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Technical Reference for

# EDExpress Packaging

2014-2015

U.S. Department of Education



F E D E R A L  
S T U D E N T A I D

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# Record Descriptions

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## 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.

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# 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

**Telecommunications Device for the Deaf (TDD/TTY):** 800/511-5806

**Fax:** 319/665-7662

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

## FSATECH

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

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

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# 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

**New for 2014-2015!** We expanded the length of the EFC, Pell EFC, and Parent Contribution fields to six digits in the Packaging External Add and External Change import record layouts to coincide with the expansion of the corresponding fields in the ISIR for 2014-2015. We also increased the length of the Total Income field in the record layouts to nine characters, consisting of eight digits plus a leading negative sign (-) for negative numbers.

## 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, except those with packaging status **N** (Not Ready to Package), in the Packaging database 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.



## 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

## Packaging Import External Add Record Layout (Continued)

Field #	Start Position	End Position	Field Length	Field Name	Valid Field Content	Justify
7	51	51	1	Middle Initial	Uppercase letters A to Z Can be blank	Left
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 20140101 to 20151231	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

## Packaging Import External Add Record Layout (Continued)

Field #	Start Position	End Position	Field Length	Field Name	Valid Field Content	Justify
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
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 20140101 to 20151231	Left
49	277	277	1	Low Tuition	0 or Blank 1 = \$0 2 = \$1 to \$268 3 = \$269 to \$536 4 = \$537 to \$804	Right
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"> <li>- at least one valid character</li> <li>- all characters in the range of ASCII 33 to 126, except for the following twelve characters: &lt;&gt; ( ) [ ] \ , ; : " @</li> <li>- period cannot be first, last or adjacent to another period</li> </ul> <p>After the "at" sign:</p> <ul style="list-style-type: none"> <li>- at least one valid character</li> <li>- only letters, digits, hyphen, underscore and period (uppercase letters A to Z, lowercase letters a to z, numbers 0 to 9, - , _ , .)</li> <li>- hyphen, underscore and period cannot be first, last, or adjacent to a period</li> </ul> <p>Can be blank</p> <p>If blank, and a demo record exists for the student, no update is made</p>	Left
	<b>Total Bytes</b>	<b>395</b>				

# 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"> <li>- at least one valid character</li> <li>- all characters in the range of ASCII 33 to 126, except for the following twelve characters: &lt; &gt; ( ) [ ] \ , ; : " @</li> <li>- period cannot be first, last or adjacent to another period</li> </ul> <p>After the "at" sign:</p> <ul style="list-style-type: none"> <li>- at least one valid character</li> <li>- only letters, digits, hyphen, underscore and period (uppercase letters A to Z, lowercase letters a to z, numbers 0 to 9, -, _, .)</li> <li>- hyphen, underscore and period cannot be first, last, or adjacent to a period</li> </ul> <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"> <li>- at least one valid character</li> <li>- all characters in the range of ASCII 33 to 126, except for the following twelve characters: &lt;&gt;()[]\,;:"@</li> <li>- period cannot be first, last or adjacent to another period</li> </ul> <p>After the "at" sign:</p> <ul style="list-style-type: none"> <li>- at least one valid character</li> <li>- only letters, digits, hyphen, underscore and period (uppercase letters A to Z, lowercase letters a to z, numbers 0 to 9, -, _, .)</li> <li>- hyphen, underscore and period cannot be first, last, or adjacent to a period</li> </ul> <p>Can be blank If blank, and a demo record exists for the student, no update is made</p>	Left
	<b>Total Bytes</b>	<b>505</b>				

## 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)

<b>Field #</b>	<b>Field Length</b>	<b>Field Name</b>	<b>Valid Field Content</b>	<b>Justify</b>
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

## Packaging Import Change Field Numbers Record Description (Continued)

Field #	Field Length	Field Name	Valid Field Content	Justify
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
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

## Packaging Import Change Field Numbers Record Description (Continued)

Field #	Field Length	Field Name	Valid Field Content	Justify
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
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

## Packaging Import Change Field Numbers Record Description (Continued)

Field #	Field Length	Field Name	Valid Field Content	Justify
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
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

## Packaging Import Change Field Numbers Record Description (Continued)

Field #	Field Length	Field Name	Valid Field Content	Justify
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 20140101 to 20151231	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 20140101 to 20151231	Right
0303	6	Parent Contribution	000000 to 999999	Right
0304	1	Low Tuition	0 or Blank 1 = \$0 2 = \$1 to \$268 3 = \$269 to \$536 4 = \$537 to \$804	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
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.

## Packaging Import Add Funds Amount Record Layout (Continued)

Field #	Start Position	End Position	Field Length	Field Name	Valid Field Content
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.
17	97	104	8	Fund Code 7	As defined in Setup. Must be Fund Code name existing on database.
18	105	109	5	Fund Value 7	Valid Amount for Current Total on student record Awarded Funds grid.
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.
		<b>Total Bytes</b>	<b>148</b>		

## 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

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## 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 sheets 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	
Use Low Tuition?	Checked = Yes Not checked = No	Not checked = No	
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**.

## System Setup (Continued)

***Allow imported Pell EFC to be modified?*** Determines whether the imported Pell EFC field 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**.

***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**.

***Use Low Tuition?*** Combined with the low tuition flag field on the Awards tab, this option tells the Packaging system to use the low tuition tables to determine the Pell award amount.

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

## Academic Year Profile (Continued)

**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. 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 EExpress. 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	00000000 to 99999999 DISPLAY ONLY after save.	N/A	
Adjustment to Beginning Balance	-99999999 to 99999999	N/A	
Funds Awarded	00000000 to 99999999	N/A	
Current Balance	00000000 to 99999999	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 EDExpress 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.

## Fund Maintenance (Continued)

***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.

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## 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

<b>Question</b>	<b>Minimum Need</b>	<b>Maximum Need</b>	<b>Award Amount</b>
<b>Possible Answer</b>	00000 to 99999 Cannot be blank	00000 to 99999 Cannot be blank	00000 to 99999 Cannot be blank
<b>Default Answer</b>	N/A	N/A	N/A
<b>Your Answer</b>			
<b>Your Answer</b>			
<b>Your Answer</b>			

**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.

**Award Amount.** 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.

<b>Question</b>	<b>Possible Answer</b>	<b>Default Answer</b>	<b>Your Answer</b>
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	

<b>Fund Code</b>	<b>Fund Priority</b>	<b>School Min</b>	<b>School Max</b>	<b>Min EFC</b>	<b>Max EFC</b>	<b>Remaining Need</b>



## 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.

## Award Methodology (Continued)

**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.

**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	
<b>Budget Amounts</b>			
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	
<b>User Defined Budget Amounts</b>			
	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 EDEExpress. 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.

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## 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

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.

## User-Defined Formulas (Continued)

**Operand.** Defines what computation is performed:

- + = Addition
- = Subtraction
- \* = Multiplication
- / = Division

**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.

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## 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.

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## 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
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 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	

**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**.



## Document Tracking (Global) (Continued)

***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.

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## 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 Pages

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## 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	
Use Low Tuition?	Checked = Yes Not checked = No	Not checked = No	
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	Enrollment Status	Pell %	FSEOG %	Grant %	Perkins %	WS %	Subsidized Loan %	Other Loan %

# 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	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	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	

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## Packaging Remaining Need Dialog Box

<b>Question</b>	<b>Minimum Need</b>	<b>Maximum Need</b>	<b>Award Amount</b>
<b>Possible Answer</b>	00000 to 99999 Cannot be blank	00000 to 99999 Cannot be blank	00000 to 99999 Cannot be blank
<b>Default Answer</b>	N/A	N/A	N/A
<b>Your Answer</b>			
<b>Your Answer</b>			
<b>Your Answer</b>			

# 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	

Fund Code	Fund Priority	School Min	School Max	Min EFC	Max EFC	Remaining Need



# 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	
<b>Budget Amounts</b>			
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	
<b>User Defined Budget Amounts</b>			
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	

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## 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)

<b>Question</b>	<b>Possible Answer</b>	<b>Default Answer</b>	<b>Your Answer</b>
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 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	

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## Document Tracking (Packaging)

<b>Question</b>	<b>Possible Answer</b>	<b>Default Answer</b>	<b>Your Answer</b>
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	