topics, reports, and other functionality throughout EDEExpress to reference the 2021-2022 cycle. Message classes with cycle indicators are also updated for 2021-2022 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 2021-2022, see the Processing Codes section of the *2021-2022 Electronic Data Exchange (EDE) Technical Reference*, available on the IFAP Web site.

- **Updated EDEExpress Icon and Splash Screen Color to Match 2021-2022 FAFSA** – The EDEExpress software’s Windows icon and splash screen (which is displayed when you first start the software) have been color-coded green to match the 2021-2022 Free Application for Federal Student Aid (FAFSA®) form.
- **Accessibility Enhancements to EDEExpress Print Functionality** – To improve accessibility for visually-impaired users and more effectively conform with requirements in Section 508 of the Rehabilitation Act, we enhanced print functionality in EDEExpress 2021-2022 to include a new Hypertext Markup Language (HTML) output option, which is more adaptable to screen reader technology. We also redesigned multiple reports and lists in EDEExpress to convey information in a more accessible, readable format.

You can now designate a default report format (**PDF** or **HTML**) for each EDEExpress user in Global System setup (**Tools, Setup, Global, System**). Your default report format selection is selected automatically in the new **Format** field added to the Print dialog box for each EDEExpress module, and can be modified as needed to the other format selection for individual reports. The new HTML format is only available when printing to the screen, to a file, or to e-mail (if available) for the report output destination.

When printing in HTML format, note that report page breaks may not appear in logical locations and page numbers are not used.

Application Processing

The following Application Processing enhancement is available in EDEExpress 2021-2022:

- **New Schedule 1 Data Fields on ISIR** – We updated the ISIR for 2021-2022 to add IRS Data Flag fields for the student and parent “Filed a Schedule 1?” fields, which are now updated automatically by the IRS for online and mobile FAFSA applicants who use the IRS Data Retrieval Tool (DRT). You can use the IRS Data Flag fields (in the FAA Information section of the ISIR) to determine whether or not the value

was transferred from the IRS by the student or parent, whether the transferred values were subsequently changed, and other potential scenarios.

Packaging

While no major changes have been made to the EDEExpress Packaging module for 2021-2022, note the following considerations when using Release 1.0:

Federal Pell Grant Award Limits in Release 1.0 Packaging

At this time, the U.S. Department of Education's (ED's) Fiscal Year 2021 Appropriation has not been approved. Therefore, the Federal Pell Grant Payment and Disbursement Schedule used by the Release 1.0 Packaging module is based on 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.

After ED's Fiscal Year 2021 Appropriation is finalized, we will update the Pell Grant Payment Schedule, if necessary, through a future release of EDEExpress. If you use the EDEExpress Packaging module to award Pell Grants, you may want to wait until it is known if the Pell Payment Schedule changes.

Discontinuation of Subsidized Loan Eligibility for Graduate/Professional Students

As a result of the Budget Control Act of 2011, SEC. 502, Direct Subsidized Loans cannot be awarded to graduate and professional students (college grade level 6 and 7) if the loan period begins on or after July 1, 2012. We have not modified EDEExpress to accommodate this legislative change, so we recommend that you adjust your Packaging setup accordingly to ensure you are taking this requirement into account.

There are several possible approaches you can take in Packaging setup to prevent the package process from awarding subsidized loans to graduate or professional students, including the use of queries in Fund Maintenance or Award Methodology setup.

For more guidance on how you can modify Packaging setup to address this legislative change, see the [January 11, 2012 electronic announcement](#) posted to the IFAP Web site.

Enrollment for FAA Access to CPS Online

To ensure your school can take full advantage of the EDEExpress 2021-2022 interface with the FAA Access to CPS Online Web site, the Primary Destination Point Administrator (DPA) of the TG number used to send and receive FAFSA and ISIR correction data should verify your enrollment status.

- If your school is enrolled for 2020-2021, your enrollment status rolls over to 2021-2022.
- Your school's Primary DPA must actively confirm the FAA Access to CPS Online services and users associated with your school's TG number on a periodic basis. Monitor the IFAP Web site and e-mail notifications you may receive from Federal Student Aid for announcements on when you need to confirm services and users on behalf of your school.

- If your school is not enrolled, your school’s Primary DPA can complete the enrollment for FAA Access to CPS Online site services for your school through the Student Aid Internet Gateway (SAIG) Enrollment Web site, located at fsawebenroll.ed.gov.
- An SAIG-FAA User Statement must be printed by the Primary DPA and signed by new users of the FAA Access to CPS Online site. While you do not mail SAIG-FAA User Statements to Federal Student Aid’s Participation Management system, you must retain signed copies at your school.

All Primary DPAs and other FAA Access users at your school can obtain their FSA User IDs (if they have not already done so) by completing the FSA User ID enrollment process. For more detailed information on the FSA User ID creation process, see the [April 6, 2009 Electronic Announcement](#) posted on our IFAP Web site.

You can enter your TG Number, School Code, and Application Save/Restore Password (used for initial applications only) in EDEExpress FAA Access setup (**Tools, Setup, Global, FAA Access**) or enter them each time you connect to FAA Access to CPS Online through the FAFSA and Student Inquiry tabs in EDEExpress. You will be prompted separately for your FSA User ID and password, which are not stored in the EDEExpress database and must be provided each time you log in to FAA Access to CPS Online.

How to Get EDEExpress and Documentation

You can download Release 1.0 and related user documentation from the “Software and Other Tools” page of the IFAP Web site (ifap.ed.gov/software-and-other-tools).

EDEExpress Software

Instructions for downloading EDEExpress are located in the “Downloading Documentation and Software from the IFAP Web Site” section of the *Installation Guide for EDEExpress for Windows 2021-2022*.

Note: Some organizations restrict their employees from downloading programs from Internet sites. If you have trouble downloading, contact your technical support staff to ensure that you have full download rights.

User Documentation

The most recent versions of user documentation can be downloaded from the IFAP Web site. These documents include:

- *EDEExpress for Windows 2021-2022 Installation Guide*
- *EDEExpress for Windows 2021-2022, Release 1.0 Desk Reference*
- Technical References

The 2021-2022 versions of the *EDE Technical Reference* and the *EDEExpress Packaging Technical Reference* provide technical guidance and record layouts for schools or other organizations that need to interface local software or mainframe systems with EDEExpress 2021-2022. The *EDEExpress Packaging Technical Reference* also contains worksheets

you can use to help plan and implement your Packaging module setup in EDEExpress 2021-2022.

Compatibility and Compliance

Microsoft Windows Information

EDEExpress 2021-2022 is supported currently for the Microsoft Windows 8.1 and Windows 10 operating systems only. For more information on minimal and optimal system recommendations, see the *EDEExpress 2021-2022 Installation Guide* and the [August 27, 2020 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 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 ed.gov/offices/OSFAP/services/fsatechsubscribe.html.