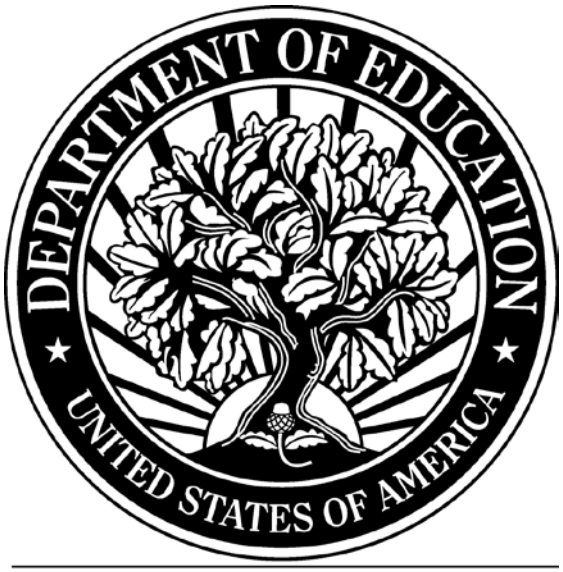
2014-2015 Desk Reference for

EDExpress for Windows Release 1.0

Setup

Application Processing

Packaging



FEDERAL STUDENT AID

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Introduction to EDExpress for Windows

Using EDExpress for Windows 2014-2015, Release 1.0

With the App Express module, you can import, review, and print Institutional Student Information Records (ISIRs) sent to you by the Central Processing System (CPS). ISIRs are generated when:

- Students file the Free Application for Federal Student Aid (FAFSA)
- Students correct the Student Aid Report (SAR)
- You complete FAFSAs for students using FAA Access to CPS Online
- You make corrections to student records using FAA Access to CPS Online
- The CPS creates new ISIRs based on changes to student eligibility ("pushed ISIRs")

The FAFSA and Student Inquiry tabs in the App Express module are linked directly to the FAA Access to CPS Online Web site. FAFSAs and ISIR correction data are submitted through the Web interface directly to the CPS.

Installation of the Packaging module is optional. With the Packaging module, you can track, award, and manage federal student aid funds.

The EDExpress database is password-protected to prevent unauthorized people from opening it in Microsoft Access and viewing information protected by the Privacy Act of 1974, as amended. If you need to open the database in Microsoft Access, see the topic "Database Password" in Help. However, Federal Student Aid strongly discourages users from viewing or manipulating any EDESuite software database using Microsoft Access. Making changes to the software database (using any version of Microsoft Access) can potentially cause damage to the database structure and proper software functionality, and limit CPS/SAIG Technical Support's ability to resolve problems you may encounter as a result.

For compliance with Section 508 of the Rehabilitation Act, all required fields highlighted in yellow display an "-R" at the end of the field label. Fields that turn blue when the value is changed display a "-C" at the end of the field label when the change is saved.

For compliance with Section 508 of the Rehabilitation Act, grids display floating text descriptions of the contents of grid cells. The text appears one cell above (or one cell below, for cells in the first line of a grid) the selected cell. The text lists row number, column title, and (if applicable) the current value. Clicking once in a cell, or using the Tab key or arrow keys to move to a cell, displays the text. Clicking a second time hides the text.

The first time you log in, the default user ID and password are SYSADMIN. The system then prompts you to change the default password by entering a new password and verifying it. Floating text is always enabled for the SYSADMIN user ID and always appears in the Startup Information dialog box. To disable the floating text, select **Tools**, **Setup**, **Security Users** from the menu bar and create a new user ID and password. Exit the software, and then log in again with your new user ID and password.

For all users other than SYSADMIN, floating text is disabled by default. To enable it, select the **Enable 508 Grid Functionality?** checkbox in the Security Users dialog box.

Purpose of this Desk Reference

This desk reference provides basic instructions for using Global functions and the App Express and Packaging modules of EDExpress. For additional information, see Help within EDExpress.

Setting Up EDExpress

Logging In for the First Time

When you start EDExpress for the first time, the Startup Information dialog box appears with an alert that your assumed school is not defined. After you have defined your assumed school code in Global Setup, this alert no longer appears. Under certain conditions, other warnings or alerts may appear.

To log in to EDExpress for the first time:

1. Select **Start**, **Programs**, **EDESuite**, **EDExpress 2014-2015** and choose **EDExpress for Windows 2014-2015**.
2. When you see the Startup Information dialog box, click **Close**.
3. Type **SYSADMIN** for the user ID. Until you create a user ID for yourself or user IDs for others in your office, SYSADMIN is the default user ID.
4. Type **SYSADMIN** for the password.
5. Type a new password in the New Password field. You must change the SYSADMIN password the first time you log in to the software. The new password becomes the password for the SYSADMIN user ID.

   Valid passwords are one to eight characters long and can contain uppercase letters (A-Z), numbers (0-9), plus (+), dash (-), backslash (/), asterisk (*), number (#), period (.), and apostrophe (‘).
6. Type the new password again in the Verify Password field.
7. Click **OK** or press **Enter** to log in to EDExpress. The Prior Year Data dialog box appears, offering you an opportunity to import your prior year setup data.

8. If you want to import Global, Application Processing, and Packaging data from your EDExpress 2013-2014 database, click **Yes** to the Import Prior Year Data? prompt.

   If you do not want to import Prior Year Data or are not sure, click **No**. You can import Prior Year Data at any time by selecting **File**, **Import**, **Global**, choosing **Prior Year User-Defined Queries, Setup, and File Formats** as the import type, clicking **OK**, and selecting the data you want to import. See "Prior Year Import" in this desk reference for more information.

Prior Year Import

When you log in to EDExpress 2014-2015 for the first time, you are prompted to import Prior Year Queries, Setup, and File Formats from the EDExpress 2013-2014 database. If you do not import prior year data when you log in for the first time, you can import it later by following the steps at the end of this section.

When you import prior year file formats, all file format fields are imported, even those that include fields for which labels have changed, as long as the fields exist in the current year's software.

The following data can be imported using Prior Year User-Defined Queries, Setup, and File Formats:

Query

- Global
- App Express
- Packaging

Global Setup

- Security Groups

  Note: Security group access rights are not transferred when you import prior year Security Groups. You must reassign access rights to imported groups in Security Groups setup. See "Defining Security" in this desk reference for more information.

- Security Users
- Document Tracking
- User-Defined Letter Text
- System
- File Management

  Note: Import and export file paths for new message classes default to C:\IAM\DATA and are not updated when you import prior year File Management setup. If you want the import and export paths for new message classes to be different than the default C:\IAM\DATA, you must change the paths in File Management setup.

- File Formats

  Note: If a file format with the same code already exists in EDExpress 2014-2015, the file format from the prior cycle is not imported.

- User Database
- FAA Access
- **New for 2014-2015!** Financial Aid Shopping Sheet Profiles

  Note: The ability to import Financial Aid Shopping Sheet Profiles as part of Prior Year Queries, Setup, and File Formats import is new for 2014-2015. We added the Financial Aid Shopping Sheet Profiles dialog box in EDExpress 2013-2014, Release 3.0.

Application Processing Setup

- System
- File Formats

  Note: If a file format with the same code already exists in EDExpress 2014-2015, the file format from the prior cycle is not imported.

Packaging Setup

- Academic Year Profiles
- Fund Maintenance
- Award Methodologies
- Budgets
- SAP Values
- System
- User-Defined Formulas
- File Formats

  Note: If a file format with the same code already exists in EDExpress 2014-2015, the file format from the prior cycle is not imported.

To import prior year data:

1. Select **File**, **Import** from the menu bar, then choose the **Global** tab.
2. Confirm that **Prior Year User-Defined Queries, Setup, and File Formats** appears as the Import Type.
3. Select **Printer**, **File**, or **Screen** as the output destination. If you want to send the report to a file, click the **File** button and type a name for the file, then click **Save**.
4. Click **OK**. The Prior Year Move dialog box appears.
5. Select the items you do not want to import by clearing the checkboxes in the Import column.

6. Select one of the following import options:
   - **Import All records for Setup Options Selected** imports all records without prompting you to select specific records.
   - **Import only Specific records for Setup Options Selected** prompts you to select the specific records you want to import for each group of records, such as Security Groups and Award Methodologies.
7. Click **OK**.

   If you chose Import All records for Setup Options Selected, the In Progress dialog box appears.

   If you chose Import only Specific records for Setup Options Selected, you must select the specific records you want to import for each group of records before the In Progress dialog box appears.
8. Click **OK** to close the In Progress dialog box.
9. If you selected Printer as the output destination, click **OK** to print the Import Prior Year Queries, Setup, and File Formats report.

What Is Global?

The Global module, which is installed automatically, provides core features and functionality applicable across EDExpress and available in all of its other modules. In addition to storing student demographic records and establishing default EDExpress settings, the Global module allows you to:

- Create security groups and security users
- Import prior year user-defined queries, setup, and file management; prior year demographic data; prior year user data; user-defined data; demographic data, and ED initiated imports
- Create and view demographic data
- Export external demographic data to use in spreadsheets or with external systems
- Create notes on individual student records
- Print labels, notes, letters, lists, queries, user data, setup options, record layouts, and student summaries
- Manage import and export directories
- Create user-defined fields
- Track documents
- Set up, create, print, and export the Financial Aid Shopping Sheet for your students (see appendix)

In addition, the Global module provides two database utilities, Compact and Repair Database and Verify Database.

Global Setup

Defining Security

Creating security groups is optional. If you do not need to limit access to EDExpress, you can create user IDs and assign them to the predefined EXPRESS ADMINISTRATION security group, which has access to all EDExpress functions.

If you need to restrict access to some of the functions within EDExpress for certain users, the first step is to establish *groups* that have limited access to EDExpress. The second step is to create *user IDs* and assign them to the groups you have created to specify which functions the users can access.

You can grant or restrict access to FAA Access setup when you create security groups. Click the Global tab on the Security Groups dialog box and select or clear the checkbox in the Access column to the right of the FAA Access function under SETUP.

To create a security group:

1. Select **Tools**, **Setup** from the menu bar, then choose **Global**, **Security Groups**.
2. Click **Add**.
3. Type the name of the group you are defining.
4. Select the **Browse Only (Tabs)?** checkbox if you want the group to have read-only access to the tabs on individual student records. Access to other functions, such as importing, exporting, and using Multiple Entry, can be limited by clearing the Access checkboxes.
5. (Optional) In the Password Timeout field, type the number of days a group member's password is valid. If you do not want the group members' passwords to expire, leave the value at 0.
6. Click the tab for the module for which you are defining security. The security options change depending on the tab you select.
7. Select the checkboxes in the Access column to enable or disable the functions to which the group will have access. If the function's checkbox is selected, the function is enabled. For example, if you want users in a group to have access to Global setup options, click the **Global** tab, scroll down to the checkbox for Setup in the Tools group, and select the checkbox to enable access.
8. Click **Save** to add the group to the database.
9. (Optional) Repeat steps 2 through 8 to add more groups.
10. Click **OK** to return to the EDExpress main screen.

To create users:

1. Select **Tools**, **Setup** from the menu bar, then choose **Global**, **Security Users**.
2. Click **Add** (below the record count box). If this is your first record to add after installing EDExpress, skip this step and go to step 3.
3. Type a user ID in the User ID field and press **Tab**.
4. Click the **down** arrow to view a list of available security groups and select a group name. The security settings for this group are applied to the user ID you are creating.
5. (Optional) Select the **Export to EDconnect?** checkbox to export records to the EDconnect transmission queue automatically so they can be sent to the Common Origination and Disbursement (COD) System for processing.
6. (Optional) Select the **Automatically Transmit?** checkbox if you want EDExpress to start EDconnect and automatically transmit your files when you export them.
7. Press **Tab** to advance to the Password field.
8. Type the password for the user in the Password field and press **Tab**.
9. Type the password again in the Verify Password field.
10. (Optional) Select the **Enable 508 Grid Functionality?** checkbox to display floating text descriptions of the contents of grid cells.
11. Click **Save** to add the user to the database.
12. (Optional) Repeat steps 2 through 11 to add more user IDs.
13. Click **OK** to return to the EDExpress main screen.

Helpful Hint!

- You can also change passwords in the Security Users dialog box. See Help for instructions on changing passwords.

School Setup

To define an assumed school:

1. Select **Tools**, **Setup** from the menu bar, then choose **Global**, **School**.
2. If you receive the message "No Assumed School," click **OK**.
3. Click **Retrieve...** (above the **Help** button in the lower portion of the dialog box) to view the school list. Right-click any column heading to view a menu of sorting functions to help you locate your school. You can also use the **scroll bars** to view the list.
4. Click your school's name and click **OK**. If the Federal School Code that now appears in the School Code field is the one you want for your assumed school, select the **Assumed School** checkbox. Verify that the information about your school is correct, and make changes if necessary.

5. If you will be processing applications, confirm that the **App Processing Participant** checkbox is selected.
6. Click **OK** to continue.
7. Click **Yes** to save.

Important Note

- If you are a Direct Loan school and have both an application processing school code and a DL code, be sure to use your application processing school code as the assumed school.

Global System Setup

In addition to setting up Global System options for all users, you can define certain system options for individual users. See "To set up Global System values for an individual user ID" immediately following "To set up Global System options."

To set up Global System options:

1. Select **Tools**, **Setup** from the menu bar, then choose **Global**, **System**.
2. Select the **Allow notepad entries to be edited?** checkbox if you want EDExpress users to create and edit Notes entries. If you clear this checkbox, users will have read-only access to Notes entries.
3. Click the **down** arrow and select the default system (Global, App Express, or Packaging) to display when you are printing, importing, exporting, deleting, creating queries, creating file formats, and setting up security groups.
4. Type the number of days that you want to elapse before EDExpress automatically reprints another document tracking letter for document codes that have not been marked as received when you print letters again.
5. Type the number of times you want to reprint document tracking letters for each student.
6. Type the number of document tracking letters you want to print for each student each time you print these letters.
7. Select the **Return to Dialog** checkbox if you want to return to the Print, Import, or Export dialog boxes after printing a report, importing data, or exporting data.
8. Click the **down** arrow and select **Single** if you usually print a single record at a time, or select **Multiple** if you usually print multiple records at a time.

   You can change this setting in the Print dialog box for a specific print job at any time, but your default setting remains the same until you change it in Global System setup.
9. Click the **down** arrow and select **Printer**, **File**, **Screen**, or **E-mail** as the default report file destination.

   You can change this setting in the Print dialog box for a specific print job at any time, but your default setting remains the same until you change it in Global System setup.

10. Click the **down** arrow and select **E-mail Address 1** if you want all correspondence that can be printed to e-mail, such as award letters and document tracking letters, to be sent to the e-mail address in the E-mail Address 1 field on the Demo tab. Select **E-mail Address 2** if you want e-mailed reports to be sent to the e-mail address in the E-mail Address 2 field on the Demo tab.

    You can change this setting in the Print dialog box for a specific print job at any time, but your default setting remains the same until you change it in Global System setup.

11. Click the **down** arrow and select **Permanent** if you want all correspondence to be addressed to a student's permanent home address. Select **Local** if you want all correspondence to be addressed to a student's local address.

    You can change this setting in the Print dialog box for a specific print job at any time, but your default setting remains the same until you change it in Global System setup.

12. Click **OK** to continue.
13. Click **Yes** to save.

To set up Global System values for an individual user ID:

Note: Options that cannot be selected for individual users are disabled.

1. Select **Tools**, **Setup** from the menu bar, then choose **Global**, **System**.
2. Click the **Add** button in the lower portion of the dialog box.
3. Click the **ellipsis (…)** button to the right of the User ID field in the upper portion of the dialog box and select a user ID from the list of users. Click **OK**.
4. Click the **down** arrow and select the default system (Global, App Express, or Packaging) to display when the user prints, imports, exports, deletes, creates queries, and creates file formats.
5. Select the **Return to Dialog** checkbox if the user wants to return to the Print, Import, or Export dialog boxes after printing a report, importing data, or exporting data.
6. Click the **down** arrow and select **Single** if the user usually prints a single record at a time, or select **Multiple** if the user usually prints multiple records at a time.

    You can change this setting in the Print dialog box for a specific print job at any time, but the default setting remains the same until you change it in Global System setup.

7. Click the **down** arrow and select **Printer**, **File**, **Screen**, or **E-mail** as the default report file destination.

    You can change this setting in the Print dialog box for a specific print job at any time, but the default setting remains the same until you change it in Global System setup.

8. Click the **down** arrow and select **E-mail Address 1** if the user wants all correspondence that can be printed to e-mail, such as award letters and document tracking letters, to be sent to the e-mail address in the E-mail Address 1 field on the Demo tab. Select **E-mail Address 2** if the user wants e-mailed reports to be sent to the e-mail address in the E-mail Address 2 field on the Demo tab.

   You can change this setting in the Print dialog box for a specific print job at any time, but the default setting remains the same until you change it in Global System setup.

9. Click the **down** arrow and select **Permanent** if the user wants all correspondence to be addressed to a student's permanent home address. Select **Local** if the user wants all correspondence to be addressed to a student's local address.

   You can change this setting in the Print dialog box for a specific print job at any time, but the default setting remains the same until you change it in Global System setup.

10. Click **OK** to continue.

11. Click **Yes** to save.

FAA Access Setup

If you are the destination point administrator (DPA) of the TG number used for CPS processing, or if the DPA has enrolled you as a user for FAA Access to CPS Online, you can enter your EDExpress FAA Access authentication information (TG number, Federal School Code, and Application Save/Restore Password) in the FAA Access setup dialog box. This information will be automatically filled on the FAA Access Automation Information dialog box when you use the FAA Access interface from the menu bar, the FAFSA tab, or the Student Inquiry tab.

EDExpress uses ED's authentication process for logging into FAA Access to CPS Online through EDExpress. You must provide your FSA User ID and password each time you connect to FAA Access to CPS Online through EDExpress. If you do not already have an FSA User ID, contact CPS/SAIG Technical Support at **800/330-5947** or by e-mail at CPSSAIG@ed.gov for help obtaining one.

The same FAA Access authentication information you enter in Setup will log you in to the Return of Title IV Funds on the Web and ISIR Analysis Tool Web sites. To access the sites, select **View**, **FAA Access to CPS Online** from the menu bar, then select **Return of Title IV Funds on the Web** or **ISIR Analysis Tool**.

Note: Although access to the Return of Title IV Funds on the Web and ISIR Analysis Tool Web sites is part of FAA Access to CPS Online enrollment, it is not automatically granted to people who are enrolled for FAA Access to CPS Online and must be specifically requested by your DPA on the Student Aid Internet Gateway (SAIG) Enrollment Web site located at fsawebenroll.ed.gov. Contact your DPA if you are unsure whether or not you have been enrolled for the services.

1. Select **Tools**, **Setup** from the menu bar, then choose **Global**, **FAA Access**.

2. Type the TG number you use for FAA Access to CPS Online in the TG # field.

3. Type your Federal School Code in the School Code field. Or, click the **ellipsis (…)** button to select your school code from the list of codes.
4. (Optional) Type a password for saving and restoring applications and corrections in the Application Save/Restore Password field.

   Note: The Application Save/Restore Password is the password you use to access any incomplete FAFSAs you save to FAA Access to CPS Online. The password must have at least four characters but not more than eight. Valid values are uppercase letters (A-Z), lowercase letters (a-z), and numbers (0-9). If you do not enter a password in Setup, you must enter a password in the FAA Access authentication information dialog box to save an unfinished FAFSA and use the password later to restore the FAFSA so you can continue working on it. You cannot restore a FAFSA that you have not saved. An incomplete FAFSA is saved for 45 days after you last accessed it.
5. Click **OK** to continue.
6. Click **Yes** to save.

Important Notes

- FAA Access setup is disabled for the SYSADMIN user ID, so be sure to log in with a user ID other than SYSADMIN if you want to set up FAA Access for a specific user. Although you can use FAA Access to CPS Online when logged in with SYSADMIN, EDExpress does not store FAA Access user information for the SYSADMIN user ID.
- You can set up FAA Access only for the user ID with which you logged in, so be sure to log in with your own user ID before setting up FAA Access.

File Management

Use File Management to tell EDExpress where to look for files you want to import and where to put files you export. For example, if you use EDconnect to send and receive your files, the Export and Import directories in EDExpress should match the Send and Receive directories in EDconnect.

EDExpress automatically backs up your files rather than prompting you to back them up when 1,000 files of the same message class already exist in the import or export directory. If EDExpress determines that 1,000 files of the same message class already exist, the software creates a backup subdirectory called “BACKUP” in your existing data directory and automatically moves the files into it. This prevents previously imported or exported files from being overwritten when you import or export new files.

Follow the steps below for the Export and Import tabs in the File Management dialog box.

To set paths for import and export files:

1. Select **Tools**, **Setup** from the menu bar, then choose **Global**.
2. Click **File Management**.

3. Click the **Default Export Directory** or **Default Import Directory** tab. This dialog box enables you to change the directory location of your export or import files.
4. Click the **Default Export Directory** or **Default Import Directory** button to locate and select a different directory for all export or import files.
5. Click the **ellipsis (…)** button to the right of the File Path column to locate and select different directories for individual message classes.
6. Click **OK**.

Document Tracking Setup

To satisfy documentation requirements and meet school information needs, applicants must provide documents to the financial aid administrator to complete the application process. These documents can include tax returns for verification or a school aid application. EDExpress can track the request and receipt of these required documents. You can define as many tracking documents as may be required of your applicants. You can also mark each document as:

- **Automatic Request?** Use this option if you want EDExpress to assign this document automatically during the Add Documents process. EDExpress assigns documents according to the criteria you have specified. If criteria or comment codes are attached, EDExpress adds the document only to the students who meet the criteria.
- **Required to Package?** If you select this option, the document must be recorded as received before the student's aid can be packaged. If the record is already packaged, you cannot add a document that is required for packaging.
- **Required for Verification?** Your school requires this document for verification. Use this option if you want the document assigned to students selected for verification during the Add Documents process. EDExpress adds the document only when the Verification Status Code field on the demographic record is not equal to **N**. If you enable this checkbox, using the Automatic Request option is unnecessary, because EDExpress requests this document automatically from any student selected for verification.

To set up Document Tracking:

1. Select **Tools**, **Setup** from the menu bar, then choose **Global**.
2. Click **Document Tracking**.
3. Type a **Code** and a **Description** for the document tracking record.
4. Click **OK**.

Important Note

- To add documents to the records in your database, select **Process**, **Add Documents** from the menu bar. EDExpress automatically assigns the documents according to the criteria you established for each document when you set up Document Tracking.

ED Initiated Imports Setup

ED reserves 25 message classes each award year, such as ED2514OP, to deliver additional information to you through the SAIG.

When you receive a file in one of these message classes, follow the steps below to define the message class. EDExpress adds the report name to the Import Type list in the Global tab of the Import dialog box.

To set up ED-Initiated Imports:

1. Select **Tools**, **Setup**, **Global** from the menu bar.
2. Click **ED Initiated Imports**.
3. Click the **Message Class** field.
4. Click the **down** arrow and select the message class you are defining.
5. Type the report name provided by ED.
6. (Optional) Press **Enter** or click **Add** to add another import.
7. Click **OK**, then **Yes** to return to the EDExpress main window when you are finished defining message classes.

Set Up a User Database

EDExpress enables you to add your own fields to the database. These fields appear on the student's record and can be used in developing queries. You can create up to 200 user-defined fields in your database.

Note: To change a user-defined field, you must delete it and recreate it. You cannot modify user-defined fields.

You can fill user-defined data fields manually by opening a student's record, selecting the User Data tab, and entering the data, or automatically by using Multiple Entry. You can also use a Global external import file to add user-defined data fields.

To set up a user-defined database:

1. Select **Tools**, **Setup** from the menu bar, then choose **Global**, **User Database**.
2. Click **OK**.

3. Enter the following values for each field you want to add to your database:

Parameter	Description
Field	The name of the field. You can use up to 20 characters.
Type	The type of data used in the field. Click the **down** arrow to display a list of types.
Length	The length of the data: **Date: 8** **Numeric: 1-11** **Text: 1-40** **Yes or No: 1**
Description	A description of the field. You can use up to 50 characters.

4. Press **Enter** or click **Add** to add additional fields.
5. When you are finished adding fields, click **OK** to continue.
6. Click **Yes** to save.

Create User-Defined User Letter Text

EDExpress enables you to create user-defined text for letters you routinely send to students. You can create as many letters as you need. Letters are formatted so that when the letter is folded, the student's address appears in the window of a #10 window envelope.

To create User-Defined User Letter Text:

1. Select **Tools**, **Setup** from the menu bar, then choose **Global**.
2. Choose **User-Defined User Letter Text** to create your text.
3. Enter your text (up to 42 lines) and a title. You can associate the letter with a specific module.
4. Click **OK** to continue.
5. Click **Yes** to save.

Create User-Defined Award Letter Text

EDExpress enables you to create text for award letters. You can create as many letters as you need. Letters are formatted so that when the letter is folded, the student's address appears in the window of a #10 window envelope.

To create User-Defined Award Letter Text:

1. Select **Tools**, **Setup** from the menu bar, then choose **Global**.
2. Choose **User-Defined Award Letter Text**.

3. Enter your text (up to 12 lines) and choose whether or not to include a greeting with the student's name. If you include a greeting, we suggest you allow an extra space between the greeting and the text.
4. Click **OK** to continue.
5. Click **Yes** to save.

Create User-Defined Document Tracking Letter Text

EDExpress enables you to create text for document tracking letters. You can create as many letters as you need. Letters are formatted so that when the letter is folded, the student's address appears in the window of a #10 window envelope.

To create User-Defined Document Tracking Letter Text:

1. Select **Tools**, **Setup** from the menu bar, then choose **Global**.
2. Choose **User-Defined Doc Tracking Letter Text**.
3. Enter your text (up to 14 lines) and choose whether or not to include a greeting with the student's name. You can also choose to modify the preset text in text blocks 2 and 3.
4. Click **OK** to continue.
5. Click **Yes** to save.

What Is App Express?

The App Express module enables you to create, correct, review, print, export, and import student financial aid records:

- Enter FAFSAs by selecting the FAFSA tab, which takes you to FAA Access to CPS Online where you can enter initial applications for students.
- Correct student records by selecting the Student Inquiry tab, which takes you to FAA Access to CPS Online where you can enter corrections to specific transactions.
- Import ISIRs into App Express, where you can compare data, review and print ISIR data, and generate reports.
- Review ISIRs on the ISIR Review tab, where you can view students' ISIR data, print students' active transactions, or compare the data on two transactions for a particular student.
- Use the Print dialog box to print a variety of lists, reports, and records from the App Express module, including ISIRs, NSLDS data, List–Processed ISIRs, RL–User Defined Format, and Student Summary.
- Export student data to an ASCII file for use in spreadsheets or with external systems.

After you have imported ISIRs into App Express, you can import the accepted ISIRs into the TEACH Grant, Direct Loan and Pell modules to use for creating originations and disbursements and into the Packaging module to use for creating student aid packages.

You can open a student's record directly from the EDExpress toolbar by:

- Typing the original or current Social Security Number and clicking Open, or
- Selecting the student's original SSN or current SSN by clicking the ellipsis (...) button and clicking OK, then clicking Open, or
- Selecting the ISIR button to pick a student's ISIR from a list and clicking OK, then clicking Open.

You can also select **File**, **Open** from the menu bar or press **Ctrl-O** to initiate opening a record. Either action places the cursor in the Original SSN field in the toolbar.

If you have a student's record open, you can open another record by entering or selecting the SSN or ISIR from the toolbar. The first record closes automatically, prompting you to save changes. The next student's record opens to the same module and tab as the previous record.

Important Notes

- **New for 2014-2015!** 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.

- **New for 2014-2015!** We added a Student IRS Display Flag and a Parent IRS Display Flag to the 2014-2015 ISIR. The flags provide you with the reason a student or parent was not eligible to use the IRS Data Retrieval Tool (DRT) on FAFSA on the Web. You can use these fields in combination with the Student IRS Request Flag and the Parent IRS Request Flag to determine the reason a student and/or parent did not use or was not eligible to use the IRS DRT.

  Valid values for the Student IRS Display Flag are:

  - **A** = Dependent student skipped the income and asset questions–IRS DRT was not displayed
  - **B** = IRS DRT was displayed to student
  - **C** = Tax return status not equal to "Already completed"–IRS DRT was not displayed
  - **D** = Marital status date greater than or equal to January 2014–IRS DRT was not displayed
  - **E** = First three digits of SSN are 666–IRS DRT was not displayed
  - **H** = Student amended his/her tax return–IRS DRT was not displayed
  - **J** = Student filed a Puerto Rican or Foreign tax return–IRS DRT was not displayed
  - **K** = Student is married and filing status is Married Filed Separate Return–IRS DRT was not displayed
  - **L** = Student is married and filing status is Head of Household–IRS DRT was not displayed
  - **M** = Conflict between the student's marital status and filing status–IRS DRT was not displayed
  - Blank = IRS DRT not available

Valid values for the Parent IRS Display Flag are:

- **A** (if student is dependent) = Dependent student has special circumstances–IRS DRT was not displayed
- **A** (if student is independent) = Independent student skipped the parent questions–IRS DRT was not displayed
- **B** = IRS DRT was displayed to parent
- **C** = Tax return status not equal to "Already completed"–IRS DRT was not displayed
- **D** = Marital status date greater than or equal to January 2014–IRS DRT was not displayed
- **E** = First three digits of SSN are 666–IRS DRT was not displayed
- **F** = Non-married parent or both married parents entered all zeroes in SSN–IRS DRT was not displayed
- **G** = Neither married parent entered a valid SSN–IRS DRT was not displayed
- **H** = Parent amended his/her tax return–IRS DRT was not displayed
- **J** = Parent filed a Puerto Rican or Foreign tax return–IRS DRT was not displayed
- **K** = Parents are married and filing status is Married Filed Separate Return–IRS DRT was not displayed
- **L** = Parents are married and filing status is Head of Household–IRS DRT was not displayed
- **M** = Conflict between the parents' marital status and filing status–IRS DRT was not displayed
- **N** = Parents' marital status is "Unmarried and both parents living together"–IRS DRT was not displayed
- Blank = IRS DRT not available

The flags are printed on the ISIR, appear in the ISIR Review tab, and in the FAA Information dialog box (**View**, **FAA Information** while in the ISIR Review tab). They can be exported in file formats and used in queries.

- **New for 2014-2015!** We added a Student's Tax Return Filing Status flag and Parents' Tax Return Filing Status flag to the 2014-2015 ISIR. The flags indicate the tax return filing status transferred from the IRS using the IRS Data Retrieval Tool in FAFSA in the Web. This enhancement helps to identify instances in which the reported FAFSA marital status is inconsistent with the IRS tax return filing status when students/parents use the IRS Data Retrieval Tool.

Valid values for both Student's Tax Return Filing Status and Parents' Tax Return Filing Status flags are:

- **1** = Single
- **2** = Married–filed joint return
- **3** = Married–filed separate return
- **4** = Head of household
- **5** = Qualifying widow(er)
- **6** = Don't know
- Blank

The Student's Tax Return Filing Status flag and Parents' Tax Return Filing Status flag appear on the ISIR Review tab in the List Changes dialog box (**View**, **List Changes**). They are printed on the ISIR and can be used in queries and exported in file formats.

- **New for 2014-2015!** To assist in gathering accurate data, we added a new response option, "Unmarried and both parents living together," to the Parents' Marital Status question and changed the existing response of "Single" to "Never married." The responses are now:
  - Married/remarried
  - Never married
  - Divorced/separated
  - Widowed
  - Unmarried and both parents living together

  In addition, we changed the labels that included "Father's/Stepfather's" to "Parent 1" and "Mother's/Stepmother's" to "Parent 2."

  On the printed ISIR, "Father's/Stepfather's" has been changed to "Parent 1" and "Mother's/Stepmother's" has been changed to "Parent 2" for the parents' SSN, Last Name, First Initial, Date of Birth, Income Earned from Work, and Educational Level.

  In EDExpress 2014-2015, "Father's/Stepfather's" has been changed to "Parent 1" and "Mother's/Stepmother's" has been changed to "Parent 2" for the parents' SSN, Last Name, First Initial, Date of Birth, Income Earned from Work, and Highest School Completed.

  The new labels appear in the ISIR Review tab, the List Changes dialog box (**View**, **List Changes**), the Browse dialog box (**Tools**, **Browse**, **App Express**), and when exported in file formats and used in queries.

- **New for 2014-2015!** As part of FSA's ongoing effort to identify potential Title IV fraud, we are expanding our efforts for 2014-2015 by rejecting or requiring verification of CPS application/correction transactions matching new sets of criteria.
  - Records matching the criteria for rejection due to suspected fraud are assigned Reject 23 and SAR Comment Code 281, which contains additional information.
  - Records identified as matching suspect fraud patterns are selected for verification and can be verified using new identity verification criteria.
  - A system-generated transaction is processed with a data source/type code of **5L** and SAR Comment Code 283 for records no longer matching suspected fraud criteria.

  Reject 23 is displayed on the ISIR Review tab in the FAA Information dialog box (**View**, **FAA Information** while in the ISIR Review tab) and in the Browse dialog box (**Tools**, **Browse**, **App Express**). It is printed on the ISIR, and can be exported in file formats and used in queries.

  Transaction Data/Source Type Code **5L** appears in the FAA Information dialog box (**View**, **FAA Information**), in the Browse dialog box (**Tools**, **Browse**, **App Express**), is printed on the ISIR, and can be exported in file formats and used in queries.
- **New for 2014-2015!** We added Verification Tracking Flag **V6** (Household Resources Verification Group). Also, we repurposed the existing Verification Tracking Flag value of **V2** (SNAP Verification Group) to now be reserved for Federal Student Aid use only. For more information, see Dear Colleague Letter GEN-13-16, published on June 13, 2013, on the Information for Financial Aid Professionals (IFAP) Web site, located at ifap.ed.gov.

  Valid values for the Verification Tracking Flag for 2014-2015 are:
  - **V1** – Standard Verification Group
  - **V3** – Child Support Paid Verification Group
  - **V4** – Custom Verification Group
  - **V5** – Aggregate Verification Group
  - **V6** – Household Resources Verification Group
- **New for 2014-2015!** We revised the "High School or Equivalent?" ISIR field value of "GED" to "GED/State Equivalent Test" to enable students to report they passed a test developed by their state that is considered the equivalent of passing the GED or receiving a high school diploma. In EDExpress 2014-2015, the value of "GED/State Equivalent Test" is abbreviated to "GED/State Test" due to character-length limitations on the ISIR report.

- **New for 2014-2015!** 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.

- On June 25, 2011, the Social Security Administration (SSA) implemented new guidelines for assigning Social Security Numbers (SSNs) that included assigning SSNs in previously unused ranges. As a result of the SSA change, the Central Processing System (CPS) and other Federal Student Aid Systems and products, including the EDExpress interface with the FAA Access to CPS Online Web site, use "666" as the first three digits of pseudo-SSNs for all Pacific Islander FAFSAs. This ensures Pacific Islander applicants are not assigned a pseudo-SSN that could potentially match a newly assigned, valid SSN of a different student.

  For a new student who is a resident of the Pacific Islands (State of Legal Residence is FM, MH, or PW) and does not have an SSN, enter **666** in the first three positions of the field on the New Student dialog box. Leave the remaining six positions of the field blank. EDExpress fills in these fields on each record using the sequence 220001, 220002, 220003, etc.

For returning Pacific Islander students, use the same 666 pseudo-SSNs for your students that was used for prior cycles. This will help the Common Origination and Disbursement (COD) System correctly calculate each student's cumulative Federal Pell Grant Lifetime Eligibility Used (LEU). For more information, see the November 20, 2013 electronic announcement posted to the IFAP Web site.

- Two data elements related to the Iraq and Afghanistan Service Grant—the Iraq and Afghanistan Service Grant Overpayment flag and the Iraq and Afghanistan Service Grant Contact type—print on ISIR and NSLDS reports and are displayed in the NSLDS information section dialog box (**View**, **NSLDS**).
- Applicants' FAFSAs are compared against the Department of Defense (DOD) database to determine if a parent was killed while serving in Iraq or Afghanistan after September 11, 2001. Applicants who match the criteria and were under the age of 24 at the time of death are eligible for the maximum Pell Grant award. The DOD Match Flag **Y** and a Date of Death field are returned on the ISIR.

  Each time the DOD updates its database, new ISIRs are generated for applications that meet the criteria. The ISIRs are returned in the system-generated message class IGSG13OP and can be identified by the Transaction Data Source/Type Code of **5X**.

  The DOD Match Flag and Transaction Data Source/Type Code appear on the ISIR Review tab, the List Changes dialog box (**View**, **List Changes**), print on the ISIR, and can be used in queries and exported in file formats. The Date of Death field can be viewed in the FAA Information dialog box (**View**, **FAA Information**) only.
- A dependent student with special circumstances can complete and submit an application without providing parental data. Under these conditions, the Special Circumstances Flag is set and the application is processed without an EFC. The values for the flag are:
  - **1** – Dependent record submitted without parental data
  - **2** – Correction made to parental data
  - **3** – Unaccompanied Homeless Individual
  - **4** – Dependent record for Unsubsidized Loans only
  - Blank – Flag not set

  Special Circumstances Flag **1** indicates the applicant submitted an application without parental data but does not fall into the categories for Special Circumstances Flag **3** or **4**.

  Special Circumstances Flag **2** indicates the applicant previously had a Special Circumstances Flag value of **1**, **3**, or **4** and has made a correction to his or her record to provide parental information.

  Special Circumstances Flag **3** indicates a homeless applicant who does not have access to parental data.

  Special Circumstances Flag **4** indicates a dependent applicant whose parents are unwilling to provide financial information and who wants an unsubsidized loan.

The Special Circumstances Flag appears in the FAA Information section of EDExpress, prints on the ISIR, and can be used in queries and exported in file formats.

- EDExpress translates the High School Completion field value on the ISIR to the corresponding Ability to Benefit Code on the Demo tab in the following circumstances:
  - High School Completion value of **1** (High School Diploma) = Ability to Benefit Code **06**
  - High School Completion value of **2** (GED/State Test) = Ability to Benefit Code **07**
  - High School Completion value of **3** (Home Schooled) = Ability to Benefit Code **04**

  If the High School Completion value is **4** (none of the above) or blank, the Ability to Benefit Code is not updated on the Demo tab as a result of the ISIR import.

App Express System Setup

To set up App Express System options that will be used when you import records:

1. Select **Tools**, **Setup** from the menu bar, then choose **App Express**, **System**.
2. Clear the **Update Demographic Data?** checkbox if you do not want EDExpress to update demographic records when you import ISIRs. EDExpress automatically updates the fields on a student's demographic record (Demo tab) when you import a higher transaction than the one currently in the EDExpress database.

   Leave the **Update Demographic Data?** checkbox selected if you want EDExpress to update the fields on the student's Demo tab when you import ISIRs. The demographic fields are updated only when a higher transaction number is imported.

   Note: Under normal circumstances, you should allow EDExpress to update demographic data.
3. Select the **Compare Demographic Data?** checkbox if you want EDExpress to print a list of changes made to demographic records during the ISIR import process as part of the Import Records Edit Report.
4. Click **OK** to continue.
5. Click **Yes** to save.

Importing and Printing ISIRs

Importing Data into EDExpress

Within three business days of entering FAFSA application data or ISIR corrections on the FAA Access to CPS Online Web site, the corresponding ISIRs are available for you to retrieve from your Student Aid Internet Gateway (SAIG) mailbox. See EDconnect Help or the SAIG Desk Reference for EDconnect at the U.S. Department of Education's Federal Student Aid Download (FSAdownload) Web site, located at fsadownload.ed.gov, for more information. You must import the data into EDExpress to view the ISIRs in EDExpress.

To import ISIRs into EDExpress:

1. Select **File**, **Import** from the menu bar, then choose **App Express**.
2. Confirm that "ISIR Data" appears in the Import Type field. If it does not, click the **down** arrow and select **ISIR Data**.
3. Click the **File** button in the Import From section of the screen and select the file you want to import.
4. Click **Open**.
5. Choose where you want to send the report: **File**, **Printer**, or **Screen**. If you choose File, click the **File** button and type a name for the file, then click **Save**.
6. Click **OK** to import the file. A progress bar appears within the In Progress dialog box.
7. Click **OK** to close the In Progress dialog box when the import is finished.

An import ID is created for a batch of records at the time you import the file. The identifier is 14 characters long and is in the format CCYYMMDDHHMMSS, the date and time at the start of the import. For example, "20140103120000" would be the import ID of a file imported on January 3, 2014 at 12:00 noon. You can use the identifier to print all the student records in an individual file. The import ID created when you import an ISIR file prints on the Import Records Edit Report.

If you made a request for ISIRs from the ISIR Datamart on FAA Access to CPS Online using a query, the query title (up to 50 characters) prints on the ISIR Import Records Edit Report when you import the file.

Important Notes

- When you import ISIRs and select the **Identify Activated Transactions?** checkbox, the EFC of the active transaction and the EFC of the incoming ISIR appear on the Import Records Edit Report *if* the transaction number on the import file is greater than or equal to the transaction number on the database *and* the EFCs are different.
- ISIR data import types are listed under one category, ISIR Data, in the Import Type box.
- When you import ISIRs and select the **Identify incoming ISIRs with existing Packaging, DL, Pell, or TEACH Grant records?** checkbox, the Import Records Edit Report displays the "HAS FLAG" for Packaging, Direct Loan, and Pell if a record exists in those modules for the student.
- When an assumption has been made on an ISIR, a notation is displayed on the ISIR Review tab alerting you to the assumption and referring you to the List Changes dialog box, where you can view the assumed value or values for the ISIR. To view these values, select **Process**, **List Changes** from the menu bar.

Printing ISIRs

You can print single or multiple ISIRs or the List–Processed ISIRs report after you have imported ISIR records into EDExpress. A printed ISIR includes all the applicant information submitted by the student and the computed results from the CPS.

To print a single ISIR:

1. Select **File**, **Print** from the menu bar, then choose **App Express**.
2. Confirm that "ISIR" appears as the Report type.
3. Select **Single** as the Report option if it is not already selected.
4. Choose where to send the report: **File**, **Printer**, or **Screen**. If you want to send the report to a file, click the **File** button and type a name for the file, then click **Open**.

   If you chose **File** as your output destination, no paper copy prints. To print a paper copy, locate the file, open it using a text editing program such as Windows Notepad, and print it.

   If you chose **Screen** as your output destination, no paper copy prints. Use the **scroll bars** to view the report and click **Close** when you are finished. To print a paper copy, click the **Print** button to print from the screen.
5. Type the student's Social Security Number, first two letters of the last name, and transaction number (01, 02, etc.) in the Trankey field, or click the **ellipsis (…)** button and select the ISIR you want to print from a list of ISIRs.
6. Select or clear the following options: **Only print records with more than six loans?**, **Print Certification/Signature Page?**, **Print FAA Comments?**, **Print SAR Comments?**, and **Print Loan Information?**
7. Click **OK**.

To print multiple ISIRs:

1. Select **File**, **Print** from the menu bar, then choose **App Express**.
2. Confirm that "ISIR" appears as the Report type.
3. Select **Multiple** as the Report option if it is not already selected.
4. Choose where to send the report: **File**, **Printer**, or **Screen**. If you choose to print to a file, click the **File** button and type a name for the file, then click **Open**.
5. You have several options for choosing which ISIRs to print:
   - Click **OK** to print all the ISIRs in the EDExpress database.
   - Click the **Selection Criteria** button, then the **Select Records** button to choose specific ISIRs to print.
   - Use an SSN file. Click the **ellipsis (…)** button in the SSN File section of the dialog box. See Help for information about creating SSN files.

- Use a query to select students. Click the **Selection Criteria** button, then click the **ellipsis (…)** button next to Query Title to select a query.
- Use the import ID to print all the students in a particular file. Type the import ID in the Import ID field or click the **ellipsis (…)** button to select the import ID from a list.

6. Click the **down** arrow in the Sort Order field and select **SSN** or **Last Name** order. If you choose Last Name, records are sorted in order of last name, first name, and then transaction number. The default option is SSN order.
7. If you have a transaction preference, click the **down** arrow under Transaction Preference? and select **Highest**, **Active**, or **All** to print the highest transaction, the active transaction, or all transactions, respectively. If no transaction is activated, the default is the highest transaction.
8. Select or clear the following options: **Only print records with more than six loans?**, **Print Certification/Signature Page?**, **Print FAA Comments?**, **Print SAR Comments?**, and **Print Loan Information?**
9. Click **OK**.

Important Note

- The e-mail address that prints on the ISIR is labeled "E-mail Address 1" on the Demo tab, but prints on the ISIR as "E-mail Address."

To print the List–Processed ISIRs report:

1. Select **File**, **Print** from the menu bar.
2. Select the **App Express** tab.
3. Click the **down** arrow in the Report box and select **List–Processed ISIRs**.
4. Click **Printer**, **File**, or **Screen** for the output destination.

   If you want to send the report to a file, click the **File** button and type a name for the file, then click **Open**.

   If you chose **File** as your output destination, no paper copy prints. To print a paper copy, locate the file, open it using a text editing program such as Windows Notepad, and print it.

   If you chose **Screen** as your output destination, no paper copy prints. Use the **scroll bars** to view the report and click **Close** when you are finished. To print a paper copy, click the **Print** button to print from the screen.
5. (Optional) Click the **down** arrow next to Sort Order to specify the order in which you want ISIR data to print.
6. (Optional) Click the **down** arrow next to Transaction Preference to specify which ISIR transactions you want included on the report.

7. (Optional) Click the **ellipsis (…)** button to the right of Import ID to select the import ID associated with the ISIRs you want included on the report.
8. (Optional) Select or deselect other options as appropriate.
9. (Optional) Click the **Selection Criteria** button if you want to use specific selection criteria to narrow the number of records you want included on the report.
10. Click **OK** to send the list to the output destination you chose.

Exporting External Demographic and ISIR Data

External Demographic Data Export

EDExpress enables you to export demographic data to an external system. You can create Global file formats that include any of the fields on a student's demographic record, including the student's e-mail addresses. File formats are limited to a maximum of 255 fields.

To export external demographic data:

1. Close any records that are open.
2. Select **File**, **Export** from the menu bar, then choose **Global**.
3. Confirm that "External Demographic Data" appears in the Export Type field. The default path and file name appear in the Export To field.
4. If you want to export using a different file name, click the **File** button and type a name for the file, then click **Save**.
5. Select the delimiter type.
6. Type the format code in the Format Code field, or click the **ellipsis (…)** button to select from a list of format codes.
7. (Optional) Click **Selection Criteria** to narrow the group of records you want to export. When you are finished, click **OK**.
8. Click **OK** to export the data. EDExpress exports the file to the directory shown in the Export To field. An In Progress dialog box appears.
9. Click **OK** to close the In Progress dialog box when the export is finished.

Important Note

- To use the external export feature in Global, you must establish a file format. See the topic "File Formats" in the EDExpress Help for more information.

External ISIR Export

EDExpress enables you to export ISIR data to an external system.

To export external ISIR data:

1. Close any records that are open.
2. Select **File**, **Export** from the menu bar, then choose **App Express**.
3. Confirm that "External ISIR" appears in the Export Type field. The default path and file name appear in the Export To field.
4. If you want to export using a different file name, click the **File** button and type a name for the file, then click **Save**.
5. Select the transaction preference.
6. Select the delimiter type.
7. Type the format code in the Format Code field, or click the **ellipsis (…)** button to select from a list of format codes.
8. (Optional) Click **Selection Criteria** to narrow the group of records you want to export. When you are finished, click **OK**.
9. Click **OK** to export the data. EDExpress exports the file to the directory shown in the Export To field. An In Progress dialog box appears.
10. Click **OK** to close the In Progress dialog box when the export is finished.

Important Note

- To use the external export feature in App Express, you must establish a file format. See the topic "File Formats" in the EDExpress Help for more information.

Introduction to Packaging

What Is Packaging?

Financial aid packaging is the process of tracking, awarding, and managing financial aid funds or resources. EDExpress Packaging uses the term award methodology. An award methodology is a formula that determines how financial aid funds are allocated to your students. Within EDExpress, the Package process automatically applies your school's award methodologies that you set up in the software to one or all of your students. Your students are packaged or awarded aid from the sources and amounts specified by your award methodologies and the criteria you attach to them.

This section of the desk reference guides you through the packaging process from setup through exporting your data. We recommend that you review the checklist provided at the beginning of the Packaging Setup section.

For compliance with Section 508 of the Rehabilitation Act, all required fields highlighted in yellow display an "-R" at the end of the field label. Fields that turn blue when the value is changed display a "-C" at the end of the field label when the change is saved.

For compliance with Section 508 of the Rehabilitation Act, grids display floating text descriptions of the contents of grid cells. The text appears one cell above (or one cell below, for cells in the first line of a grid) the selected cell. The text lists row number, column title, and (if applicable) the current value. Clicking once in a cell, or using the Tab key or arrow keys to move to a cell, displays the text. Clicking a second time hides the text.

The first time you log in, the default user ID and password is SYSADMIN. The system then prompts you to change the default password by entering a new password and verifying it. Floating text is always enabled for the SYSADMIN user ID and always appears in the Startup Information dialog box. To disable the floating text, select **Tools**, **Setup**, **Security Users** from the menu bar and create a new user ID and password. Exit the software, and then log in again with your new user ID and password.

For all users other than SYSADMIN, floating text is disabled by default. To enable it, select the **Enable 508 Grid Functionality?** checkbox in the Security Users dialog box.

You can open a student's record directly from the EDExpress toolbar by:

- Typing the original or current **Social Security Number** and clicking **Open**, or
- Selecting the student's original SSN or current SSN by clicking the **ellipsis** (**...**) button and clicking **Open**, or
- Clicking the **ISIR** button to pick a student's ISIR from a list and clicking **Open**.

You can also select **File**, **Open** from the menu bar or press **Ctrl-O** to initiate opening a record. Either action places the cursor in the Original SSN field in the toolbar.

If you have a student's record open, you can open another record by entering or selecting the SSN or ISIR from the toolbar. The first record closes automatically, prompting you to save changes. The next student's record opens to the same module and tab as the previous record.

Select **Open** to open an existing record after entering a student's current SSN or original SSN in the toolbar, or after clicking the ISIR button and selecting a student from the list of ISIRs.

Packaging Setup

Packaging Setup Checklist

Follow the steps below before using the EDExpress Packaging module. The key to successful packaging with EDExpress is to plan and define your school guidelines thoroughly.

- Plan priority order for budget codes and award methodology codes
- Create queries for budget codes, fund maintenance codes, and award methodology codes
- Set up system values
- Establish academic year profiles
- Enter fund maintenance information
- Define award methodologies
- Establish budgets
- (Optional) Define SAP values
- (Optional) Set up a user-defined database (see "Set Up a User Database" section in this desk reference for more information)
- (Optional) Set up user-defined formulas
- (Optional) Write user-defined text (see "Create User-Defined User Letter Text," "Create User-Defined Award Letter Text," and "Create User-Defined Document Tracking Letter Text" in this desk reference for more information)

Important Notes

- If you have not established your assumed school in Global System setup, you must do so before using the Packaging module.
- You can save time by importing much of your Packaging setup from EDExpress 2013-2014. See "Prior Year Import" in this desk reference for additional information.

- If you are using the Packaging module only to print the FISAP–Eligible Dependent Students and FISAP–Eligible Independent Students reports, you only have to set up an academic year profile and a budget before importing ISIRs into Packaging. Refer to the EDExpress Help topic "Set Up Packaging to Print FISAP Reports" for detailed setup instructions.
- Complete all query setups before packaging any records.

Assign Priorities to Packaging Functions

Two packaging elements—Award Methodology and Budgets—are assigned according to priorities you establish.

Priority determines the order in which EDExpress evaluates packaging elements when making assignments, starting at the element with priority closest to 1.

The Packaging module compares the criteria assigned to that element with the student record being processed. If the record meets the given criteria, then that element is assigned to the record and no further elements of this type are considered. If the record does not meet the criteria, EDExpress goes to the element with the next highest priority. Priority is established highest to lowest, 1...999, A...ZZZ.

Example:

Code	Priority	Criteria
030	3	Dependency Status = I
020	2	Dependency Status = D
015	1	Dependency Status = D and Housing = 2

A dependent student who reports housing plans of 3 would not meet the criteria for Code 015. However, the student meets the next criteria and is assigned Code 020.

Important Notes

- The element with the most restrictive criteria should have the priority closest to 1 so that it is assessed and assigned first.
- The last priority should have no selection criteria, so it will include those students whose records are missing elements considered critical by your selection criteria.
- You may want to number the priorities in increments of 5 or 10 to give yourself more flexibility in the future for adding subsequent priorities between the previously created priorities. For example, by establishing priorities 5, 10, 15, etc., you can easily add a priority 13 that processes between priorities 10 and 15.

Packaging System Setup

To set up Packaging system values:

1. Select **Tools**, **Setup** from the menu bar, then choose **Packaging**, **System**.
2. Enter the following values:

Parameter	Description
Total Number of Award Letters to be Printed per Student?	This field defines the number of copies of the award letters to print for each student each time award letters are printed.
Maximum Number of Award Letters to be Sent per Student?	This field defines the number of times an award letter can be printed for an individual student when printing letters for multiple students.
Award Letter Type	This field defines which award letter type you want to print. **O** = Offer Letter **N** = Notification Letter
Allow imported Pell EFC to be Modified?	This field defines whether the Pell EFC is a protected field on records that were not manually entered. Select the checkbox if you want to allow the Pell EFC field to be modified after the ISIR is imported into Packaging.
Packaging Results Default Status	This field defines the packaging results default status on a student record after packaging. The two default options are: **O** = Offered **A** = Accepted
Priority Deadline Date Type	This field defines the date type you want to use as your priority deadline date when indexing for packaging process and reports. Valid priority date types are: **A** = Application Received Date **P** = Processed Date **R** = Ready Date **U** = User-Defined Date If the date type is **U**, the date is taken from the User Database field.

Parameter	Description
User Defined Date Name	This field defines the name of the User Database to be used when determining which student records to include or exclude in running a process. It is enabled only if the priority deadline date type is **U** (User-Defined Date).
Use Low Tuition?	This field enables you to access the Low Tuition Tables for use in packaging students who qualify.
Default Housing Plans	This field defines a default value for manually created records and imported ISIRs with a blank value for Housing Plans. Valid housing plan options are: **1** = On campus **2** = With parent **3** = Off campus

3. Click **OK** to continue.
4. Click **Yes** to save.

Establish Academic Year Profiles

Academic year profiles determine how your funds are divided. Academic Year Profile setup enables you to customize up to five terms, including distribution percentages for seven types of awards. You can create an unlimited number of academic year profiles.

For the academic year profiles, gather and enter information for Federal Pell Grant formulas (standard term, clock-hours, etc.) and distribution percentages for aid programs.

To establish academic year profiles:

1. Select **Tools**, **Setup** from the menu bar, then choose **Packaging**, **Academic Year Profile**.
2. If this is your first time adding an academic year profile, go to Step 3. To add more academic year profiles, click **Add**.
3. Enter or confirm the following values:

Parameter	Description
Code	This code is a four-character code you assign to identify each academic year profile.
Default	This field enables you to define your standard academic year profile for all records when importing from the ISIR database. Each school has only one default profile. However, if the profile is not assigned to any students, you can change this field at any time.
User Modified	The user ID of the person who last modified the academic year profile.
Date Modified	The date the academic profile was last modified.
Title	The title is the 50-character description of the academic year profile you have established.
Pell Grant Formula	This field is based on the school's definition of an academic year. Click the **down** arrow to view a list of valid Pell formulas: 1–Standard-term, credit-hour programs (30 weeks) 2–Standard-term, credit-hour programs (<30 weeks) 3–Any term-based credit-hour programs 4–Clock hour programs and credit-hour programs without terms 5–Correspondence Study, non term-based program 6–Correspondence Study, term-based program
Program Proration Percent	This field specifies the percentage of the student's program to be completed in the academic year. It applies only to: • Standard term credit-hour programs of less than 30 weeks, • Clock-hour and credit-hour programs without terms, and • Correspondence study non-term-based programs

EFC program length to import from the ISIR database	This field sets the EFC Program Length derived from imported ISIR records.
Term	This field identifies a specific term that you designate. For example, Fall, Spring, Term One, Term Two, etc.
Enrollment Status	This field indicates the enrollment status to package for each term you define. For example, full-time, etc.
Percentages	This field defines the percentage of an annual award to post to a given term for each of seven aid types. For example, enter 50% for Perkins % to the first term if you want 50% of the annual Perkins amount awarded in the first term. Percentages cannot exceed 100%.

4. Click **OK** to continue.
5. Click **Yes** to save.

Enter Fund Maintenance Information

In Fund Maintenance setup, you can add and maintain as many aid sources as needed for packaging students. Fund Maintenance also provides you with instant information on the total funds awarded to your financial aid recipients.

To set up Fund Maintenance:

1. Select **Tools**, **Setup** from the menu bar, then choose **Packaging**, **Fund Maintenance**.
2. If this is your first time adding a fund, go to Step 3 below. For more funds, click **Add**.
3. Enter or confirm the following values:

Parameter	Description
User Modified	The user ID of the person who last modified the fund.
Date Modified	The date the fund was last modified.
Fund Code	This code is an abbreviated identification code (of up to eight characters) you assign to identify each fund.
Fund Description	This description is a full description (of up to 25 characters) of the fund you have established.
Aid Type	This field identifies the type of aid associated with this fund. Click the **down** arrow for a list of valid aid types. Aid types **D**, **E**, **F**, **K**, **P**, **S**, **W**, and **U** can be used only once, after which they no longer appear on the list. **E** = Federal Supplemental Education Opportunity Grant (FSEOG) **F** = Federal Pell Grant **G** = Any grant or scholarship, but not Pell Grant or FSEOG **R** = Grant Non-Need Based **K** = Federal Perkins loan **N** = Non-Need Based Loan (NNB) **L** = Other Need Based Loan (NB), not Perkins or Direct **S** = Subsidized Loan (Sub, Need Based) **T** = Teacher Education Assistance for College and Higher Education Grants (TEACH Grant) **U** = Unsubsidized Loan (Unsub, Non-need Based) **D** = Unsubsidized Loan (Unsub, Need Based) **P** = Federal Parent Loan for Undergraduate Students (PLUS) **O** = Outside Resources **V** = AmeriCorps **W** = Federal Work-Study (FWS) **Y** = Other Work-Study

Parameter	Description
Do not remove if unpackaged?	Select this checkbox if you want awards of this fund code to remain unmodified on a student record during the Unpackage process. If you activate this feature and repackage your students, funds may be awarded a second time.
Criteria	Use this field to select queries to determine the group of students eligible to receive this fund.
Beginning Balance	This field represents the beginning balance in your school's account for the upcoming year.
Adjustment to Beginning Balance	This field represents any adjustments (+ or -) to be made to the fund.
Funds Awarded	This field reflects the current amount awarded to your eligible financial aid applicants.
Current Balance	This field represents the current outstanding fund balance remaining for your school to award. Once your current balance reaches zero, you can no longer award this fund to students (unless you enter a positive amount in the Adjustment to Beginning Balance field).
Remaining Need	Click this button to establish minimum and maximum need amounts for this fund. See the following section for additional information.

4. Click **OK** to continue.
5. Click **Yes** to save.

Important Notes

- Make sure that the aid type you selected matches the fund you are creating; for example, **F** = Federal Pell Grant.
- For Fund Maintenance examples, click **Help** in the Fund Maintenance dialog box, then choose the related topic Fund Maintenance Setup Examples.

Enter Remaining Need Information

You can award a specific amount from a fund at different levels of remaining need within the packaging process. For example, if you have a school fund that you want to award for different levels depending on the remaining need of the aid recipient, you can do so with this feature. Remaining need is optional for Packaging.

Example

Fund: School Need-Based Scholarship (Aid Type **G**)

After awarding Stafford loans (Sub/Unsub), if there is still at least $2,500 or greater remaining need, you can direct Packaging to award $500. If at least $2,000 to $2,499 you award $300; if between $500 and $1,999 you award $150.

The following aid types are excluded:

F	Federal Pell Grant
O	Outside Resources
T	Teacher Education Assistance for College and Higher Education Grants (TEACH Grant)
V	AmeriCorps

You can set your remaining need amounts for all funds in Fund Maintenance setup by clicking the Remaining Need button, or you can set (or adjust) the remaining need amounts for each fund in the award methodology by clicking the Values button in the Remaining Need column.

The Remaining Need dialog box contains the following fields:

Minimum Need	Enter the minimum remaining need amount for awarding this fund.
Maximum Need	Enter the maximum remaining need amount for awarding this fund.
Award Amount	Enter the amount of this fund that you will award based on the Minimum and Maximum Need range.

Important Note

- 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 0-500, the next range should start with 501 or higher.

Define Award Methodologies

You can establish methodologies for determining how various funds are awarded to a specific population of students. You must choose whether you will enter maximum percentages or dollar amounts.

For award methodology examples, click **Help** in the Award Methodology dialog box, then choose the related topic Award Methodology Setup Examples.

Important Notes

- **New for 2014-2015**! We expanded the Min EFC and Max EFC fields in the Award Methodology dialog box to six digits to coincide with the increased length of the Primary EFC field on the ISIR.
- For Funds Subsidized Loans (**S**), Unsubsidized Loans Non-need Based (**U**), Unsubsidized Loans Need Based (**D**), and PLUS Loans (**P**), we recommend you leave all 9s for the maximum EFC and the maximum amount. The system will calculate according to the statutory guidelines.
- Since the Federal Pell Grant is a calculated award, you cannot include the Pell Grant in your award methodology. EDExpress automatically awards Pell to eligible students if Pell is correctly defined in Fund Maintenance.
- Use the Criteria field to identify the group of students who will be packaged using this methodology. The criteria listed are created in Query.
- If you need to base your award methodology on EFC ranges, such as for a state grant that uses EFC ranges as criteria, you can have too many ranges to define in one award methodology code and still include other funds. In this situation, you can define Packaging queries for each EFC range. Add the EFC queries as primary query criteria to an equal number of award methodologies, then add the state grant to each methodology by using the Award Min and Award Max fields to control the exact award amount for that EFC range.

To define award methodologies:

1. Select **Tools**, **Setup** from the menu bar, then choose **Packaging**, **Award Methodology**.
2. If this is your first time adding an award methodology, go to Step 3. To add more award methodologies, click **Add**.

3. Enter or confirm the following values:

Parameter	Description
Code	This code is a four-character, user-defined code used to identify the methodologies.
User Modified	The user ID of the person who last modified the award methodology.
Date Modified	The date the award methodology was last modified.
Title	The title is the description (of up to 50 characters) of the award methodology. It should identify which students will be packaged using this methodology.
Priority	This field prioritizes the methodology in relation to other methodologies during the packaging process. During the packaging process, EDExpress selects the highest priority methodology met by the student. Consider creating a generic methodology and give it the lowest priority (in other words, highest number) to ensure every student is packaged, regardless of the criteria used in your other methodologies.
Use Percentages or Use Dollar Amount	These options enable you to use percentages or dollar amounts for the Self-Help and Gift Aid Maximum fields. Select the appropriate option.
Self-Help Aid Maximum	This field identifies the maximum of need to be met with self-help aid during the packaging process. This can be a percentage or a specific dollar amount.
Gift Aid Maximum	This field identifies the maximum of need to be met with gift aid during the packaging process. This can be a percentage or a specific dollar amount.
Criteria	This field determines what methodology is applied to a student's record, using your existing queries.
Fund Code	This field represents the fund codes associated with this award methodology to be used during the packaging process. Click the **down** arrow for a list of available fund codes.
Fund Priority	This field indicates the order in which funds will be awarded within this award methodology. Funds with priority 1 are awarded first.
School Minimum	This field indicates the minimum amount awarded for this fund within the award methodology.
School Max	This field indicates the maximum amount awarded for this fund within the award methodology.

Parameter	Description
Min EFC	This field identifies the minimum EFC allowed for this fund to be packaged when using the award methodology.
Max EFC	This field identifies the maximum EFC allowed for this fund to be packaged when using the award methodology.
Remaining Need	Click the **Value** button to view the remaining need values established in Fund Maintenance setup or to establish a remaining need value at the award methodology level. You can also modify values established in Fund Maintenance.

4. Click **OK** to continue.
5. Click **Yes** to save.

Establish Budgets

A budget defines the cost of attendance for a specified program in a standard academic year. An integral part of packaging at your school begins with assigning a budget for an applicant. In Packaging, you create customized budgets to meet your school's needs. You can create a single budget for your entire applicant population or separate budgets for subsets of your students.

For budget examples, click the **Help** in the Budgets dialog box, then choose the related topic Budget Setup Examples.

To establish budgets:

1. Select **Tools**, **Setup** from the menu bar, then choose **Packaging**, **Budgets**.
2. If this is your first time adding a budget, go to Step 3 below. For more budgets, click **Add**.
3. Enter or confirm the following values:

Parameter	Description
User Modified	The user ID of the person who last modified the budget.
Date Modified	The date the budget was last modified.
Budget Code	This code is a four-character, user-defined abbreviated identification code assigned to each budget. This code appears on the student's record.
Priority	This field enables you to prioritize the order in which EDExpress searches the budget database when assigning budgets. The first budget in which the student meets the selection criteria is used to package that student.
Budget Total	This field is the sum of the budget component amounts you entered, and is display only.
Pell COA	This field is used to calculate Pell awards only and can be modified in individual records and in multiple records using Multiple Entry.
Title	The title is the description of the budget. The title can be up to 50 characters.
Criteria	This field determines which budget is applied to a given student using your existing queries.
Budget Amounts	This field defines the amounts for the six budget components listed: Tuition and Fees, Loan Fees, Room and Board, Books and Supplies, Transportation Cost, and Miscellaneous. These can be left blank.
User Defined Budget Amounts	If the student's budget contains other components, enter the title and amount here.

4. Click **OK** to continue.
5. Click **Yes** to save.

Important Note

- Before packaging, a budget *must* be assigned to each student's record.

Define SAP Values (Optional)

EDExpress enables you to track Satisfactory Academic Progress (SAP) for each of your students. SAP Values give you the ability to develop separate codes for different types of progress. For example: **S** = Satisfactory Progress and **U** = Unsatisfactory Progress.

You can prevent records from being packaged if students do not meet your SAP criteria by creating SAP codes containing the No Packaging Flag. You must add the codes to student records prior to the packaging process. You can define an unlimited number of SAP codes.

For SAP values examples, click the **Help** button in the SAP Values dialog box.

To define SAP codes:

1. Select **Tools**, **Setup** from the menu bar, then choose **Packaging**, **SAP Values**.
2. Enter the following values for each SAP code:

Parameter	Description
SAP Code	This field is a two-character alphanumeric identifier.
No Packaging Flag	This option prevents students with this code from being packaged.
SAP Description	This field is a 50-character description of the code.

3. Click **OK** to continue.
4. Click **Yes** to save.

Set Up User-Defined Formulas (Optional)

User-defined formulas allow you to calculate data by adding, subtracting, multiplying, or dividing two existing fields in the EDExpress database.

For examples of user-defined formulas, click the **Help** button in the lower portion of the User-Defined Formulas dialog box. Use the **down** arrow to scroll to the User-Defined Formulas Examples.

To set up user-defined formulas:

1. Select **Tools**, **Setup** from the menu bar, then choose **Packaging**, **User-Defined Formulas**.
2. Enter or confirm the following values for each formula field you want to add to your database:

Parameter	Description
Table	This setting determines where the value you use in Field 1 resides. Enter: • **S** for a field from the Student Table (student database) • **F** for a field from the Fund Table (fund maintenance database) • **U** for a field from the User-Defined Table (user-defined database)
Field Name	This field lists all the fields that are available from the table chosen in the Database Table 1 Field.
Operand	This option lists the mathematical operations available: addition, subtraction, multiplication, or division.
Table	This setting determines where the value you use in Field 2 resides. Enter: • **S** for a field from the Student Table (student database) • **F** for a field from the Fund Table (fund maintenance database) • **U** for a field from the User-Defined Table (user-defined database)
Field Name	This field lists all the fields that are available from the table chosen in the Database Table 2 field.
Description	This description displays the name of the field that describes the result of your formula.

3. Click **OK** to continue.
4. Click **Yes** to save.

Important Notes

- The calculated results from any previously created user-defined formula can be used as a new formula field (in the **S** or Student database table) in another user-defined formula.
- Set up user-defined formulas *prior* to importing records into the Packaging database.
- You can create a user-defined formula after importing records into Packaging. After importing your records, create the new formula, then select **Process**, **Calculate User-Defined Formulas** from the menu bar to apply the new formula to your records.

Creating Packaging Records

Packaging Entry

You can use three types of entry to establish a packaging record:

- **Manually** enter data from a printed document, such as a SAR, an ISIR, or a paper FAFSA.
- **Import ISIR data** from the application processing module of EDExpress (App Express).
- **Import records** from your school system using the Import External Add option.

Important Note

- If you intend to import records from your school system, you must follow the record layouts found in the *Packaging Technical Reference*. It is available for download in Adobe PDF format from the U.S. Department of Education's Federal Student Aid Download (FSAdownload) Web site, located at fsadownload.ed.gov.

Manual Entry

If a student does not already have a demographic record in the database, follow the steps below to enter the student's record manually.

To enter a student record manually:

1. Select **File**, **New** from the menu bar.
2. Enter the student's SSN.
3. Enter the student's demographic information on the Demo tab. At minimum, you must enter a first or last name. For packaging purposes, enter the student's dependency status.
4. Click **Save**.
5. Click the **Awards** tab.
6. Complete the student's packaging record. Press **F1** for help with completing each field.
7. To save the packaging record, select **File**, **Save** from the menu bar.
8. To return to the EDExpress main screen, select **File**, **Close** from the menu bar

Important Note

- Make sure the correct dependency status appears on the Demo tab. The Packaging module awards funds based in part on the value in this field.

Importing ISIRs

You can quickly establish a student's financial record by importing the student's ISIR data from App Express. The ISIR import process imports the active transaction. See EDExpress Help for more information.

To import ISIRs:

1. Select **File**, **Import** from the menu bar, then choose **Packaging**, **Packaging Data–ISIR Data**.
2. Enter the following values:

Parameter	Description
Report To	Choose **Printer**, **File**, or **Screen** to print, send to a file, or view the Packaging Import ISIR Data report. The report shows the results of the ISIR import process.
Add Budgets?	Choose this option to assign budgets automatically to the students upon import.
Print a list of imported packaging records?	Choose this option to print a list of records added during the ISIR import process.
Academic Year Profile	Choose this option to assign an academic year profile to each record during the ISIR import process. Click the **ellipsis (…)** button to display and select from a list of codes.
Selection Criteria	Choose **Selection Criteria** to narrow the selection of students during the ISIR import process.

3. Click **OK**.

Important Notes

- To avoid packaging a student's record in error, the Packaging module does not import rejected ISIRs from the App Express module.
- You must have at least one academic year profile code defined to import ISIRs. You may also want to set up your budget codes.
- If you import large numbers of ISIRs into Packaging, you may want to consider assigning your budgets at a later time in order to speed up the import process.

- Values for the ISIR field “Interested in Work-Study?” are imported as follows:
  - 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 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.

Importing External Records

You can import records from your school's external system into EDExpress to establish student financial aid records. To use the Import External Add or Change function, you must first create an input file according to the specifications provided in the Packaging Technical Reference, which is available in Adobe PDF format from the U.S. Department of Education's Federal Student Aid Download (FSAdownload) Web site, located at fsadownload.ed.gov.

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

To import external records from your school system:

1. Select **File**, **Import** from the menu bar, then choose **Packaging**.
2. Click the **down** arrow next to Import Type, then click **Packaging Data–External Add**, **Packaging Data–External Change**, or **Packaging Data–Add Fund Amounts**.

Parameter	Description
Add	This option enables you to add packaging records to the Packaging database.
Change	This option enables you to modify specific fields on an existing packaging record on the Packaging database.
Add Fund Amounts	This option enables you to update Fund awards on a student record by importing from an external file.
Report to	This option enables you to view, print, or send the output document to a file to be retained at your school.
Print a list of imported packaging records?	This option enables you to print a listing of records added during the Import External process.
Print Successfully Imported Funds?	This option enables you to print successfully imported funds. Select this checkbox to print the Funds Imported Report upon completion of the import process.

3. Click **OK**.

The Package, Unpackage, and Repackage Processes

The Basic Processes

The Package, Unpackage, and Repackage processes are available in two different modes.

Single Student

Use this method to package, unpackage, or repackage a student's record with the student's record open.

To package, unpackage, or repackage an individual student record:

1. Select **File**, **Open** from the menu bar.
2. Enter the student's SSN.
3. Click **OK**.
4. Click the student's **Awards** tab.
5. Select **Process** from the menu bar, then choose **Package**, **Unpackage**, or **Repackage**.

Multiple Students

Use this method to package, unpackage, or repackage a group of student records by selecting Process, Package from the menu bar, then choosing Selection Criteria. You can also use the Sort By option to sort the records you selected to package. When the process is complete, EDExpress asks if you would like to print a list of packaged students. The list includes the student's name and Social Security Number (SSN).

To package, unpackage, or repackage a group of students:

1. With records closed, select **Process** from the menu bar, then choose **Package**, **Unpackage**, or **Repackage**.
2. Use selection criteria to specify a group of students to package.

3. Use the Sort By option to prioritize the students in your selected group. Click **Help** for more information.
4. Click **OK**.

Note: You can also package, unpackage, or repackage a single student from outside the student's record by following the steps above and using selection criteria to select an individual student.

Package

The Package process creates a student financial aid package for a student or a group of students in your Packaging database.

Important Note

- Note the current Packaging Status field in the upper right corner of the screen:

  H = Hand Packaged

  M = Manually Adjusted Package

  N = Not Ready to Package

  P = Packaged

  R = Ready to Package

  U = Unpackaged

Unpackage

The Unpackage process reverses the Package process. It performs these actions:

- Returns all monies to the funds from which they originated in Fund Maintenance, except for the funds awarded as Outside Resources, Aid Type **O**. These funds (which are often awarded by hand) remain awarded to the student and are not returned to Fund Maintenance.
- Changes the packaging status to **U**.

Important Notes

- The Unpackage process returns awarded funds to the fund accounts you established in Fund Maintenance. Note that awarded funds marked "Do not remove if unpackaged?" are retained on the student record.
- Do not use selection criteria if you want to unpackage all of your packaged records.
- After unpackaging a student, the status flag is changed from **P** (Packaged), **H** (Hand Packaged), or **M** (Manually Adjusted Package) to **U (**Unpackaged).

Repackage

The Repackage process recomputes the entire financial aid package of individual students or groups of students based on changes to their demographic information, financial data, award methodology, or fund values.

Important Note

- To repackage records, the packaging status must be **P** (Packaged), **H** (Hand Packaged), or **M** (Manually Adjusted Package).

Printing Reports

Print Award Letters

In EDExpress, you can print two types of award letters:

- **Financial Aid Award Offer**: Students return this letter to the financial aid office if they want to accept part or all of the award.
- **Financial Aid Award Notification**: Students do not need to return this letter to the financial aid office if they accept the total award. This letter still gives the student the option to decline part or all of the award by marking the declined fund and returning the award letter.

Award letters can be printed for a single student or a group of students.

Since the student's Social Security Number (SSN) is excluded from e-mailed letters for security reasons, the **Exclude SSN?** checkbox is automatically selected and unable to be cleared (unless you select a different print option) when you choose **E-mail** as the letter destination on the Print dialog box.

In Global System setup, you can choose to use the student's E-mail Address 1 or E-mail Address 2 on reports that can be e-mailed directly to students, such as document tracking letters and award letters. E-mail Address 1 is the default value. You can change this setting in the Print dialog box for a specific print job at any time, but the default setting remains the same until you change it in Global System setup.

To print award letters:

1. Select **File**, **Print** from the menu bar, then choose **Packaging**.
2. Click the **down** arrow next to Report and select **Letters–Award**.
3. Click **Single** to print a letter for a single student; click **Multiple** to print a letter for a group of students.
4. Click **Printer**, **File**, **Screen**, or **E-mail** for the output destination. If you print to the screen, the letter count is not affected. If you want to send the report to a file, click the **File** button and type a name for the file, then click **Open**.
5. Enter the following values:

Parameter	Description
Enter SSN	(Single option only) This field is the SSN of the student who will be receiving the letter.
Address	This field specifies the address you want to use. The information is taken from the Demo tab. In Global System setup, you can choose to use the student's permanent or local address on all printed items that include the student's address, such as mailing labels. The student's permanent address is the default value. You can change this setting in the Print dialog box for a specific print job at any time, but the default setting remains the same until you change it in Global System setup.
Sort Order	(Multiple option only) This field specifies the order in which the letters will print. Sort order options are Last Name, SSN, or Zip Code.
Acceptance Date (Offer Letter)	This date is the date by which you want the student to respond to the award package. This date prints on the award letter. The acceptance date is not available for notification letters (this option is dimmed on the screen), but is required for offer letters.
Exclude Heading from Letter?	This option omits the heading "Financial Aid Award Notification XXXX-XXXX Award Year" from the award letter.
Exclude Records with Award Letter Received?	(Multiple option only) This checkbox prevents printing award letters already marked as received.

Parameter	Description
Exclude Needs Analysis?	This option omits the needs analysis detail from the award letter.
Print User Defined Text?	This option prints the text you set up in User-Defined User Letter Text setup.
Print Missing Documents?	This option prints a list of requested documents missing or incomplete from the student's file.
Exclude Signature?	This option omits the signature block on the award letter.
Exclude SSN?	This option excludes the student's Social Security Number (SSN) from the award letter. If you do not select this checkbox, EDExpress masks the first five digits of students' SSNs with Xs and displays only the last four digits (such as XXXXX9999).
Print School Name/Address?	This option is selected automatically by EDExpress. By clearing this checkbox, you are indicating you do not want the school's name and address to print on the award letter.
Print Financial Aid Shopping Sheet?	This option enables you to print the student's Financial Aid Shopping Sheet along with the award letter. You must already have created a record for the student on the Financial Aid Shopping Sheet dialog box (**Tools**, **Financial Aid Shopping Sheet**) for the document to print. You can only use this option if the Report File Destination is printer or screen. You should ensure the award amounts listed on the award letter and Financial Aid Shopping Sheet match before providing both to your students to avoid inquiries about discrepancies. For more information on the Financial Aid Shopping Sheet, see the appendix of this desk reference.

6. Click the **Selection Criteria** button (Multiple option only) if you want to narrow the number of records you want to work with.
7. Click **OK**.

Print FISAP-Eligible Dependent/Independent Students

This option prints a detailed page of student information, including the student's FISAP income range. Also, you can print a report displaying the distribution of all eligible dependent or eligible independent students by income range in your Packaging database. This report is helpful when you are preparing Part II, Section F of the FISAP.

To print FISAP-eligible dependent/independent student information:

1. Select **File**, **Print** from the menu bar, then choose **Packaging**.
2. Click the **down** arrow next to Report and select **FISAP–Eligible Dependent Students** or **FISAP–Eligible Independent Students**.
3. Click **Printer**, **File**, or **Screen** as the output destination. If you want to send the report to a file, click the **File** button and type a name for the file, then click **Open**.
4. Select the **Print Details?** checkbox for a student-by-student listing of records included in the FISAP summary report.
5. Click **OK**.

Important Notes

- The FISAP is the Fiscal Operations Report and Application to Participate for Funds.
- For further information on completing the FISAP, see the FISAP Form and Instructions on the IFAP Web site.
- If you package a student but the student does not attend your school, unpackage and delete that student's packaging record so that the student does not appear on the FISAP grid in EDExpress.
- To print the FISAP–Eligible Dependent Students and FISAP–Eligible Independent Students reports if you do not use Packaging, you need to set up a basic academic year profile and budget before importing ISIRs into the Packaging module. Refer to the EDExpress Help topic "Set Up Packaging to Print FISAP Reports" for detailed setup instructions. Keep in mind that when you request funds for 2015-2016, you will report student information for the 2014-2015 award year, so make sure you print FISAP information from the correct version of EDExpress.

Print Lists

Using this option, you can print a variety of lists and other items. These include:

Lists

- List–Fund Maintenance
- List–Students by Fund Code
- List–Packaged Students
- List–Unpackaged Students
- List–Entered Packaging Records
- List–Packaging Setup
- List–Funds Forecast

Other Items

- Packaging Record
- Measurement Tools–Funds
- Record Layout–User Defined Formats
- Student Summary

To print lists:

1. Select **File**, **Print** from the menu bar, then choose **Packaging**.
2. Click the **down** arrow next to Report and select the item that you want to print.
3. Click **Printer**, **File**, or **Screen** as the output destination. If you want to send the report to a file, click the **File** button and type a name for the file, then click **Open**.

   If you print to a file, no hard copy prints on your printer. To print a hard copy, repeat the print process and select **Printer** as your output destination.
4. Depending on the item you selected, select the remaining options available to you on the screen.
5. (Optional) Click **Selection Criteria** to select specific records or to use a query to select a group of records.
6. Click **OK**. If you chose Screen as your output destination, use the **scroll bars** to view the list. Click **Close** when you have finished.

Exporting Packaging Data

Packaging Export

EDExpress enables you to export Packaging data to an external system.

To export Packaging data:

1. Close any records that are open.
2. Select **File**, **Export** from the menu bar, then choose **Packaging**.
3. Confirm that **Packaging Data** appears in the Export Type field. The default path and file name appear in the Export To field.
4. If you want to export using a different file name, click the **File** button and type a name for the file, then click **Save**.
5. Select the export status.

   Note: When you create a packaging record, the display-only External Export flag on the Awards tab is set to **Y**, indicating that the record can be exported in an External Export file. Selecting **Y** as the Export Status exports packaging records that have **Y** as the External Export flag. If the packaging record is not complete, or if you have previously exported the packaging record, the External Export flag is set to **N**.

   Selecting **N** as the Export Status exports packaging records that have **N** as the External Export flag. Selecting Both exports packaging records with either **Y** or **N** as the External Export flag. If you make changes to a student's packaging record that has **N** as the External Export flag, the External Export flag changes back to **Y**.
6. Select the delimiter type.
7. Type the format code in the Format Code field, or click the **ellipsis (…)** button to select from a list of format codes.
8. (Optional) Click **Selection Criteria** to narrow the group of records you want to export. When you are finished, click **OK**.

9. Click **OK** to export the data. EDExpress exports the file to the file shown in the Export To field, and an In Progress dialog box appears.
10. Click **OK** to close the In Progress dialog box when the export is finished.

Important Notes

- To use the Export feature in Packaging, you must establish a file format. See the topic "File Formats (Packaging)" in the EDExpress Help for more information.
- The default export message class is PKEX15IN.

Query

Rules for Queries

A query is a set of criteria that describes a particular student population. Queries are used in functions like Print and Export to select specific groups of student records from all records in the database. Some queries have fixed values, and for others you can enter different values each time you use the query.

Queries are specific to individual modules, so you must create your queries in the modules in which you intend to use them. For example, if you need a query to use when printing a list of ISIRs, you must create the query in the App Express module.

When creating your own queries, consider these basic rules:

- Queries are processed from left to right, or beginning to end; however, AND is applied first, even if it appears after OR in the query statement.
- Parentheses change the order of precedence. Expressions enclosed in parentheses are processed before AND and OR. In the case of nested expressions, innermost parentheses are processed first. See the topic "Using Parentheses" in Help for more information.
- Both segments of the query connected by AND must be true for a record to be selected.
- Only one of the segments connected by OR must be true for a record to be selected.

Helpful Hints!

- Select the **Field to Field Comparison** checkbox to build a query that compares numeric fields within one record. For example, if a student has two ISIR transactions, a field-to-field query in App Express compares the numeric fields in the 01 transaction only with the other numeric fields in the 01, not with the numeric fields in the 02. This option is not available if you selected Prompt at Execution or Current Date. See "Field to Field Queries" in this desk reference for examples.

- Select **Help**, **Help Topics** from the menu bar, then choose **Contents**, **Query**, **Dialog boxes**, **Query dialog box** for information about:
  - Query dialog box
  - Query Grid dialog box
  - Parameter Query Entry dialog box
  - View Query dialog box

Creating a Query

For information about creating complex queries with nested expressions, see the topic "Rules for Queries" in Help.

To create a query:

1. Select **Tools**, **Query** from the menu bar.
2. Click the tab of the module for which you want to create the query.
3. Click **Add**.
4. Type a descriptive title for the query. The title can consist of any keyboard character except the pipe symbol (|) and apostrophe (').
5. Select a field from the Field list. You can type the first letters of a field to find the field name that begins with those letters.
6. Click the **down** arrow in the Operator field to select an operator.
7. Type a value for the field. Click the **Value Help** button to see the valid values for the field.

   Tip: If you want to be prompted for a value at the time you use the query, do not specify a value for the query statement. Instead, select the **Prompt at Execution** checkbox. Note that Prompt at Execution queries cannot be used with Packaging setup.
8. Click the **Append** button to add the query statement to the Criteria field.
9. (Optional) Click the **And** button or the **Or** button to add another statement to the query.
10. Repeat steps 5 through 9 until you have added all statements for the query, then continue with step 11.
11. Click **Save** to save the query. Click **OK**.
12. Click **OK** to close the Query dialog box or click **Add** to create another query.

Creating a Query from a Predefined Query

EDExpress comes with a set of predefined queries commonly used in EDExpress modules. Wherever the Selection Criteria option is available in EDExpress, you can use these queries to identify groups of records. See "Using a Query" in this desk reference for more information.

You can also use predefined queries as templates to create your own queries.

When you open Query for the first time, you will see that the predefined queries are stored as the first set of records in the Query database. You will know a query is predefined if the Query Title is PREDEFINED QUERY.

Use the Query function to create queries that are most useful to your school and the way you process data.

To create a query from a predefined query:

1. Select **Tools**, **Query** from the menu bar.
2. Click the tab of the module for which you want to create the query.
3. Click the **Retrieve** button. Use the arrow buttons in the database buttons box to locate the predefined query you want to use for a template. Click **OK**.
4. Type a new title for the query. You can modify and save a predefined query only if you rename it.
5. To delete a line, select the line and click **Remove**. To add a new line, select the line in the Criteria field above where you want to add the new line. Specify the Field, Operator, and Value for the new line, then click **Append**. Use the other buttons located to the right of the Criteria field to fine-tune the query statement, if necessary.
6. Click **Save** to save the query. Click **OK**.
7. Click **OK** to close the Query dialog box or click **Add** to create another query.

Important Note

- Parameter (Prompt at Execution) queries cannot be used with Packaging setup (for example, Fund Maintenance and Award Methodology).

Modifying a Query

To modify a query:

1. Select **Tools**, **Query** from the menu bar.
2. Click the tab of the module for the query you want to modify.
3. Click the **Retrieve** button. Use the arrow buttons in the database buttons box to locate the query you want to modify.
4. Modify the query. Click any criteria line to select it and change the Field, Operator, or Value. Then click the **Change** button. You can also delete lines or add new lines to the query.

   To delete a line, select the line and click **Remove**. To add a new line, select the line in the Criteria field above where you want to insert the new line. Specify the Field, Operator, and Value for the new line, then click **Append**. Use the other buttons located to the right of the Criteria field to fine-tune the query statement, if necessary.
5. Click **Save** to save the query. Click **OK**.
6. Click **OK** to close the Query dialog box.

Using a Query

You can use queries in any function where you see a Selection Criteria button, such as when you are printing lists, importing ISIR data into Packaging, exporting packaging data, using multiple entry, and packaging, unpackaging, and repackaging student records.

To use a query:

1. Click the **Selection Criteria** button.
2. Click the **ellipsis (…)** button next to the Query Title field to display a list of queries. The Query Grid dialog box appears.
3. Click the query you want to use to select it.
   - If the Parameter Query column is not selected, click **OK**. EDExpress returns you to the Selection Criteria dialog box and enters the title of the query in the Query Title field. Skip to step 8.
   - If the Parameter Query column is selected, click **OK**. EDExpress returns you to the Selection Criteria dialog box and enters the title of the query in the Query Title field. Click **OK** again and the Parameter Query Entry dialog box appears.
4. Click in the **Field Value** column next to each Field Name and type a valid value. Click the **Value Help** button to see a list of valid values.

   If you leave a value blank, EDExpress automatically enters NULL as the value. When you run the query, records that contain NULL for that field value are selected.
5. Click the **View Query** button to see the completed query. Review the query carefully to be sure you have entered the correct values for each field.
6. Click **Close** to return to the Parameter Query Entry dialog box.
7. Click **OK** to save your entries.
8. Click **OK** to run the query. An In Progress dialog box displays the progress of the process.
9. Click **OK** to clear the In Progress dialog box.

Sample Queries

Here are three examples of queries that you can use in processing your students' financial aid data. See "Using a Query" for instructions on how to use these queries.

Sample 1

Dependent students from New Mexico whose parents' number in college is greater than 1 or whose adjusted gross income is less than $25,000.

Click the **App Express** tab.

((DEPENDENCY STATUS = 'D') AND

(STUDENT'S STATE OF LEGAL RESIDENCE = 'NM')) AND

((PARENTS' NUMBER IN COLLEGE > '1') OR

(PARENTS' ADJUSTED GROSS

INCOME < '25000'))

Sample 2

Graduate students under 2000 EFC who are not packaged

Click the **Packaging** tab.

(EFC-PACKAGING < 2000) AND

((COLLEGE GRADE LEVEL-PACKAGING = '6') OR

(COLLEGE GRADE LEVEL-PACKAGING = '7')) AND

((PACKAGING STATUS = 'N') OR

(PACKAGING STATUS = 'R') OR

(PACKAGING STATUS = 'U'))

Sample 3

Independent students assigned documents required for packaging and/or verification.

Click the **Packaging** tab.

((DOCUMENT STATUS = 'P') OR

(DOCUMENT STATUS = 'V') OR

(DOCUMENT STATUS = 'B')) AND

(DEPENDENCY STATUS = 'I')

Field to Field Queries

The Field to Field option helps you build a query that compares numeric fields within one record. For example, if a student has two ISIR transactions, a field to field query compares the numeric fields in the 01 transaction only with the other numeric fields in the 01, not with the numeric fields in the 02. This option is not available if you marked Prompt at Execution or Current Date.

Examples of Field to Field Queries

As an example of how to use this function, you can query on taxes paid as a percentage of AGI. The statement would look something like this:

PARENTS' U.S. INCOME TAX > PARENTS' ADJUSTED GROSS INCOME * 0.10 (or other decimal for the percentage you choose)

More examples:

PARENT 1'S INCOME EARNED FROM WORK > PARENTS' ADJUSTED GROSS INCOME

PARENT 2'S INCOME EARNED FROM WORK > PARENTS' ADJUSTED GROSS INCOME

STUDENT'S INCOME > STUDENT'S ADJUSTED GROSS INCOME

STUDENT'S U.S. INCOME TAX PAID > STUDENT'S ADJUSTED GROSS INCOME * 22 (or other decimal for the percentage you choose)

Deleting a Query

To delete a query:

1. Select **Tools**, **Query** from the menu bar.
2. Click the tab of the module for the query you want to delete.
3. Use the arrow buttons in the database buttons box to locate the query you want to delete. You cannot delete predefined queries.
4. Click **Delete** in the database buttons box. EDExpress asks you to confirm that you want to delete the query.
5. Click **Yes** to delete the query.
6. Click **OK** to continue.

Bits and Bytes

Message Classes (Sent by CPS)

Data Type	Message Class	Data Description
Daily	IDAP15OP	Daily ISIRs that are the result of application records submitted by your school
Daily	IDSA15OP	Daily ISIRs that are generated for all schools listed on the record
Daily	IDRE15OP	Daily ISIRs for State Agency residents
Daily	IDNR15OP	Daily ISIRs for State Agency non-residents
CPS Pushed	IGCO15OP	Daily ISIRs that are the result of correction records submitted by your school
CPS Pushed	IGSA15OP	Pushed automatic ISIRs that are generated for all schools listed on the record except the school that submitted the correction
CPS Pushed	IGSG15OP	Pushed ISIRs generated for all schools listed on the record that are a result of system-generated processing by the CPS Note: IGSG files are sent to schools when new transactions are system-generated by the CPS for circumstances such as reprocessing, NSLDS post-screening, or Department of Homeland Security (DHS) automated secondary confirmation.

Message Classes (Sent by CPS) (Continued)

Data Type	Message Class	Data Description
CPS Pushed	IGRE15OP	Pushed ISIRs for State Agency residents
CPS Pushed	IGNR15OP	Pushed ISIRs for State Agency non-residents
Requested	ISRF15OP	ISIRs requested directly from the ISIR Datamart
Errors	EAPR15OP	Error records from processing of application data
Errors	CORE15OP	Error records from processing of correction data
Errors	SIGA15OP	Error records from processing of signature records

Helpful Hint!

For record layouts, see the *EDE Technical Reference*, which is available for download in Adobe PDF format from the U.S. Department of Education's Federal Student Aid Download (FSAdownload) Web site, located at fsadownload.ed.gov.

Downloading EDExpress Software and Documentation

EDExpress 2014-2015, Release 1.0, is distributed on the Internet. You can download the software and the related user documentation in Adobe PDF format from the U.S. Department of Education's Federal Student Aid Download (FSAdownload) Web site, located at fsadownload.ed.gov.

The following types of documentation are available to download for EDExpress:

- *EDExpress for Windows 2014-2015 Cover Letters*
- *EDExpress for Windows 2014-2015 Installation Guide*
- *EDExpress for Windows 2014-2015 Desk References*
- *2014-2015 EDExpress Packaging Technical Reference*
- *2014-2015 Electronic Data Exchange (EDE) Technical Reference*
- *2014-2015 Common Origination and Disbursement (COD) Technical Reference, Volume III (Pell Grant, TEACH Grant & Direct Loan Combination System Supplement)*

Instructions for downloading EDExpress software and documentation are located in the "Downloading Documentation from the FSAdownload Web Site" section of the *EDExpress for Windows 2014-2015 Installation Guide*. The amount of time it takes to download a file depends on the file size and the speed of your Internet connection.

If you experience difficulties with the EDExpress 2014-2015, Release 1.0 software, contact CPS/SAIG Technical Support at **800/330-5947** (**TDD/TTY 800/516-5806**), or by e-mail at CPSSAIG@ed.gov.

Important Note

- Some organizations block their employees' ability to download software from the Internet. If you have trouble downloading EDExpress, try again later. If you are still unable to download, contact your technical support staff to ensure you have full download rights.

Getting Help

Help System

General help is available from the menu bar within EDExpress. You can view the main list of help topics by selecting **Help**, **Help Topics**, **Contents** from the EDExpress menu bar. Use the **Search** tab on the Help screen to locate specific words or phrases anywhere within Help. Also, field help is available by selecting a field and pressing the F1 key.

Helpful Hints!

- Open the Help Contents books to access Help topics. Each book contains several individual Help topics.
- Check the How Do I? topics for frequently performed procedures by selecting How Do I? from the Help menu.

CPS/SAIG Technical Support

For questions regarding technical assistance and software functionality, call CPS/SAIG Technical Support at:

800/330-5947

TDD/TTY: 800/516-5806

Customer service representatives are available 8 a.m. – 8 p.m. (ET), Monday through Friday, excluding federal holidays. You can also e-mail your inquiries to CPS/SAIG at CPSSAIG@ed.gov.

Technical References

Technical references are manuals provided to postsecondary schools and third-party servicers. These manuals include record layouts, data entry specifications, import and export formats, and print specifications that you can use to develop your own EDE system or software to interface with EDExpress. The three technical references that are available from the U.S. Department of Education's Federal Student Aid Download (FSAdownload) Web site, located at fsadownload.ed.gov, are:

- The ***2014-2015 EDE Technical Reference***, which is a compilation of record layouts, processing codes, and ISIR printing formats provided to assist EDE participants in developing their own software to interface with EDExpress.
- The ***2014-2015 Packaging Technical Reference***, which is a compilation of record layouts for adding and changing records in the Packaging module of EDExpress.
- The ***2014-2015 Common Origination and Disbursement (COD) Technical Reference***, which provides processing information and technical specifications for the Common Record and includes record layouts for adding and changing records in EDExpress.

Appendix – Financial Aid Shopping Sheet

Overview

The Financial Aid Shopping Sheet is a consumer tool created by the U.S. Department of Education in collaboration with the Consumer Finance Protection Bureau that is designed to simplify information that students receive about costs and financial aid so they can make informed decisions about which postsecondary institution to attend. The Financial Aid Shopping Sheet is a one-page document that provides students with an easy-to-read projection of basic attendance costs (such as tuition, room and board, etc.) and a forecast of grant and loan eligibility. It also lists basic financial information about your school, such as its graduation rate, loan default rate, and median borrowing.

EDExpress 2014-2015 includes functionality that enables you to set up and print the Financial Aid Shopping Sheet for students at your school. You can customize information printed on the Financial Aid Shopping Sheet, use existing EDExpress student records or create unique records to use as a basis for the document, and print, e-mail, and export Financial Aid Shopping Sheet data.

You do not need to be a regular EDExpress user to take advantage of the Financial Aid Shopping Sheet functionality in EDExpress 2014-2015. After completing basic software setup to define information about your school's costs, you can manually create and print the Financial Aid Shopping Sheet for your students in the software.

Important Note!: The appearance of the Financial Aid Shopping Sheet relies upon graphics that are downloaded from the Internet during the print process. If you do not have an Internet connection during the print process, the document will not appear as intended visually and may lead to student inquiries as a result.

This appendix to the *2014-2015 EDExpress for Windows Release 1.0 Desk Reference* provides guidance on using Global and Packaging functionality in EDExpress 2014-2015 to implement use of the Financial Aid Shopping Sheet at your school.

The following areas are covered in this appendix:

- Financial Aid Shopping Sheet Profile Setup
- Financial Aid Shopping Sheet Record Entry

- Financial Aid Shopping Sheet External Import
- Financial Aid Shopping Sheet Print and Export
- Financial Aid Shopping Sheet External Import Record Layout
- Where to Get More Information

For additional information and guidance regarding Financial Aid Shopping Sheet functionality in EDExpress 2014-2015, see the software's help text.

Financial Aid Shopping Sheet Profile Setup

The Financial Aid Shopping Sheet generated by EDExpress uses two sets of data to determine what to display on the document – information about your school provided by the National Center for Education Statistics (NCES) and loaded to the EDExpress database, and information you define about your school's attendance costs in EDExpress Global setup.

You must define at least one Financial Aid Shopping Sheet profile in Global setup in order to generate the Financial Aid Shopping Sheet for your students using EDExpress. Each Financial Aid Shopping Sheet profile is tied to a specific OPE ID used by your school and collects specific cost of attendance information that is printed on the document.

While you are only required to create one Financial Aid Shopping Sheet profile to generate the Financial Aid Shopping Sheet, we recommend that you define additional profiles for the different student populations at your school that have varying costs of attendance. For example, you may want to print a different version of the document for undergraduate students than for graduate students, or generate unique documents for each program of study.

Before you begin defining profiles for the Financial Aid Shopping Sheet in EDExpress, we recommend that you gather some basic information about financial costs at your school. This information, which may vary depending on the academic programs you offer, student living arrangements, and other factors, includes the following:

- Tuition and fees
- Housing and meals
- Books and supplies
- Transportation
- Other education costs

By entering values for these data elements as part of a Financial Aid Shopping Sheet profile, you can reduce data entry time later in the process by pre-filling certain document fields with values that apply to a specific student population at your school.

To set up a Financial Aid Shopping Sheet profile:

1. Select **Tools**, **Setup** from the menu bar, then choose **Global**, **Financial Aid Shopping Sheet Profile**.
2. If this is your first time adding a Shopping Sheet profile, go to Step 3. To add more profiles, click **Add**.
3. Enter your school or campus OPE ID, or click the **ellipsis (…)** button to the right of the OPE ID field and select your code from the list. You can use the same OPE ID on multiple profiles, provided that the Profile Name you enter for each is unique.

Note: If your school was recently assigned an OPE ID, your code and associated information provided by NCES may not be available in EDExpress for selection. If this occurs, enter **00000000** for the OPE ID in your Shopping Sheet profiles. This workaround will allow you to use Financial Aid Shopping Sheet functionality in EDExpress, although some of the document fields will be printed with blank values.

4. Enter or confirm the following additional values to complete your Financial Aid Shopping Sheet profile:

Parameter	Description
Profile Name	Enter a name for the Financial Aid Shopping Sheet profile you are creating. This should be a brief, descriptive phrase that easily identifies the applicable student group for the profile.
Estimated Cost of Attendance	This display-only calculated field indicates the sum total of the values you enter in the Tuition and fees, Housing and meals, Books and supplies, Transportation, and Other education costs fields.
Tuition and fees	Enter the tuition and fees costs applicable to this shopping sheet profile. Valid values are 000000-999999 and blank.
Housing and meals	Enter the housing and meals costs applicable to this shopping sheet profile. Valid values are 000000-999999 and blank.
Books and supplies	Enter the books and supplies costs applicable to this shopping sheet profile. Valid values are 000000-999999 and blank.
Transportation	Enter the transportation costs applicable to this shopping sheet profile. Valid values are 000000-999999 and blank.
Other education costs	Enter the amount of additional education costs applicable to this shopping sheet profile. Valid values are 000000-999999 and blank.
Default	Select the **Default** checkbox if this is the Financial Aid Shopping Sheet profile you anticipate using with the majority of the students for whom you will create a Financial Aid Shopping Sheet.
Comments	Enter up to 255 characters of user-defined text associated with this Financial Aid Shopping Sheet profile. This text is printed at the bottom of the Financial Aid Shopping Sheet.

5. Click **OK** to continue.
6. Click **Yes** to save.

Important Notes

- After a Financial Aid Shopping Sheet profile is assigned to a student record, the profile becomes locked and cannot be modified in Global setup until it is removed from all student records it is assigned to. To resolve this issue, create a new Financial Aid Shopping Sheet profile or, alternatively, modify cost of attendance values or comment text on the student record as needed prior to saving, printing, or exporting the document.

- If you do not currently use EDExpress, and you only want to use the Financial Aid Shopping Sheet functionality, you should first complete your assumed school and security setup. Review the earlier sections of this desk reference for guidance on completing these setup areas.
- You can use Global Security Groups setup (**Tools**, **Setup**, **Global**, **Security Groups**) in EDExpress to limit the access of specific users to Financial Aid Shopping Sheet functions such as entry or printing. For guidance on defining security groups in EDExpress, see the "Defining Security" section earlier in this desk reference.

Financial Aid Shopping Sheet Record Entry

After defining at least one Financial Aid Shopping Sheet profile in Global setup, you can begin creating the student records in EDExpress that serve as the basis for the Financial Aid Shopping Sheet.

Note: One of the goals of the Financial Aid Shopping Sheet is to provide your students with a comprehensive listing of the financial aid package that they can anticipate receiving at your school or institution. Before you begin creating Financial Aid Shopping Sheet records, we recommend you gather as much current information as possible regarding grant, work-study, and loan awards the student may be eligible to receive, including aid from your school and private, state, and federal sources.

Financial Aid Shopping Sheet records can be created in one of two ways: you can create single records manually in the Financial Aid Shopping Sheet dialog box, or you can add or modify multiple student records using external import. For more information on importing Financial Aid Shopping Sheet data from your external system, see the "Financial Aid Shopping Sheet External Import" section later in this appendix.

You can view, create, and modify Financial Aid Shopping Sheet records in the Financial Aid Shopping Sheet dialog box, which is accessible from the Tools menu. You are not required to have an existing student record in EDExpress to create a Financial Aid Shopping Sheet record. However, if you do have an existing EDExpress record for a student, you can select it when creating a Financial Aid Shopping Sheet record to automatically fill certain fields with demographic data.

To enter a Financial Aid Shopping Sheet record manually:

1. Select **Tools**, **Financial Aid Shopping Sheet** from the menu bar.
2. To create a new record, enter the student's **Original SSN** in the **Create** box and click **New**, or click the **ellipsis (…)** button to the right of the Original SSN field to display a list of students with demographic records. Use the scroll bars to locate the record and click **OK** to select it.

   Note: To open an existing Financial Aid Shopping Sheet record, enter the student's **Original SSN** in the **Open** box and click **Open**, or click the **ellipsis (…)** button to the right of the Original SSN field to display a list of existing Financial Aid Shopping Sheet records. Use the scroll bars to locate the record and click **OK** to select it.
3. Enter the name of the **Shopping Sheet Profile** you want to use for this Financial Aid Shopping Sheet record. You can also click the **ellipsis (…)** button to the right of the Shopping Sheet Profile field to display a list of existing Financial Aid Shopping Sheet profiles in Global setup. Use the scroll bars to locate the profile you want to use, then click **OK** to select it.

4. In the Student Information section, enter the student's **First Name**, **Middle Initial**, **Last Name**, **Student ID**, and **E-mail Address**.

   Note: If you selected an existing EDExpress student demographic record in step 2, the student's name and e-mail address fields are filled with values from the student's Demo tab.

   Note: Use the optional Student ID field to provide an identifier for the student that is specific to your school or entity. The Student ID value is not masked on the Financial Aid Shopping Sheet, so use caution if your identifier is based on the student's Social Security Number.

5. Verify the amounts listed in the **Tuition and fees**, **Housing and meals**, **Books and supplies**, **Transportation**, and **Other education costs** fields listed in the Costs section of the dialog box are correct and modify as necessary. The values displayed in these five fields default to the amounts you defined in Global setup for the Shopping Sheet profile you selected in step 3. The Estimated Cost of Attendance field displays the calculated sum total of the five Costs section fields.

6. In the Grants and scholarships section, enter values in the **Grants from your school**, **Federal Pell Grant**, **Grants from your state**, and **Other scholarships you can use** fields as appropriate based on the student's estimated award package. Valid values are 0-999999. The Total Grants and Scholarships field displays the calculated sum total of the four Grants and Scholarships section fields.

   Note: The Net Costs field, located below the four Grants and scholarships section fields, is a calculated field that subtracts the Estimated Cost of Attendance field value from the Total Grants and Scholarships field value.

7. In the Loan options section, enter values in the **Federal Perkins Loan**, **Federal Direct Subsidized Loan**, and **Federal Direct Unsubsidized Loan** fields as appropriate based on the student's estimated award package. Valid values are 0-999999.

8. Enter the amount of work-study the student is eligible to receive in the **Work-Study (Federal, state, or institutional)** field. Valid values are 0-999999.

9. Enter the student's EFC in the **Family Contribution** field. Valid values are 0-999999.

   Note: If you selected an existing EDExpress student demographic record in step 2 that has an active ISIR transaction selected on the ISIR Review tab to create a Financial Aid Shopping Sheet record, the Family Contribution field is filled with the EFC from the designated ISIR transaction.

10. Verify the text in the **Comments** field and modify as needed. The text displayed in this field initially defaults to the Comments text you defined in Global setup for the Shopping Sheet profile you selected in step 3.

11. Click **Save** to save the Financial Aid Shopping Sheet record.

12. Select **Printer**, **E-mail**, or **File** to print the document, attach it to an e-mail, or export the Financial Aid Shopping Sheet data to an XML file, respectively. See the "Financial Aid Shopping Sheet Print and Export" section in this appendix for more information regarding these three functions.
13. Return to step 2 and repeat the process for additional Financial Aid Shopping Sheet records you need to create, or click **Close** to close the dialog box.

Important Notes

- If you frequently modify the **Tuition and Fees**, **Books and Supplies**, **Housing and Meals**, **Transportation**, **Other Educational Costs**, and **Comments** field values on individual Financial Aid Shopping Sheet records, consider creating additional Financial Aid Shopping Sheet profile records in Global setup to cover additional scenarios and save yourself future data entry effort. You may also want to update Global setup to designate a different profile that is applicable to more students as the default when creating new records.
- If you are using a Financial Aid Shopping Sheet profile associated with the OPE ID 00000000, consider adding comments text to the Financial Aid Shopping Sheet that provides contact information or a Web site address where your students can find more information about your school.
- When exporting Financial Aid Shopping Sheet data to an XML file (by clicking the File button on the Financial Aid Shopping Sheet dialog box), the default export file name is the first four characters of the student's last name and the first four letters of the student's first name, followed by a file extension of .xml. For example, an export file for John Smith is named smitjohn.xml by default. You can change the file name as needed prior to running the export. We recommend you add your school name to the export file name in the event that the student receives Financial Aid Shopping Sheet data from multiple schools.

Financial Aid Shopping Sheet External Import

Interfacing your school's system with EDExpress reduces the effort of preparing Financial Aid Shopping Sheet data by importing student data from your existing systems into EDExpress. You can also take advantage of the built-in edits in EDExpress to ensure that your records contain valid data.

To import Financial Aid Shopping Sheet data from another system into EDExpress, you must format the data according to the record layout listed in the "Financial Aid Shopping Sheet External Add/Change Record Layout" later in this appendix.

You use the same external import record layout to add new Financial Aid Shopping Sheet records or modify existing records in EDExpress. The following two fields are required when adding Financial Aid Shopping Sheet records:

- Student's Original Social Security Number (SSN)
- Shopping Sheet Profile Name

If more than one record with the same original SSN exists in an external file, only the first record is imported. Duplicate records are skipped automatically unless you select the Prompt for Duplicate checkbox in the import dialog box.

When creating an external import file to modify existing Financial Aid Shopping Sheet records, you only need to include the student's original SSN and the field values you want to update; if your import file contains a blank value, the corresponding field value in EDExpress, if it exists, is not overwritten to blank upon import.

To modify existing records with your import file, you **must** select the Prompt for Duplicates checkbox in the Import dialog box. With the prompt for duplicates option selected, EDExpress prompts you for the following actions when it encounters a duplicate record:

- **Skip?** This option skips the current record and the import process advances to read the next record in the file. No updates are made to the current record.
- **Skip All?** This option skips the current record and all other duplicates without notification. No updates are made to any of the duplicate records that are found. EDExpress does not prompt you when it finds duplicates during the process.
- **Update?** This option prompts you to update the current record and continues processing with the next record. The update option processes the current record, then advances to the next record and prompts you again when another duplicate record is found. You should choose this option if your import file has a mix of add and change records and the record indicated is a modification to an existing Financial Aid Shopping Sheet record.

- **Update All?** This option updates the current record and all other duplicate records throughout the process without warning you of duplicate records found. You should choose this option if all the records in your import file are modifications to existing Financial Aid Shopping Sheet records.

To import a Financial Aid Shopping Sheet external file:

1. Select **File**, **Import** from the menu bar, then choose **Global**.
2. Click the **down** arrow next to the Import Type field and select **Financial Aid Shopping Sheet External Add/Change**.
3. Click the **File** button under Import From to select the location and name of the FAEA15OP file that has the data you want to import.
4. Choose the file destination for the Import Records Edit Report: **Printer**, **File**, or **Screen**. If you choose **File**, select the location and type the file name for the report. Remember that if you print to a file, no paper copy is printed on your printer, but you can print this file using word processing software.
5. Select the **Prompt for Duplicates?** checkbox to identify records that are already in your database during the import. You should select this option if you are modifying existing Financial Aid Shopping Sheet records in your database with your import file.
6. Click **OK** to begin the import. An In Progress dialog box appears.
7. (Optional) If you selected the Prompt for Duplicates? checkbox in step #5 and the import process matches the original SSN of a record in your import file to a Financial Aid Shopping Sheet record in your EDExpress database, a dialog box appears listing the duplicate SSN and the options to **Skip**, **Skip All**, **Update**, or **Update All**.

   Select **Update** or **Update All** if you want to update the Financial Aid Shopping Sheet records with the information in the import file; otherwise, click **Skip** or **Skip All**. Repeat as necessary for subsequent duplicate records identified during the import, depending on the option you select.
8. When the import is complete, the In Progress dialog box displays the number of records accepted or in error, as well as the total number of records identified in the import file.
9. Click **OK** to close the In Progress dialog box.
10. Review the results on the Import Records Edit Report. If errors occurred, correct them in your import file, resave the file, and import the file again.

After you have successfully added or modified your Financial Aid Shopping Sheet records through external import, you can review the imported information on the Financial Aid Shopping Sheet dialog box and proceed with print and export options as needed. See the "Financial Aid Shopping Sheet Print and Export" section in this appendix for more information regarding the print and export functions.

Important Notes

- The process of importing Financial Aid Shopping Sheet data from an external system parallels the EDExpress Pell Grant module's external import process. For more detailed information on the Pell Grant external import process, see Section 1 of the *2014-2015 COD Technical Reference*, Volume III, which is available for download from the FSAdownload Web site.
- EDExpress receives data from external systems without a header and trailer record but does require ASCII format, with the end of each record marked with carriage return/line feed characters (ASCII 13 and 10). After the last record there is no end of file marker (EOF), only the final carriage return/line feed marker.
- 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 original SSN, a reject or warning message, and the data field in question (if appropriate).
- You must provide a Shopping Sheet profile name in your import file unless you are updating an existing record.

Financial Aid Shopping Sheet Print and Export

After creating Financial Aid Shopping Sheet records, the final step in the process is to generate the Financial Shopping Sheet document for your students. EDExpress enables you to print single or multiple Financial Aid Shopping Sheet documents, attach the document to an e-mail, and export Financial Aid Shopping Sheet data to an XML file.

To create the Financial Aid Shopping Sheet, EDExpress uses the information you enter or import for the student's record, as well as the Shopping Sheet profile you associate with the record. Some graphic elements in the document, such as Graduation Rate and Loan Default Rate, are generated dynamically based on NCES information regarding the OPE ID you select in the Shopping Sheet profile.

Important Note!: The appearance of the Financial Aid Shopping Sheet relies upon graphics that are downloaded from the Internet during the print process. If you do not have an Internet connection during the print process, the document will not appear as intended visually and may lead to student inquiries as a result.

To print, e-mail, or export a Financial Aid Shopping Sheet from an open record:

1. Select **Tools**, **Financial Aid Shopping Sheet** from the menu bar.
2. Open an existing Financial Aid Shopping Sheet record or create a new record. See the "Financial Aid Shopping Sheet Record Entry" and "Financial Aid Shopping Sheet External Import" sections earlier in this appendix for guidance on creating records.
3. Click the **Printer** button to generate a printed version of the Financial Aid Shopping Sheet.

   Click the **E-mail** button to attach an electronic version of the Financial Aid Shopping Sheet to an e-mail message using the default e-mail software on your PC. The student's E-mail Address value from the record is automatically used in the "To" line. **Note**: If the E-mail Address field is blank on the record, you will receive an error message when you try to use this option.

   Click the **File** button to export the Financial Aid Shopping Sheet data from the student record to an XML file on your PC. You must provide a location on your PC for the file to be saved. All major Financial Aid Shopping Sheet fields and data are included in the export file

You can also print single or multiple Financial Aid Shopping Sheet documents from the Global Print menu (**File**, **Print**, **Global**).

Important Notes

- The Financial Aid Shopping Sheet can be printed to a color or black-and-white printer.
- If you print a Financial Aid Shopping Sheet document to your printer, and the printed page has blank boxes in certain sections, the required graphics files may not have downloaded correctly during the printing process. Check your Internet connection and try printing again.

- The Financial Aid Shopping Sheet was designed to print as a single-page document. If you e-mail the Financial Aid Shopping Sheet to your students from EDExpress as an HTML attachment, we recommend advising them to resize the document prior to printing to ensure it fits on a single page.
- The street address and Web site information for your school that appears on the Financial Aid Shopping Sheet is derived from NCES information associated with the OPE ID you choose for the Financial Aid Shopping Sheet profile you add to the student's record.
- You can also print the Financial Aid Shopping Sheet simultaneously with award letters you print using the EDExpress Packaging module. You should ensure the award amounts listed on the award letter and Financial Aid Shopping Sheet match before providing both to your students to avoid inquiries about discrepancies. For more information, see the "Print Award Letters" section earlier in this desk reference.
- When printing multiple Financial Aid Shopping Sheet documents from the Global Print dialog box, if you print 100 or more records to the screen, the print preview window only displays 100 records at a time. Use the **Showing Records** field to switch from the initial set of records displayed to successive groupings of up to 100 records each.
- If you print the Financial Aid Shopping Sheet to a file from the Global Print dialog box, the file is created in HTML format.

Financial Aid Shopping Sheet External Add/Change 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 Must be nine digits. Cannot be blank.	Left
2	10	25	16	Last Name	Numbers 0-9 Uppercase letters A to Z Space . (period) ‘ (apostrophe) - (dash) Can be blank	Left
3	26	37	12	First Name	Numbers 0-9 Uppercase letters A to Z Space . (period) ‘ (apostrophe) - (dash) Can be blank	Left
4	38	38	1	Middle Initial	Uppercase letters A to Z Can be blank.	Left

Field #	Start Position	End Position	Field Length	Field Name	Valid Field Content	Justify
5	39	50	12	Student ID	0 to 9 Uppercase A to Z ! (Exclamation) @ (At) # (Pound) $ (Dollar) % (Percent) ^ (Caret/Power) & (Ampersand) * (Asterisk/Multiplication) ((Open Parenthesis)) (Closed Parenthesis) - (Negation/Subtraction) = (Equal) \ (Backward Slash) + (Plus/Addition) ~ (Tilde) : (Colon) ; (Semi-Colon) ‘ (Apostrophe) “ (Quotation) < (Less than) > (Greater than) ? (Question mark) , (Comma) . (Period) / (Forward Slash/Division) [(Open Bracket)] (Closed Bracket) { (Open Brace) } (Closed Brace) Can be blank	Left

Field #	Start Position	End Position	Field Length	Field Name	Valid Field Content	Justify
6	51	100	50	Student E-mail Address	Only one “at” sign (@) is allowed. Before the “at” sign: • Use at least one valid character • all characters in the range of ASCII 33-126, except for the following thirteen characters: < > ( ) [ ] \ , ; : " @ | • period cannot be first, last or adjacent to another period. After the “at” sign: • use at least one valid character • only letters, digits, hyphen, underscore and period (A-Z, a-z, 0-9, -, _, .) • Hyphen, underscore, or period cannot be first, last, or adjacent to a period Can be blank	Left
7	101	106	6	Grants from your school	Must be numeric Valid Values: 000000-999999 Can be blank.	Left
8	107	112	6	Federal Pell Grant	Must be numeric Valid Values: 000000-999999 Can be blank.	Left
9	113	118	6	Grants from your state	Must be numeric Valid Values: 000000-999999 Can be blank.	Left
10	119	124	6	Other scholarships you can use	Must be numeric Valid Values: 000000-999999 Can be blank.	Left

Field #	Start Position	End Position	Field Length	Field Name	Valid Field Content	Justify
11	125	130	6	Perkins Loans	Must be numeric Valid Values: 000000-999999 Can be blank.	Left
12	131	136	6	Direct Subsidized Loan	Must be numeric Valid Values: 000000-999999 Can be blank.	Left
13	137	142	6	Direct Unsubsidized Loan	Must be numeric Valid Values: 000000-999999 Can be blank.	Left
14	143	148	6	Work-Study	Must be numeric Valid Values: 000000-999999 Can be blank.	Left
15	149	154	6	Family Contribution	Must be numeric Valid Values: 000000-999999 Can be blank.	Left

Field #	Start Position	End Position	Field Length	Field Name	Valid Field Content	Justify
16	155	204	50	Shopping Sheet Profile Name	Any valid keyboard character except underscore (_) and pipe (|). See Valid Field Content for Student ID (field #5) for specific valid value list If adding a new record, field value must correspond to a Financial Aid Shopping Sheet Profile Name value defined in EDExpress Global setup (**Tools**, **Setup**, **Global**, **Financial Aid Shopping Sheet**) Can be blank if updating an existing Financial Aid Shopping Sheet record in EDExpress If EDExpress matches the Financial Aid Shopping Sheet Profile name in your import file to a value in Global setup, the following fields are filled on the student's Financial Aid Shopping Sheet record in EDExpress based on the values you provided for the profile in setup if the field data is blank or invalid in the import file: • Tuition and fees • Housing and meals • Books and supplies • Transportation • Other education costs	Left
17	205	210	6	Tuition and fees	Must be numeric Valid Values: 000000-999999 Can be blank.	Left
18	211	216	6	Housing and meals	Must be numeric Valid Values: 000000-999999 Can be blank.	Left

Field #	Start Position	End Position	Field Length	Field Name	Valid Field Content	Justify
19	217	222	6	Books and supplies	Must be numeric Valid Values: 000000-999999 Can be blank.	Left
20	223	228	6	Transportation	Must be numeric Valid Values: 000000-999999 Can be blank.	Left
21	229	234	6	Other education costs	Must be numeric Valid Values: 000000-999999 Can be blank.	Left

Field #	Start Position	End Position	Field Length	Field Name	Valid Field Content	Justify
22	235	489	255	Comments	0 to 9 Uppercase A to Z ! (Exclamation) @ (At) # (Pound) $ (Dollar) % (Percent) ^ (Caret/Power) & (Ampersand) * (Asterisk/Multiplication) ((Open Parenthesis)) (Closed Parenthesis) - (Negation/Subtraction) = (Equal) \ (Backward Slash) _ (Underscore) + (Plus/Addition) ~ (Tilde) : (Colon) ; (Semi-Colon) ‘ (Apostrophe) “ (Quotation) < (Less than) > (Greater than) ? (Question mark) , (Comma) . (Period) / (Forward Slash/Division) [(Open Bracket)] (Closed Bracket) { (Open Brace) } (Closed Brace) Can be blank	Left
		489		**Total Bytes**		

Where to Get More Information

- U.S. Department of Education Web site for Financial Aid Shopping Sheet, located at http://www2.ed.gov/policy/highered/guid/aid-offer/index.html.
- *Dear Colleague Letter GEN-12-12*, posted on July 25, 2012 to the IFAP Web site.
- *Dear Colleague Letter GEN-13-05*, posted on January 30, 2013 to the IFAP Web site.
- EDExpress for Windows 2014-2015 Online Help. For basic guidance and information on using the EDExpress software, select **Help**, **Help Topics** from the EDExpress menu bar. You can view the main list of EDExpress help topics by module on the Contents tab or scroll through available help topics on the Index tab.
- For technical support for EDExpress, call CPS/SAIG Technical Support at **800/330-5947** (**TDD/TTY 800/511-5806**), 8 a.m. to 8 p.m. ET, Monday through Friday, excluding federal holidays. You can also e-mail your inquiries to CPS/SAIG at CPSSAIG@ed.gov.
- For policy questions related to the use of the Financial Aid Shopping Sheet, send an e-mail to ShoppingSheet@ed.gov.