

June 2014

RE: EDEExpress for Windows 2014-2015, Release 3.0

Dear EDEExpress Users:

Federal Student Aid is pleased to announce the availability of EDEExpress for Windows 2014-2015, Release 3.0. Release 3.0 updates the William D. Ford Federal Direct Loan (Direct Loan) and Teacher Education Assistance for College and Higher Education (TEACH) Grant modules to implement critical enhancements related to the 150% Direct Subsidized Loan Limit and other new data reporting requirements for the 2014-2015 award year. Release 3.0 also implements enhancements to Financial Aid Shopping Sheet functionality.

Important Note: You must upgrade to Release 3.0 to originate or export Direct Loan and TEACH Grant records to the Common Origination and Disbursement (COD) System for the 2014-2015 award year. If you created Direct Loan or TEACH Grant records using EDEExpress 2014-2015, Release 2.0, you must update the records with new required origination and disbursement data elements in Release 3.0 to finalize the records for processing by the COD System. For more information, see the “Updating COD Setup and Direct Loan and TEACH Grant Records Created in EDEExpress 2014-2015, Release 2.0” section below or the “Guidance for EDEExpress 2014-2015 Direct Loan and TEACH Grant Users on Updating Software Setup and Existing Records after Release 3.0 Upgrade” electronic announcement posted in June 2014 to Federal Student Aid’s Information for Financial Aid Professionals (IFAP) Web site located at ifap.ed.gov.

About this Cover Letter

This letter includes the following information:

- An overview of EDEExpress 2014-2015, Release 3.0
- Guidance regarding updating COD Setup and records created in the Direct Loan and TEACH Grant modules in Release 2.0
- A list of Global, Direct Loan, and TEACH Grant enhancements available in Release 3.0
- Information on how to obtain the software and documentation
- Microsoft Vista, Windows 7, and Windows 8 Compatibility and Section 508 Compliance notices
- Contact information for technical support and additional assistance

For information regarding the availability of the 2014-2015 COD System, see the [April 2, 2014](#) and [April 4, 2014](#) electronic announcements posted to Federal Student Aid’s Information for Financial Aid Professionals (IFAP) Web site located at ifap.ed.gov.

Additional information regarding 150% Direct Subsidized Loan Limit policy and requirements, including frequently asked questions and sample calculations, is also available on the IFAP Web site at <http://ifap.ed.gov/150PercentDirectSubsidizedLoanLimitInfo/index.html>.

EDEExpress for Windows 2014-2015, Release 3.0 Overview

EDEExpress 2014-2015, Release 3.0 adds new functionality to the Global, Direct Loan, and TEACH Grant modules, as well as a new COD Setup option. Release 3.0 does not modify the Pell Grant functionality installed with Release 2.0.

Release 3.0 can be installed as an upgrade to Release 2.0 (posted in April 2014). You must have Release 2.0 installed to run an upgrade (or “custom”) installation of Release 3.0.

Reminder: Before upgrading to Release 3.0, ensure you have a reliable backup copy of your current EDEExpress 2014-2015 production database (**expres15.mdb**).

To upgrade to Release 3.0, select the Stand Alone Custom or Workstation Custom option during installation, depending on your EDEExpress operating environment.

If you have not previously installed EDEExpress 2014-2015, you can proceed directly to a Stand Alone Full or Network Server/Workstation Full installation of Release 3.0. Be aware, however, that a Stand Alone Full or Network Server/Workstation Full installation loads a new, blank EDEExpress 2014-2015 database to your system. If you have a 2014-2015 database, a Stand Alone Full or a Network Server/Workstation Full installation of Release 3.0 will overwrite your database and all previously entered 2014-2015 data will be lost.

For more technical guidance and information regarding the EDEExpress installation process, see the [Installation Guide for EDEExpress for Windows 2014-2015](#), which is available for download from the U.S. Department of Education’s Federal Student Aid Download (FSAdownload) Web site at fsadownload.ed.gov.

Updating COD Setup and Direct Loan and TEACH Grant Records Created in EDEExpress 2014-2015, Release 2.0

EDEExpress 2014-2015, Release 3.0 implements new functionality related to Public Law 112-141. This legislation eliminates the subsidy on Direct Subsidized loans when a new borrower’s enrollment time exceeds 150% of the published length of the 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, Direct PLUS loan (Parent PLUS and Grad PLUS), FFEL loan, consolidation and/or converted TEACH Grant on or after July 1, 2013. New borrowers who meet or exceed the 150% Direct Subsidized Loan Limit are not eligible for additional Direct Subsidized loan awards.

To address this legislative requirement, as well as other new 2014-2015 award year requirements that also impact TEACH Grant records, we added multiple new origination and disbursement data elements to setup, entry, import, and other functions in the Direct Loan and TEACH Grant modules in Release 3.0.

Earlier this year, we advised EDEExpress Direct Loan and TEACH Grant users to avoid originating or exporting data from either module for processing by the COD System until we posted Release 3.0. We explained that the Direct Loan and TEACH Grant modules in Release 2.0 excluded new origination and disbursement fields required by the COD System for the 2014-2015 award year, and that the absence of these data elements would cause any records you

exported from either module using Release 2.0 and transmitted to the COD System to be rejected.

In the [March 27, 2014 electronic announcement](#) and other user documentation associated with Release 2.0, we emphasized that, despite these limitations, Direct Loan and TEACH Grant users could safely use Release 2.0 functionality to begin preparing records for COD System processing, including establishing COD Setup parameters and creating origination records. We noted that Direct Loan and TEACH Grant records created in Release 2.0 would require additional updates after you upgraded to Release 3.0.

The new functionality implemented in Release 3.0 enables you to complete these final preparatory steps and commence processing of your 2014-2015 Direct Loan and TEACH Grant records quickly and efficiently. After installing Release 3.0, you can finalize your COD Setup parameters and update existing Direct Loan and TEACH Grant records you created in Release 2.0 for processing by the COD System by completing the following tasks:

- **Update Disbursement Profiles (Direct Loan only)** – Disbursement profiles you created in Release 2.0 for use with Direct Loan records must be updated in COD Setup (**Tools, Setup, COD, Disbursement**) to add the PP (Payment Period) Start Date associated with each disbursement date before you can use the profile on new records. When you save PP Start Date updates to a disbursement profile in setup, Release 3.0 performs a one-time update to add the PP Start Date to anticipated disbursement records in your database that were assigned the disbursement profile code previously.

Note: Disbursement profiles created for use with TEACH Grant records do not require updates for PP Start Date unless you selected both the DL and TEACH checkboxes for the profile. This also applies to disbursement profiles with the DL and Pell checkboxes selected, as well as profiles with all three checkboxes selected.

- **Complete Program Profile Setup (Direct Loan only)** – The new Program Profiles setup option (**Tools, Setup, COD, Program Profiles**) provides an efficient method of updating your Direct Loan records with default values for a majority of the new origination field values required to finalize the records for processing by the COD System. After creating program profiles in Release 3.0 for each major program of study at your school, you can assign the appropriate program profile code to your existing Direct Loan records using Direct Loan Multiple Entry, an External Change (DIEC15OP) import file, or by manually selecting the profile on the new Usage Limit Applies Info sub-tab of the Origination (Direct Loan) tab.
- **Complete CIP Codes Setup (Direct Loan and TEACH Grant)** – Beginning with the 2014-2015 award year, you must provide a (Classification of Instructional Program) Code with each new Direct Loan anticipated or actual disbursement for all loan types. This requirement also applies to new TEACH Grant disbursements. In EDEExpress 2014-2015, Release 2.0, we added the CIP Codes setup option (**Tools, Setup, COD, CIP Codes**). Any CIP Code values you define using this setup option are available for use when creating or modifying Direct Loan, TEACH Grant, or Pell Grant records in Release 3.0. Although you can choose to enter CIP Code values manually when required in lieu of completing CIP Codes setup, be aware you may reduce potential data entry errors and subsequent corrections if you define the CIP Code values you use most frequently in setup and then select the values from a list where possible.

- **Update CIP Code and Enrollment Status on Origination Tab (Direct Loan and TEACH Grant)** – Beginning with the 2014-2015 award year, you must report the CIP Code and Enrollment Status value associated with each new Direct Loan anticipated and actual disbursement for all loan types. This requirement also applies to TEACH Grant disbursements. To address this change, we added CIP Code and Enrollment Status fields to the new Usage Limit Applies Info sub-tab of the Origination (Direct Loan) tab; both field values are now required to originate loan records. We also added CIP Code to the Origination (TEACH Grant) tab and made the existing TEACH Grant Enrollment Status field required to prepare the record for export.

After installing Release 3.0, update the CIP Code and Enrollment Status values on your existing Direct Loan and TEACH Grant records manually on the Origination tab, by using Multiple Entry, or by importing the field values in an external change file.

- **Review and Update New Required Direct Loan Origination Fields** – In addition to CIP Code and Enrollment Status values, you must provide values for the following new Release 3.0 fields for all loan types before you can originate Direct Loan records: Published Program Length (in years, months, or weeks), Special Programs, Program Credential Level, and Weeks Program Academic Year. You can update most of these fields by assigning a program profile code to your records using Direct Loan Multiple Entry or by importing an external change file. Alternatively, you can update the fields manually on the new Usage Limit Applies Info sub-tab of the Origination (Direct Loan) tab.

Note: Use the Special Programs field value of **N** (Not Applicable) for students who are not enrolled in a qualifying special program. Also, the Weeks Program Academic Year field value is only required if you measure the Published Program Length in weeks or months **OR** if you provide a Special Programs field value of **P** (Preparatory Coursework Graduate Professional Program). For more information on valid values for the new Direct Loan origination fields, see the *2014-2015 COD Technical Reference, Volume II, Section 1* (Implementation Guide).

See the next section for more detailed information regarding the enhancements described in the steps above and other related features we added in Release 3.0.

Release 3.0 Enhancements

The following enhancements have been incorporated into EDEExpress 2014-2015, Release 3.0:

Global

- **Financial Aid Shopping Sheet Expanded to Two Pages, Fields and Text Revised** – We implemented several enhancements to Financial Aid Shopping Sheet functionality in EDEExpress 2014-2015, Release 3.0. These enhancements include expanding the document to two pages, with the new second page displaying a glossary of common financial aid terminology and a new comments section for which you can define custom text. You can define custom text for the 2nd page Comments section in Financial Aid Shopping Sheet Profiles setup (under **Tools, Setup, Global**).

Note: For more information regarding 2014-2015 enhancements to the Financial Aid Shopping Sheet, see [Dear Colleague Letter GEN-13-26](#), posted on December 13, 2013 to the IFAP Web site and updated subsequently on February 10, 2014.

COD Setup

- **New CIP Code Setup** – We added a new setup dialog box to COD setup in EDEExpress 2014-2015, Release 2.0 called CIP Code. This setup option enables you to define multiple Classification of Instructional Programs (CIP) Codes that you can later select from a list when creating or modifying Direct Loan, TEACH Grant, or Pell Grant records, saving you data entry time. The CIP Code values you define in this setup option can be selected by clicking the ellipsis button (...) next to the CIP Code fields in the Import dialog box and Origination tab for the respective modules.

The CIP Code data element, which is a six-digit code (with an implied decimal between the second and third digit) representing the student's college major, is required in Release 3.0 and by the COD System for 2014-2015 for all new anticipated and actual Direct Loan disbursements for all loan types and for all new anticipated and actual TEACH Grant disbursement records.

The CIP Code is optional for Pell Grant records in EDEExpress 2014-2015 and is not required or processed by the COD System for Pell Grant records for the 2014-2015 award year.

- **New Program Profile Setup and Report** – We added a new COD setup option in EDEExpress 2014-2015, Release 3.0 called Program Profiles. This setup option enables you to create profiles containing default values for many of the new required Direct Loan origination record fields located on the Usage Limit Applies Info sub-tab on the Origination (Direct Loan) tab. Click **Tools, Setup, COD, Program Profiles** to access this new setup dialog box.

You can reduce data entry effort when creating Direct Loan records if you define program profile codes in Setup that are associated with each distinct student population or program at your school. When you assign a program profile code to a Direct Loan origination record, the software auto-fills the corresponding fields on the Usage Limit Applies Info sub-tab with the values you defined in Setup for that code.

Each profile you establish in Setup must contain a unique program profile code and description. The COD System requires Program Credential Level, Published Program Length, Published Program Length Units (Weeks, Months, or Years), and (conditionally) Weeks Program Academic Year for all loan types beginning with the 2014-2015 award year. In order to originate a Direct Loan record in EDEExpress 2014-2015, Release 3.0, you must provide values for Program Credential Level, Published Program Length, Published Program Length Units (Weeks, Months, or Years), Special Programs, and (conditionally) Weeks Program Academic Year.

Note: Unlike disbursement profile codes, program profile codes are not required to save or originate Direct Loan records. However, if you do not define program profile codes, you must enter values for each of the new required fields manually on the Origination (Direct Loan) tab, use Direct Loan Multiple Entry to update the field values, or include the field values in a Direct Loan External Add (DIEA15OP) or External Change (DIEC15OP) import file.

We also added a new COD report called the List–Program Profile Setup Report, which provides a quick-reference listing of the profiles you have defined in Program Profiles setup. The report includes the Program Profile Code, Description, Program Credential Level, Published Program Length, Special Programs, and Weeks Program Academic Year field values associated with each profile. To print this report, select **File, Print, COD** and choose **List–Program Profile Setup** as the report type.

- **Payment Period Start Date Added to Disbursement Profile Setup and List–Disbursement Profiles Report** – We added the Payment Period Start Date (labeled as PP Start Date in some EDEExpress functions) in Release 3.0 as a required field on the Disbursement Profiles setup dialog box for profiles marked as applicable to Direct Loan. The Payment Period Start Date is now required by the COD System for each Direct Loan anticipated and actual disbursement record for all loan types, beginning with the 2014-2015 award year.

When you assign a disbursement profile code to a Direct Loan record, the PP Start Date values associated with the disbursement profile code are included with the anticipated disbursements created on the Disburse (Direct Loan) tab.

We also added the PP Start Date field values associated with disbursement profile codes to the List–Disbursement Profile Setup report. To print this report, select **File, Print, COD** and choose **List-Disbursement Profile Setup** as the report type.

Direct Loan

Import

- **CIP Code, Enrollment Status, Program Profile Code Fields Added to ISIR and Packaging Import Dialog Box** – We modified the Direct Loan Import dialog box for the Loan Data–ISIRs and Loan Data–Packaging import types to add optional CIP Code, Enrollment Status, and Program Profile Code fields. If you enter or select values for these fields, EDEExpress presents a secondary dialog box after you initiate the import that enables you to adjust each field’s value for individual records being imported.

The CIP Code and Enrollment Status values you designate for the import are used to update the corresponding field values on the new Usage Limit Applies Info sub-tab of the Origination (Direct Loan) tab and on each anticipated disbursement record on the Disburse (Direct Loan) tab. The program profile code you designate for the import updates multiple required origination fields on the Usage Limit Applies Info sub-tab using the default values you define for the code in the new Program Profiles setup option.

Note: The CIP Code, the Enrollment Status, and the multiple new 2014-2015 field values updated by using a program profile code are required to originate Direct Loan records for all types beginning with EDEExpress 2014-2015, Release 3.0. While you are not required to do so, updating these field values during the import process can reduce data entry time later in the process.

- **CIP Code, Enrollment Status, Payment Period Start Date, and Multiple Other New Fields Added to Direct Loan External Add and Change Imports** – We added the Subsidized Usage Limit Applies, CIP Code, Enrollment Status, Payment Period Start Date, and multiple other new fields to the record layout for the Loan Data–External Add (DIEA) import files and assigned new import change field numbers associated with these fields that you can include in Loan Data–External Change (DIEC) import files.

Note: To import external Direct Loan data into Release 3.0, you must use the June 2014 version of the Direct Loan External Import Loan Origination Add record layout and Direct Loan External Import Change field numbers in the *2014-2015 COD Technical Reference, Volume III, Section 3: Combination System Record Layouts*. The technical reference is available for download from the FSAdownload Web site.

Note the following additional information regarding Release 3.0 external import enhancements:

- If you include a disbursement profile code in your external import file, EDEExpress adds or updates the payment period start date values you associated with each disbursement date in Disbursement setup on the anticipated disbursements created or modified on the Disburse (Direct Loan) tab as a result of the import. If you do not include a disbursement profile code in an external add file, you must provide a payment period start date value with each disbursement.
- If you add or update the program profile code in your external import file, EDEExpress updates new required origination fields located on the new Usage Limit Applies Info sub-tab of the Origination (Direct Loan) tab with the values you defined for the fields in Program Profile setup. You can also add or update values for the following new origination fields individually in your import files, in lieu of using a program profile code: Program Credential Level, Published Program Length, Published Program Length Unit, Special Programs, and Weeks Program Academic Year.

When importing external data, EDEExpress uses the CIP Code and Enrollment Status field values in your file to update the corresponding fields on the Origination (Direct Loan) tab and each anticipated disbursement record on the Disburse (Direct Loan) tab.

- **COD Common Record Receipt/Response Import Type Updated to Include Subsidized Usage System-Generated Response Files** – You can now import the Subsidized Usage System-Generated Response (message class CRSU15OP) into EDEExpress 2014-2015 using the Direct Loan module’s COD Common Record Receipt/Response import type.

The Subsidized Usage System-Generated Response is a new import file generated automatically by the COD System for the 2014-2015 award year when a Direct Loan origination record’s calculated Subsidized Usage Limit Applies (SULA) values change as a result of activity occurring for your borrower at another institution.

During the import of Subsidized Usage System-Generated Response file, EDEExpress attempts to match the data in the file to an existing Direct Loan record in your database. If the software finds a matching record, the import updates the applicable COD-calculated, display-only fields on the new Usage Limit Applies Info sub-tab of the Origination (Direct Loan) tab with the values provided in the import file. The COD-Calculated Information grid only appears on the Usage Limit Applies Info sub-tab if the loan record's Subsidized Usage Limit Applies field is set to **Yes** (Subsidized Usage Limit Applies). You can also select COD-calculated fields in Direct Loan file formats for inclusion in external export files.

See Volume II, Section 1 of the *2014-2015 COD Technical Reference* for additional information regarding Subsidized Usage System-Generated Response files and the circumstances in which they are generated by the COD System.

- **COD Common Record Receipt/Response Import Type Updated to Include Origination Fee and Interest Rebate Percentage Acknowledgement Files** – You can now import the Origination Fee and Interest Rebate Percentage Acknowledgement (message class CROF15OP) into EDEExpress 2014-2015 using the Direct Loan module's COD Common Record Receipt/Response import type. The Origination Fee and Interest Rebate Percentage Acknowledgement is a new import file the COD System will begin generating automatically in September 2014 to correct Direct Loan anticipated disbursements that were submitted with amounts calculated using incorrect Origination Fee and/or Interest Rebate Percentages based on the anticipated disbursement date. Federal Student Aid will provide more information about this new response file in forthcoming communications.

The Origination Fee and Interest Rebate Percentage Acknowledgement import edit report lists the Direct Loan records successfully updated by the import, as well as the original and new values for the origination fields modified by the COD System.

Note: If you receive frequent record rejections from the COD System due to incorrect fee calculations, you may need to update the default loan fee percentage values EDEExpress uses when creating Direct Loan records. You can update the default Sub/Unsub Loan Fee Percentage and the PLUS Loan Fee Percentage in Direct Loan School setup (**Tools, Setup, School, Direct Loan**).

Note: The U.S. Department of Education may revise the loan origination fee percentages for subsidized/unsubsidized and PLUS/Grad PLUS loans in the future due to legislative or regulatory changes. To ensure you are using the correct percentage values in Setup for the loan types you are working with and, as a result, calculating disbursement amounts correctly in EDEExpress, refer to the valid values listed for the different loan types for the Origination Loan Fee Percentage field in the Direct Loan external import add record layout in the *2014-2015 Common Origination and Disbursement (COD) Technical Reference*, Volume III.

Entry

- **Usage Limit Applies Info Sub-tab Added to Origination (Direct Loan) Tab** – Beginning with EDEXpress 2014-2015, Release 3.0, the following new field values are required to originate Direct Loan records for all loan types: Published Program Length (in years, months, or weeks), Special Programs, Program Credential Level, and Weeks Program Academic Year. You must also provide a CIP Code, Enrollment Status, and Payment Period Start Date value with each anticipated or actual disbursement.

All new fields except for Payment Period Start Date are located on the top half of the new Usage Limit Applies Info sub-tab of the Origination (Direct Loan) tab. The CIP Code and Enrollment Status values on the Usage Limit Applies Info sub-tab are used automatically for anticipated and actual disbursement records on the Disburse (Direct Loan) tab. The Payment Period Start Date assigned to each disbursement record is associated with the disbursement profile code you assign to the loan record.

The COD System also returns new person-level calculated values for all SULA-qualifying borrowers and new loan-level calculated values for applicable Direct Subsidized loan records in the COD Common Record Response (CRAA15OP), the Web-Generated Response (CRWB15OP), and the new Subsidized Usage Calculation Change System-Generated Response (CRSU15OP). Release 3.0 displays most of these new field values, which include data regarding the student's remaining Direct Subsidized loan eligibility, in the display-only COD-Calculated Information grid on the bottom half of the Usage Limit Applies Info sub-tab (the new Subsidized Usage Limit Applies field displays in the top half of the sub-tab). The COD-Calculated Information grid only appears if the loan record's Subsidized Usage Limit Applies field is set to **Yes** (Subsidized Usage Limit Applies).

- **CIP Code, Enrollment Status, and Payment Period Start Date Fields Added to Disburse Tab Grid** – Beginning with the 2014-2015 award year, the COD System requires that you provide a CIP Code, Enrollment Status, and Payment Period Start Date value with each new anticipated or actual Direct Loan disbursement. To facilitate the reporting of these new data elements, we added new CIP Code, Enrollment Status, and Payment Period Start Date (labeled as PP Start Date) columns to the Disburse (Direct Loan) tab grid.

The CIP Code and Enrollment Status values displayed in the Disburse tab grid for each disbursement number match the values saved for the corresponding fields on the new Usage Limit Applies sub-tab of the Origination (Direct Loan) tab at the time the anticipated or actual disbursement transaction was created. To update the CIP Code and Enrollment Status associated with an anticipated or actual Direct Loan disbursement, you must first modify and save the corresponding field value on the Origination tab; you cannot modify CIP Code or Enrollment Status values manually within the Disburse tab grid.

When you assign a disbursement profile code to a Direct Loan record, the PP Start Date values associated with the disbursement profile code are included with the anticipated disbursements created on the Disburse tab. Unlike CIP Code and Enrollment Status, Payment Period Start Dates for anticipated disbursements can be modified directly in the Disburse tab grid.

- **New Disbursement Types Added to Adjust CIP Code, Enrollment Status, and Payment Period Start Date on Actual Disbursements** – Adjustments to the new CIP Code, Enrollment Status, and Payment Period Start Date values on Direct Loan actual disbursements must be submitted in separate sequence numbers from adjustments to other disbursement data elements, similar to updates to accepted disbursement dates, disbursement amounts, and Enroll OPE ID values.

To facilitate adjustments to these new data elements in EDEExpress 2014-2015, Release 3.0, we added Disbursement Type values **C** (Adjusted Disbursement CIP Code Change), **S** (Adjusted Disbursement Enrollment Status Change), and **T** (Adjusted Disbursement Payment Period Start Date Change).

To update the CIP Code associated with an accepted actual disbursement in a new sequence number, correct and save the new value on the Origination tab first, then use Disbursement Type **C** (Adjusted Disbursement CIP Code Change) in the Action section of the Disburse tab to add the adjustment. Follow this process to correct the Enrollment Status as well, except you must select Disbursement Type **S** on the Disburse tab.

To adjust the PP Start Date value on an accepted actual disbursement, select Disbursement Type **T** (Adjusted Disbursement Payment Period Start Date Change) in the Action section on the Disburse tab and enter the new date in the field provided.

Note: You can also use the new disbursement types of C, S, and T in Direct Loan Multiple Entry or External Change (DIEC15OP) files to modify the CIP Code, Enrollment Status, or Payment Period Start Date values, respectively, associated with a Direct Loan actual disbursement.

- **New Required Origination and Disbursement Fields Added to Multiple Entry** – We updated Direct Loan Multiple Entry to include the new Direct Loan origination fields and disbursement fields required for the 2014-2015 award, as well as the new Program Profile Code field, which is associated with the new Program Profile setup. Note the following guidance:
 - If you add or update the new Program Profile Code field using Multiple Entry, EDEExpress updates most of the new required fields on the Usage Limit Applies Info sub-tab with the values you defined for the code in Program Profiles setup.
 - When you update the CIP Code or Enrollment Status value using multiple entry, the corresponding origination tab field and all anticipated disbursements are updated automatically with the new value.
 - To update the CIP Code associated with an accepted actual disbursement in a new sequence number using multiple entry, select the appropriate disbursement number and Disbursement Type **C** (Adjusted Disbursement CIP Code Change). Likewise, to update the Enrollment Status associated with an accepted actual disbursement in a new sequence number, select the appropriate disbursement number and Disbursement Type **S** (Adjusted Disbursement Enrollment Status Change) in Multiple Entry. In either case, Multiple Entry uses the current field value from the Origination tab to update the new disbursement sequence number unless you provide a new value during your Multiple Entry update.

Export

- **New Required Origination and Disbursement Data Elements Added to COD Common Record Export** – We updated the COD Common Record (CRAA15IN) export process to include new Direct Loan origination and disbursement data elements required by the COD System for the 2014-2015 award year. This includes new fields displayed on the new Usage Limit Applies Info sub-tab of the Origination (Direct Loan) tab and the new CIP Code, Enrollment Status, and Payment Period Start Date values associated with each anticipated and actual disbursement on the Disburse (Direct Loan) tab.

Print, File Formats Setup, and Query

- **New SULA Information Report** – We added a new Direct Loan report called the SULA Information Report. This report prints new origination and disbursement fields we incorporated into the EDEExpress 2014-2015 Direct Loan module, including user-reported and COD-calculated field values related to the 150% Direct Subsidized Loan Limit.

The SULA Information Report can be printed for single or multiple students. Each report page is specific to a single subsidized, unsubsidized, PLUS, or Grad PLUS loan record and lists the student name and loan ID, followed by sections listing school-reported SULA information, COD-calculated SULA information, and disbursement SULA information (including the CIP Code, Enrollment Status, and Payment Period Start Date associated with each disbursement).

You can print the SULA Information Report by accessing the Direct Loan Print dialog box from the EDEExpress main menu (**File, Print, Direct Loan**) or from the Origination (Direct Loan) tab.

- **New Origination and Disbursement Fields Added to Origination Record Report** – We expanded the Origination Record report to include the new origination and disbursement data elements added in EDEExpress 2014-2015, Release 3.0. This includes new fields displayed on the new Usage Limit Applies Info sub-tab and the new CIP Code, Enrollment Status, and Payment Period Start Date values associated with each anticipated and actual disbursement on the Disburse tab.

You can print the Origination Record report from the Origination (Direct Loan) tab or by selecting **Tools, Print, Direct Loan** from the EDEExpress menu bar.

File Formats Setup and Query

- **New Origination and Disbursement Fields Added to File Formats Setup and Query** – New origination and disbursement data elements added in Release 3.0 are now available for selection in Direct Loan File Formats for external export files and as part of Direct Loan query statements. This includes new fields displayed on the new Usage Limit Applies Info sub-tab and the new CIP Code, Enrollment Status, and Payment Period Start Date associated with each anticipated and actual disbursement on the Disburse tab.

TEACH Grant

Note: Beginning with the 2014-2015 award year, EDExpress TEACH Grant module users must report the Enrollment Status and CIP Code values associated with each new TEACH Grant anticipated or actual disbursement record to the COD System. The enhancements we implemented in Release 3.0 to enable Enrollment Status and CIP Code reporting on TEACH Grant disbursement records are similar in design and function to the enhancements we added in the Direct Loan module in Release 3.0.

Import

- **CIP Code, Enrollment Status Fields Added to Origination Data–ISIRs Import** – We modified the TEACH Grant Import dialog box for the Origination Data–ISIRs import types to add optional CIP Code and Enrollment Status fields. If you enter or select CIP Code and Enrollment Status values for these fields, EDExpress presents a secondary dialog box after you initiate the import that enables you to adjust the CIP Code and Enrollment Status values for individual records being imported.

The CIP Code and Enrollment Status values you designate for the import are used to update the corresponding field values on the Origination (TEACH Grant) tab and on each anticipated disbursement record on the Disburse (TEACH Grant) tab.

Also, if you select the “Import Packaging Data?” checkbox in the Import dialog box, you now must provide the CIP Code and Enrollment Status values in addition to the disbursement profile code before you can select the “Include Records in the Next Document Submission?” checkbox to prepare the records for export to the COD System.

- **CIP Code Added to TEACH Grant External Add and Change Imports** – We modified the TEACH Grant External Data Add/Change record layout (TGED15OP) to include the new CIP Code field. Imported records now must contain values for both the Enrollment Status and CIP Code fields, in addition to the other required field values, before the records can be prepared for export to the COD System.

Note: To import external TEACH Grant data into Release 3.0, you must use the June 2014 version of the TEACH Grant external add/change record layout in the *2014-2015 COD Technical Reference, Volume III, Section 3: Combination System Record Layouts*. The technical reference is available for download from the FSAdownload Web site.

When importing external data, EDExpress uses the CIP Code and Enrollment Status field values in your file to update the corresponding fields on the Origination (TEACH Grant) tab and each anticipated disbursement record on the Disburse (TEACH Grant) tab.

Entry

- **CIP Code and Enrollment Status Updates to TEACH Grant Origination Tab** – To facilitate the reporting of the CIP Code on TEACH Grant disbursement records, we added a new CIP Code field to the Origination (TEACH Grant) tab. Also, the existing Enrollment Status field on the Origination tab, which was previously optional for TEACH Grant records, is now required (along with the CIP Code value) to prepare the origination record for export to the COD System.

You can add or update the CIP Code and Enrollment Status field values manually on the Origination tab or by using TEACH Grant Multiple Entry. You can also provide CIP Code and Enrollment Status values when using the Origination Data–ISIRs or external add/change import options.

The CIP Code and Enrollment Status values provided on the Origination tab are used automatically for all anticipated and actual disbursement records on the Disburse (TEACH Grant) tab. To change the CIP Code or Enrollment Status value on individual disbursement records on the Disburse tab, you must first change and save the corresponding value on the Origination tab; the new CIP Code or Enrollment Status value is then used automatically when adding or adjusting disbursement records on the Disburse tab.

- **CIP Code and Enrollment Status Fields Added to Disburse (TEACH Grant) Tab Grid** – We added new display-only CIP Code and Enrollment Status fields to the Disburse (TEACH Grant) tab grid. The CIP Code and Enrollment Status values displayed in the Disburse tab grid for each disbursement match the values saved for the corresponding fields on the Origination (TEACH Grant) tab at the time the anticipated or actual disbursement transaction (or sequence number, in the case of actual disbursement adjustments) was created.

To update the CIP Code or Enrollment Status associated with an anticipated or actual TEACH Grant disbursement, you must first modify and save the corresponding field value on the Origination tab. Updating the CIP Code or Enrollment Status value on the Origination tab affects existing disbursement records as follows:

- **For anticipated disbursement records:** When you save the updated CIP Code or Enrollment Status on the Origination tab, all anticipated disbursements are updated automatically with the new value, provided they are not batched for processing (Disbursement Status of B). If you want to adjust the CIP Code or Enrollment Status value on a batched anticipated disbursement record, you must wait until after you have imported the processed response file from the COD System for the anticipated disbursement you submitted previously, which updates the record's disbursement status to a value other than B.
 - **For actual disbursement records:** Changing the CIP Code or Enrollment Status on the Origination tab does not modify the corresponding field value on existing actual disbursement (Disbursement Release Indicator [DRI] set to True) records or processed adjustments to actual disbursements (i.e., sequence numbers greater than 01); for tracking purposes, the CIP Code and Enrollment Status on these disbursement transactions remains set to the value you submitted when the DRI was first selected or the disbursement was adjusted. However, if you add a new sequence number on the Disburse tab to adjust an existing actual disbursement after changing the CIP Code or Enrollment Status value on the Origination tab, the new disbursement sequence number uses the updated CIP Code or Enrollment Status value.
- **CIP Code Added to TEACH Grant Multiple Entry** – We added the new CIP Code field to TEACH Grant Multiple Entry (**Process, Multiple Entry, TEACH**). Use this field to update the CIP Code field on the Origination (TEACH Grant) tab for multiple student records at once.

When you update the CIP Code using Multiple Entry, all anticipated disbursements are updated automatically with the new CIP Code value, provided they are not batched for processing (Disbursement Status of **B**). Also, selecting and updating the CIP Code field when updating an accepted actual disbursement using Multiple Entry changes the CIP Code associated with the new sequence number.

Note: You can also update Enrollment Status values for your TEACH Grant records using multiple entry. Modifying Enrollment Status values using Multiple Entry results in the same updates to both origination and disbursement records as selecting and updating CIP Code values using Multiple Entry.

Export

- **New Required Origination and Disbursement Data Elements Added to COD Common Record Export** – We updated the COD Common Record (CRAA15IN) export process to include the new CIP Code and Enrollment Status values required by the COD System for the 2014-2015 award year for each TEACH Grant anticipated and actual disbursement.

Print, File Formats Setup, and Query

- **CIP Code Added to Origination Record Report and List-Actual Disbursements** – We expanded the TEACH Grant Origination Record and List–Actual Disbursements reports to include the new CIP Code field value associated with the origination and disbursement.
- **CIP Code Added to TEACH Grant File Formats Setup and Query** – You can now select the CIP Code and Enrollment Status field values associated with both the TEACH Grant Origination tab and individual disbursement records as part of File Formats for external export files and as part of TEACH Grant query statements.

How to Get EDEExpress and Documentation

You can download each EDEExpress release and related user documentation from the U.S. Department of Education’s Federal Student Aid Download (FSAdownload) Web site, located at fsadownload.ed.gov.

EDEExpress Software

Instructions for downloading EDEExpress are located in the “Downloading Documentation and Software from the FSAdownload Web Site” section of the [2014-2015 Installation Guide for EDEExpress for Windows](#).

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

User Documentation

In conjunction with the posting of EDEExpress 2014-2015, Release 3.0, we updated the [EDEExpress for Windows 2014-2015, Release 1.0 Desk Reference](#) and the [EDEExpress for Windows 2014-2015, Release 2.0 Desk Reference](#) to incorporate guidance regarding EDEExpress 2014-2015, Release 3.0 enhancements.

If you use the EDEExpress 2014-2015 Direct Loan or TEACH Grant modules in combination with an external mainframe or third-party system, you should also download the June 2014 version of the *2014-2015 COD Technical Reference, Volume III (Combination System Supplement)*. The technical reference is available under the “Technical References and Guides” link from the FSAdownload home page.

Compatibility and Compliance

Microsoft Windows 7, Windows Vista, and Windows 8 Information

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

- In 2012, we tested Microsoft Windows 7 as an operating system during the development of the 2012-2013 versions of our EDESuite PC software. Our test results indicated that schools should be able to proceed with use of Windows 7 without encountering any major issues, largely due to enhancements we implemented previously for the Windows Vista operating system. For more information on our Windows 7 testing, see the [August 8, 2012 electronic announcement](#) posted to the IFAP Web site.
- In 2008, we tested Microsoft Windows Vista as an operating system for our EDESuite PC products. We communicated our original Vista testing results, issues we discovered, and steps schools needed to take in order to run EDEExpress on Vista operating systems in the [September 18, 2008 electronic announcement](#) posted on the IFAP Web site. The vast majority of Windows Vista issues discussed in the announcement have been resolved, most recently in our 2012-2013 PC software releases.

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

Section 508 Compliance

To comply with Section 508 of the Rehabilitation Act, all EDESuite PC products are compatible with screen reader technology used by the visually impaired. Screen reader software cannot interpret color shading in EDESuite software entry fields or directly read the contents of software grid cells. To accommodate these restrictions, EDESuite software includes the following features:

- All software fields that are shaded yellow to indicate they are required also display a “-R” after the software label. The “-R” indicates the field is required.
- All software fields that are shaded blue after a previously saved value has been modified also display a “-C” after the software label. The “-C” text indicates the field has been changed.
- All software grids display “floating” text descriptions of the contents of grid cells when cells are selected. The text appears one cell above (or below, if the first cell is selected) the selected cell. The text lists Row number, Column title, and (if applicable) the current Value.

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

Getting Help

If You Have Technical Support Questions

If you have questions regarding EDEExpress installation or functionality, have trouble accessing the FSAdownload Web site, or require other technical assistance, contact CPS/SAIG Technical Support.

You can reach CPS/SAIG Technical Support Monday through Friday, 8 a.m. – 8 p.m. (ET), at **800/330-5947 (TDD/TTY 800/511-5806)**. You can also send e-mail inquiries, comments, or suggestions to CPSSAIG@ed.gov. A representative will respond within one business day.

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

If You Have Questions Regarding the COD System

If you have any questions about the COD System, contact the COD School Relations Center at 800/474-7268 for Grants or 800/848-0978 for Direct Loans. You may also e-mail CODSupport@ed.gov.