

April 2021

**RE: EDEExpress for Windows 2021-2022, Release 2.0**

Dear EDEExpress Users:

Federal Student Aid is pleased to announce the availability of EDEExpress for Windows 2021-2022, Release 2.0. Release 2.0 adds Federal Pell Grant (Pell Grant), William D. Ford Federal Direct Loan (Direct Loan), and Teacher Education Assistance for College and Higher Education (TEACH) Grant functionality for the 2021-2022 award cycle.

**About this Cover Letter**

This letter includes the following information:

- Overview of EDEExpress 2021-2022, Release 2.0
- Login information for EDEExpress 2021-2022
- Product Registration information
- Important notices and reminders regarding:
  - College Financing Plan functionality in Release 2.0
  - Master Promissory Note (MPN), MPN Manifest, and Disclosure Statement printing
  - Pell Grant payment and disbursement schedules in Release 2.0
- Information regarding Release 2.0 enhancements
- Microsoft Windows compatibility and Section 508 compliance notices
- Contact information for technical support and additional assistance

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

For more information regarding the availability of the 2021-2022 COD System, see the [March 10, 2021 electronic announcement](#).

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

# EExpress for Windows 2021-2022, Release 2.0 Overview

EExpress 2021-2022, Release 2.0 adds three software modules:

- Pell Grant
- Direct Loan
- TEACH Grant

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

EExpress 2021-2022, Release 2.0 can be installed as an upgrade to Release 1.0 (posted in September 2020). You must have Release 1.0 installed to run an upgrade (or “custom”) installation of Release 2.0.

**Reminder:** Before upgrading to Release 2.0, ensure you have a reliable backup copy of your current EExpress 2021-2022 production database (**expres22.accdb**).

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

If you have not previously installed EExpress 2021-2022, you can proceed directly to a Stand Alone Full or Network Server/Workstation Full installation of Release 2.0. Be aware, however, that a Stand Alone Full or Network Server/Workstation Full installation loads a new, blank EExpress 2021-2022 database to your system. If you have an existing 2021-2022 database, a Stand Alone Full or a Network Server/Workstation Full installation of Release 2.0 will overwrite your database and all previously entered 2021-2022 data will be lost.

For more technical guidance and information regarding the EExpress installation process, see the *Installation Guide for EExpress for Windows 2021-2022*.

## Logging into EExpress 2021-2022

If you upgrade from EExpress 2021-2022, Release 1.0 to Release 2.0, your User IDs, passwords, and other security settings are carried forward to Release 2.0 and do not need to be recreated.

If you have not installed EExpress 2021-2022 prior to Release 2.0, when you first access the software after installation, the default User ID is SYSADMIN and the default password is **\$y\$tem Adm1n**. Be sure to include the space between **\$y\$tem** and **Adm1n** (the two parts of the default password).

After you enter the default user ID and password, EExpress 2021-2022 requires that you immediately define a new password for the SYSADMIN. New passwords must be a minimum of 12 characters and must include at least one uppercase letter, one lowercase letter, one number, and one keyboard character that is not a letter or number (such as an exclamation mark or other punctuation symbol). You can adjust the minimum password length and other requirements in the Password Setup dialog box (**Tools, Setup, Global, Password Setup**).

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

For more information on security setup, see EDEExpress Help in the software and the *EDEExpress for Windows 2021-2022 Installation Guide*.

## **College Financing Plan Functionality in EDEExpress 2021-2022**

In the [November 12, 2020 electronic announcement](#), Federal Student Aid's Office of Postsecondary Education announced the availability of new College Financing Plan templates for the 2021-2022 award year, including separate templates for undergraduate students and for graduate/professional students.

EDEExpress 2021-2022, Release 2.0 continues to offer College Financing Plan functionality that is based on the single template responsive design implemented in the 2020-2021 award year. If your school chooses to adopt the 2021-2022 College Financing Plan templates, you will need to use a system other than EDEExpress to create student records and generate the College Financing Plan document.

For more information on the 2021-2022 College Financing Plan enhancements, including revised HTML specifications file, technical guide, and a set of Frequently Asked Questions, visit the College Financing Plan page at <https://www2.ed.gov/policy/highered/guid/aid-offer/index.html>.

## **MPN, MPN Manifest, and Disclosure Statement Printing Reminder**

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

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

For more information and guidance on the Direct Loan MPN, MPN manifest, and Disclosure Statement, see Volume II, Section 1 of the *2021-2022 COD Technical Reference*.

## **Federal Pell Grant Payment and Disbursement Schedules in EDEExpress 2021-2022, Release 2.0**

Federal Student Aid announced the 2021-2022 Pell Grant Payment and Disbursement schedules in [Dear Colleague Letter GEN-21-01](#), posted on January 22, 2021.

As noted in the Dear Colleague Letter, the maximum 2021-2022 Pell Grant award for a full-time student with an Expected Family Contribution (EFC) of zero is \$6,495, an increase of \$150 over the previous maximum of \$6,345. The maximum Pell-eligible EFC increased for 2021-2022 from 5711 to 5846. As a result of the EFC increase, some applicants who were initially processed by the Central Processing System (CPS) as ineligible for a 2021-2022 Pell Grant award due to their EFC are now Pell-eligible.

The CPS began processing 2021-2022 application and correction records according to the revised Pell schedules on March 28, 2021. The CPS also reprocessed 2021-2022 Institutional Student Information Records (ISIRs) on March 30, 2021 for students who applied or submitted corrections before March 28, 2021 and, under earlier formulas, were designated as not being Pell-eligible, but who are now eligible for a 2021-2022 Pell Grant under the new formulas due to their EFC.

For more information and a complete description of the changes for the 2021-2022 award year, see Dear Colleague Letter GEN-21-01 and the [March 4, 2021 electronic announcement](#) regarding implementation of the 2021-2022 Pell schedules.

EDExpress 2021-2022, Release 2.0 incorporates the 2021-2022 Pell schedules into the following functionality (listed by module):

## **Global**

We updated the Pell Grant Schedule tab available under **Tools, Browse, Global** to reflect the 2021-2022 Pell Grant payment and disbursement schedules.

## **Packaging**

We updated the Package and Repackage processes to award Pell Grants (Packaging Aid Type = **F**) according to the 2021-2022 Pell Grant payment and disbursement schedules.

If you create Packaging records by importing ISIR data, you should import any new ISIR transactions you received for student records impacted by the March 29, 2021 reprocessing into the Packaging module. This helps ensure the Pell Eligibility field on the Packaging record is set correctly. You must unpackage existing Packaging records at a Packaging Status of **P** (Packaged), **M** (Manually Adjusted), or **H** (Hand Packaged) before you can import new ISIR transactions. Before unpackaging these records, you may want to print the Packaging Record report for each student so you have a record of the funds you originally awarded to them (in case you need to recreate the awards).

After you import all reprocessed ISIR data into the Release 2.0 Packaging module, run the Repackage process for all Pell-eligible Packaging records, unless you already adjusted Pell Grant awards on these records prior to installing Release 2.0 to match the scheduled award amounts in Dear Colleague Letter GEN-21-01. The Repackage process will update the Pell Grant awards for your Packaging records to follow the 2021-2022 Pell Grant payment and disbursement schedules.

## Pell Grant

We updated the Pell module's Calculate Award Amount for Entire School Year function, available on the Process menu from the EDEExpress main menu and the Origination (Pell Grant) tab, to follow the 2021-2022 Pell Grant payment and disbursement schedules.

## 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 2.0 or 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 EDEXpress 2020-2021 use in addition to 2021-2022, identify the location of your EDEXpress 2020-2021 database (expres21.accdb) in the **File** field provided before clicking **Next** to proceed with the process.

EDEXpress 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 EDEXpress user subsequently after navigating away from and back to the page in question.

The automatic update process can only be used once per EDEXpress 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 EDEXpress, and your overall level of satisfaction with EDEXpress, and captures any suggestions or recommendations for future enhancements.

The subsequent sections of the product registration ask about the specific EDEXpress 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 EDEXpress installation, your operating system, and whether you use EDEXpress 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. EDEXpress 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 EDEXpress database.

## Bypassing Product Registration

Although Federal Student Aid is eager to hear your feedback and learn more about how your school or institution uses EDEXpress, 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 EDEXpress 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 2.0 Enhancements

The following product enhancements have been incorporated into EDEExpress 2021-2022, Release 2.0.

**Note:** Some enhancements listed below were originally made available to users in Release 1.0. We are repeating the enhancements here for the benefit of users installing EDEExpress 2021-2022 for the first time. For more information on the 2021-2022 enhancements to Application Processing, Packaging, and Global functionality introduced in Release 1.0, see the *EDEExpress for Windows 2021-2022, Release 1.0 Cover Letter*.

### General Changes

- **Updated Cycle References and Message Classes** – We updated software labels, help topics, reports, and other functionality throughout EDEExpress to reference the 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*. For more information regarding message classes used by the COD System in 2021-2022, see Volume III, Section 2 of the *2021-2022 COD Technical Reference*.

- **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<sup>®</sup>) 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.

- **Updated RSS Feed Pane for EDEExpress Desktop** – We updated settings for the RSS Feed pane to access and display links for current What’s New postings.

**Important Note:** If you plan to use the RSS Feed pane, we recommend you leave the RSS Feed field in the Desktop Settings setup dialog box (**View, Desktop Settings**) set to the default **What’s New** value. The Calendar and Podcasts options for the RSS Feed are not currently active.

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

We updated valid date ranges for the 2021-2022 award year to synchronize EDEExpress with the COD System edits and federal policy. The following valid date ranges are active in Release 2.0.

<b>Field</b>	<b>Valid Date Range</b>
Pell Grant Enrollment Date	10/1/2020 to 6/30/2022
Pell Grant Payment Period Start Date	10/1/2020 to 6/30/2022
Pell Grant Disbursement Date*	10/1/2020 to 9/30/2027*
TEACH Grant Enrollment Date, Payment Period Start Date, and Disbursement Date	On or after 1/1/2021
Direct Loan Date of Birth	1/1/1922 to 12/31/2013
Direct Loan Loan Period Begin Date	On or before 6/30/2022
Direct Loan Loan Period End Date	On or after 7/1/2021
Direct Loan Academic Year Start Date	On or before 6/30/2022
Direct Loan Academic Year End Date	On or after 7/1/2021
Direct Loan Disbursement Date (all loan types)	10/1/2020 to 12/28/2025

\* Although EDEExpress accepts any date on or after 10/1/2020, the valid 2021-2022 date range for Pell Grant disbursement records is from the date the 2021-2022 Pell schedules are posted to 9/30/2027.

## Direct Loan Enhancements

The following related enhancement is available in the Direct Loan module in Release 2.0:

### *Entry*

- **New End-of-Entry Warning Edit for Informed Borrowing Fields** – We added Direct Loan end-of-entry warning edit 4050, which is generated when you create a Direct Loan actual disbursement (Disbursement Release Indicator = True) for a loan record with at least one blank informed borrowing field. The edit message warns you that the COD System may reject the disbursement due to missing informed borrowing information (which may indicate the borrower needs to complete the Annual Student Loan Acknowledgement process on Federal Student Aid’s [studentaid.gov](http://studentaid.gov) Web site.

In EDEExpress, the informed borrowing fields (Informed Borrowing Complete, Informed Borrowing Completion Date, and Informed Borrowing Complete) are located on the Inform Borr sub-tab of the Origination (Direct Loan) tab. To resolve this warning edit for impacted students, you should first ensure you have imported all response data sent by the COD System, including any Informed Borrowing Response (message class CRIB22OP) files. If this does not resolve the warning edit, you can update the three fields with the student’s informed borrowing results manually on the Inform Borr sub-tab, using Direct Loan Multiple Entry, or by importing a Direct Loan External Change file.

## 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](#).

### Section 508 Compliance

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

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

## **Getting Help**

### **If You Have Technical Support Questions**

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

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

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

### **If You Have Questions Regarding the COD System**

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