January 2014

RE: EDExpress for Windows 2014-2015, Release 1.0

Dear EDExpress Users:

Federal Student Aid is pleased to announce the availability of EDExpress for Windows 2014-2015, Release 1.0. Release 1.0 is the initial EDExpress software release for the 2014-2015 award cycle and includes the Application Processing and Packaging modules, as well as Global functionality such as Security setup, Document Tracking, and User Database.

About this Cover Letter

This letter includes the following information:

- Overviews of EDExpress 2014-2015, Release 1.0 and upcoming 2014-2015 EDExpress 2014-2015 releases

- A list of 2014-2015 enhancements available in Release 1.0

- Enrollment instructions for FAA Access to CPS Online

- Release 1.0 software and user documentation download instructions

- Microsoft Windows compatibility and Section 508 compliance notices

- Contact information for technical support and additional assistance

Important Note for Packaging Users: See the note under the Packaging section later in this letter for important information regarding the Federal Pell Grant (Pell Grant) award limits in the EDExpress 2014-2015 Release 1.0 Packaging module.

EDExpress 2014-2015, Release 1.0

EDExpress for Windows 2014-2015, Release 1.0 consists of two software modules:

- Application Processing

- Packaging

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

Release 1.0 does not overwrite your EDExpress 2013-2014 database; instead, it creates a new database specific to 2014-2015 data. You can pull forward certain EDExpress 2013-2014 data elements for use in 2014-2015, including setup parameters, student demographic data, and user-defined data fields, using the Prior Year Import feature.

Upcoming EDExpress 2014-2015 Releases

EDExpress 2014-2015, Release 2.0, scheduled for posting in April 2014, will add Pell Grant functionality for 2014-2015. We are also implementing new Packaging reports in Release 2.0 that will assist you with completing part of your annual Fiscal Operations Report and Application to Participate (FISAP).

Note: While Release 2.0 will include the William D. Ford Direct Loan (Direct Loan) and Teacher Education Assistance for College and Higher Education (TEACH) Grant modules, you should **not** create or submit origination or disbursement records for either module using Release 2.0.

We are delaying the addition of the William D. Ford Direct Loan (Direct Loan) and Teacher Education Assistance for College and Higher Education (TEACH) Grant modules until EDExpress 2014-2015, Release 3.0, which will be posted in July 2014. This delay is necessary to implement new legislative enhancements.

Release 1.0 Enhancements

The following product enhancements have been incorporated into EDExpress 2014-2015, Release 1.0.

General

- **Updated Cycle References and Message Classes** – We updated software labels, help system topics, reports, and other functionality throughout EDExpress to reference the 2014-2015 cycle. Message classes with cycle indicators are also updated for 2014-2015 in File Management (**Tools**, **Setup**, **Global**, **File Management**) and in various Import and Export dialog boxes throughout EDExpress.

  Note: For more information regarding message classes used by the CPS in 2014-2015, see the Processing Codes section of the *2014-2015 EDE Technical Reference*, available from the U.S. Department of Education's Federal Student Aid Download (FSAdownload) Web site located at fsadownload.ed.gov.

- **Updated EDExpress Icon and Splash Screen Color to Match 2014-2015 FAFSA –** The EDExpress software's Windows icon and splash screen (which is displayed when you first start the software) have been color-coded blue to match the 2014-2015 Free Application for Federal Student Aid (FAFSA) form.

Application Processing

The following enhancements are available in the EDExpress 2014-2015 Application Processing module:

ISIR View, Print, File Format, and Query

- **New and Modified ISIR Fields Available** – New and modified data elements on the 2014-2015 ISIR print on the EDExpress ISIR report, appear on the ISIR Review tab and Apps Browse grid, and are available for selection in App Express File Format and Query setup.

Note: See the *2014-2015 ISIR Guide*, available on the FSAdownload Web site, for more detailed information on changes to the ISIR for 2014-2015.

- **ISIR Financial Field Lengths Expanded** – To help improve the accuracy of information provided by Title IV applicants, we expanded the length of financial fields reported on the FAFSA and provided in the ISIR. This field length expansion applies to multiple student, parent, and spouse income and asset information fields, such as Adjusted Gross Income, U.S. Income Tax Paid, and Income Earned from Work.

  As a result of increasing the length of financial fields on the FAFSA, we also needed to increase the field length of certain ISIR field values calculated by the CPS, including (but not limited to) the following:

  – The Primary, Secondary, and Signature Reject EFC fields are now each six digits long.

  – The EFC Intermediate field values of TI: Total Income, AI: Available Income, AAI: Adjusted Available Income, STI: Student's Total Income, and FTI: FISAP Total Income are now each eight digits long.

  – The student and parent versions of the worksheet A and worksheet B total amount fields are now each eight digits long.

  The ISIR fields affected by this change continue to appear on the ISIR Review tab or the FAA Information dialog box (**View**, **FAA Information**) and the List Changes dialog box (**View**, **List Changes**), are printed on the ISIR, and can be used in queries and exported in file formats.

NSLDS View and Print

- **New NSLDS Fields for Public Law 112-141** – Public Law 112-141 eliminates the subsidy on Direct Subsidized loans when a new borrower's enrollment time exceeds 150% of the published length of the longest program of study in which the borrower is enrolled. New borrowers are defined as any borrower without an outstanding loan balance on a Direct Subsidized, Direct Unsubsidized, PLUS loan (Parent PLUS and Grad PLUS), FFEL, consolidation and/or converted TEACH Grant on or after July 1, 2013. To assist COD in determining who qualifies as a new borrower, COD will interface with NSLDS to determine if the student has an outstanding federal student loan balance.

  To accommodate this change and help you identify students affected by the new regulations, we updated the 2014-2015 ISIR to add two new NSLDS data elements, the Subsidized Usage Limit Applies flag and Subsidized Loan Eligibility Used.

  For the Subsidized Usage Limit Applies flag, valid values are:

  – **Y** = Outstanding loan balances greater than 0

  – **N** = No outstanding loan balances

  – Blank

For Subsidized Loan Eligibility Used, valid values are **000.000** to **999.000**, indicating usage periods by quarters of a year.

The Subsidized Usage Limit Applies flag and the Subsidized Loan Eligibility Used appear in the NSLDS Financial Aid History section of the ISIR (**View**, **NSLDS**) and are printed on the NSLDS report.

In addition, we added a new NSLDS Postscreening Reason Code of **25** to identify students with a change in the Subsidized Usage Limit Applies flag as a result of postscreening. The NSLDS Postscreening Reason Code of **25** appears in the NSLDS Financial Aid History section of the ISIR (**View**, **NSLDS**) and is printed on the NSLDS report.

- **Additional Updated NSLDS Field Values Available** – Updated NSLDS data values are included in the ISIR record, can be viewed in EDExpress from a student's record (**View**, **NSLDS**), and can be printed on the NSLDS report (**File**, **Print**, **App Express**, **NSLDS**).

  Note: See the *2014-2015 Summary of Changes for the Application Processing System* guide, available on the FSAdownload Web site, for more detailed information on changes to NSLDS information for 2014-2015.

Packaging

While no major changes have been made to the EDExpress Packaging module for 2014-2015, note the following considerations when using Release 1.0:

Federal Pell Grant Award Limits in Release 1.0 Packaging

At this time, the U.S. Department of Education's (ED's) Fiscal Year 2014 Appropriation has not been approved. Therefore, the Federal Pell Grant Payment and Disbursement Schedule used by the Release 1.0 Packaging module is based on the 2013-2014 Pell Grant payment and disbursement schedules in Dear Colleague Letter GEN-13-06, posted on January 30, 2013 to the Information for Financial Aid Professionals (IFAP) Web site.

After ED's Fiscal Year 2014 Appropriation is finalized, we will update the Pell Grant Payment Schedule, if necessary, through a future release of EDExpress. If you use the EDExpress Packaging module to award Pell Grants, you may want to wait until it is known if the Pell Payment Schedule changes.

Discontinuation of Subsidized Loan Eligibility for Graduate/Professional Students

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

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

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

Enrollment for FAA Access to CPS Online

To ensure your school can take full advantage of the EDExpress 2014-2015 interface with the FAA Access to CPS Online Web site, the Primary Destination Point Administrator (DPA) of the TG number used to send and receive FAFSA and ISIR correction data should verify your enrollment status.

- If your school is enrolled for 2013-2014, your enrollment status rolls over to 2014-2015.

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

- If your school is not enrolled, your school's Primary DPA can complete the enrollment for FAA Access to CPS Online site services for your school, including access to R2T4 on the Web and the ISIR Analysis Tool, through the Student Aid Internet Gateway (SAIG) Enrollment Web site, located at [fsawebenroll.ed.gov](#).

- An SAIG-FAA User Statement must be printed by the Primary DPA and signed by new users of the FAA Access to CPS Online, R2T4 on the Web, or ISIR Analysis Tool Web sites. While you do not mail SAIG-FAA User Statements to Federal Student Aid's Participation Management system, you must retain signed copies at your school.

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

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

Note: To keep from having to provide your FSA User ID and password each time you open a student record in EDExpress when making changes on the FAA Access to CPS Online Web site, open a Web browser, such as Internet Explorer, or start an instant messaging program and leave it running in the background. As long you have at least one Web browser open or an instant messenger program running, the session remains active and you are not required to re-authenticate. Note, however, that session timeout rules still apply.

How to Get EDExpress and Documentation

You can download Release 1.0 and related user documentation from the FSAdownload Web site.

EDExpress Software

Instructions for downloading EDExpress are located in the "Downloading Documentation and Software from the FSAdownload Web Site" section of the *2014-2015 Installation Guide for EDExpress for Windows*.

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

User Documentation

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

- EDExpress Installation Guide
- EDExpress Release 1.0 Desk Reference
- Technical References

The 2014-2015 versions of the *Electronic Data Exchange (EDE) Technical Reference* and the *EDExpress Packaging Technical Reference* provide technical guidance and record layouts for schools or other organizations that need to interface local software or mainframe systems with EDExpress 2014-2015. The *EDExpress Packaging Technical Reference* also contains worksheets you can use to help plan and implement your Packaging module setup in EDExpress 2014-2015.

Compatibility and Compliance

Microsoft Windows 7, Windows Vista, and Windows 8 Information

While we do not officially support the Microsoft Windows 7 or the Windows Vista operating systems for use with our EDESuite PC products (including EDExpress, DL Tools, and SSCR), we have performed compatibility testing with both operating systems and resolved the majority of the issues discovered during testing.

- In 2012, we tested Microsoft Windows 7 as an operating system during the development of the 2012-2013 versions of our EDESuite PC software. Our test results indicated that schools should be able to proceed with use of Windows 7 without encountering any major issues, largely due to enhancements we implemented previously for the Windows Vista operating system. For more information on our Windows 7 testing, see the August 8, 2012 electronic announcement posted to the IFAP Web site.

- In 2008, we tested Microsoft Windows Vista as an operating system for our EDESuite PC products. We communicated our original Vista testing results, issues we discovered, and steps schools needed to take in order to run EDExpress on Vista operating systems in the September 18, 2008 electronic announcement posted on the IFAP Web site. The vast majority of Windows Vista issues discussed in the announcement have been resolved, most recently in our 2012-2013 PC software releases.

Note: Federal Student Aid has not yet tested the Microsoft Corporation's Windows 8 as an operating system for its PC software products, including the EDExpress and DL Tools software. We do not currently have a projected date for Windows 8 compatibility testing. Additional information will be provided as it becomes available.

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 or directly read the contents of software grid cells. To accommodate these restrictions, 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.

- All software grids display "floating" text descriptions of the contents of grid cells when cells are selected. The text appears one cell above (or below, if the first cell is selected) the selected cell. The text lists Row number, Column title, and (if applicable) the current Value.

For more information on EDExpress functionality related to Section 508, see the help topic "Enable 508 Grid Functionality?" in EDExpress 2014-2015.

Getting Help

If You Have Technical Support Questions

If you have questions regarding EDExpress installation or functionality, have trouble accessing the FSAdownload Web site, 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** (**TDD/TTY 800/511-5806**). You can also send e-mail inquiries, comments, or suggestions to CPSSAIG@ed.gov.

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