

January 2015

RE: EDEExpress for Windows 2015-2016, Release 1.0

Dear EDEExpress Users:

Federal Student Aid is pleased to announce the availability of EDEExpress for Windows 2015-2016, Release 1.0. Release 1.0 is the initial EDEExpress software release for the 2015-2016 award cycle and includes the Application Processing and Packaging modules, as well as Global functionality such as Security setup, Document Tracking, and User Database.

About this Cover Letter

This letter includes the following information:

- Overview of EDEExpress 2015-2016, Release 1.0
- A list of 2015-2016 enhancements available in Release 1.0
- Enrollment instructions for FAA Access to CPS Online
- Release 1.0 software and user documentation download instructions
- Microsoft Windows compatibility and Section 508 compliance notices
- Contact information for technical support and additional assistance

Important Note for Packaging Users: See the note under the Packaging section later in this letter for important information regarding the Federal Pell Grant (Pell Grant) award limits in the EDEExpress 2015-2016 Release 1.0 Packaging module.

EDEExpress 2015-2016, Release 1.0

EDEExpress for Windows 2015-2016, Release 1.0 consists of two software modules:

- Application Processing
- Packaging

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

Note: EDEExpress 2015-2016, Release 1.0 uses National Center for Education Statistics (NCES) data associated with your OPE ID to update sections of the Financial Aid Shopping Sheet document. The NCES data in Release 1.0 was most recently updated in June 2014. If necessary, we will update the NCES information used by EDEExpress 2015-2016 in a future release.

Release 1.0 does not overwrite your EDEExpress 2014-2015 database; instead, it creates a new database specific to 2015-2016 data. You can pull forward certain EDEExpress 2014-2015 data elements for use in 2015-2016, including setup parameters, student demographic data, and user-defined data fields, using the Prior Year Import feature.

Release 1.0 Enhancements

The following product enhancements have been incorporated into EDEExpress 2015-2016, Release 1.0.

General

- **Updated Cycle References and Message Classes** – We updated software labels, help system topics, reports, and other functionality throughout EDEExpress to reference the 2015-2016 cycle. Message classes with cycle indicators are also updated for 2015-2016 in File Management (**Tools, Setup, Global, File Management**) and in various Import and Export dialog boxes throughout EDEExpress.

Note: For more information regarding message classes used by the CPS in 2015-2016, see the Processing Codes section of the *2015-2016 Electronic Data Exchange (EDE) Technical Reference*, available from the U.S. Department of Education’s Federal Student Aid Download (FSADownload) Web site located at fsadownload.ed.gov.

- **Updated EDEExpress Icon and Splash Screen Color to Match 2015-2016 FAFSA** – The EDEExpress software’s Windows icon and splash screen (which is displayed when you first start the software) have been color-coded yellow to match the 2015-2016 Free Application for Federal Student Aid (FAFSA[®]) form.

Global

The following Global enhancements are available in EDEExpress 2015-2016:

- **New Enrollment Status Field Added for Application Processing Version of FISAP Reports** – We added a new Enrollment Status field to the Demo tab. The value you provide in this field is used exclusively for the FISAP–Dependent Student Summary, FISAP–Independent Student Summary, FISAP–Eligible Dependent Students, and FISAP–Eligible Independent Students reports, which you can now print from the App Express print dialog box. For more information, see “FISAP Reports” in the Application Processing section below.

Valid values are **1** (Full time), **2** (3/4 time), **3** (1/2 time), **4** (Less than 1/2 time), or blank. The field defaults to **1** (Full time) for new records created manually. You can modify the field value manually, by using Global Multiple Entry (**Process, Multiple Entry, Global**), or by importing external demographic data.

- **Ability to Benefit Code Relabeled as Student Eligibility Code** – We relabeled the Ability to Benefit Code field located on the Demo tab to Student Eligibility Code. This new label more accurately describes the use and purpose of this field, which is required to finalize Pell Grant, Direct Loan, and TEACH Grant origination records for export and processing by the COD System. The COD System also renamed this field to Student Eligibility Code in the 2015-2016 Common Record schema.

We also updated other EDEExpress Global functions to display the new Student Eligibility Code field label, including prior year import, Multiple Entry, Query, Browse, File Formats setup, and the List Changes and Demo Tab report options available from the Demo tab.

Application Processing

The following enhancements are available in the EDEExpress 2015-2016 Application Processing module:

ISIR Import

- **Modification to ISIR Import Updates to Student Eligibility Code Field** – Currently, the ISIR import process in EDEExpress updates the Student Eligibility Code field, if blank, on the Demo tab based on specific student responses to the “High School Diploma or Equivalent Received?” question on the FAFSA. EDEExpress translates the resulting HS Diploma or Equivalent field value to the corresponding Student Eligibility Code value on the Demo tab during the ISIR import process.

For 2015-2016, we modified this translation process to set the Student Eligibility Code field to blank when the HS Diploma or Equivalent value is **2** (GED/State Equivalent Test). This change was necessary because there are now two separate Student Eligibility Code field values in the COD System indicating whether the student received a GED certificate or a state-authorized high school equivalent certificate, whereas the 2015-2016 ISIR’s High School Completion value of **2** covers both scenarios.

The ISIR import process continues to convert the HS Diploma or Equivalent value of **1** (High School Diploma) to the Student Eligibility Code of **06** (High School Diploma) and the HS Diploma or Equivalent value of **3** (Home Schooled) to the Student Eligibility Code of **04** (Home Schooled).

Note: See the *2015-2016 Common Origination and Disbursement (COD) Technical Reference*, Volume II, Section 1, for the valid Student Eligibility Code values you should use for the Demo tab field in EDEExpress 2015-2016.

ISIR View, Print, File Format, and Query

- **ACG and National SMART Grant Fields Removed from ISIR Functions** – We removed all fields related to the Academic Competitiveness Grant (ACG) and National Science and Mathematics Access to Retain Talent Grant (National SMART Grant) from ISIR-related functions and features in the Application Processing module, such as ISIR import, the ISIR Review tab, and the ISIR report. Both grant programs ended after the 2010-2011 award year.
- **New and Modified ISIR Fields Available** – New and modified data elements on the 2015-2016 ISIR are printed on the EDEExpress ISIR report, appear on the ISIR Review tab and Apps Browse grid, and are available for selection in App Express File Format and Query setup.

Note: See the *2015-2016 ISIR Guide*, available on the FSAdownload Web site, for more detailed information on changes to the ISIR for 2015-2016.

NSLDS View and Print

- **New and Relabeled NSLDS Fields for Subsidized Loan Limit Information** – We added two new fields to the Loan Detail tab of the NSLDS Financial Aid History dialog box (**View, NSLDS**): Confirmed Loan Subsidy Status and Subsidy Status Date. The Confirmed Loan Subsidy Status field indicates the current status of the interest subsidy for a loan record. The Subsidy Status Date is the date the status of the loan’s interest subsidy was confirmed.

We also relabeled the existing Subsidized Loan Eligibility Used field from NSLDS to Subsidized Usage Period.

- **New NSLDS Postscreening Codes Added** – We added two NSLDS Postscreening Reason Codes to the 2015-2016 ISIR related to the 150% Direct Subsidized Loan Limit. The new codes are 26 (Confirmed loan subsidy status change) and 27 (Decrease in subsidized usage period).

You can view the NSLDS Postscreening Reason Code within a student’s record by selecting **View, NSLDS**. The code also prints on the ISIR and NSLDS reports (**File, Print, App Express**).

- **ACG and National SMART Grant Fields Removed from NSLDS Functions** – We removed all fields related to the ACG and National SMART Grant from NSLDS-related features and functions in the Application Processing module, such as the NSLDS Financial Aid History dialog box and the NSLDS report. As noted earlier, both grant programs ended after the 2010-2011 award year.
- **Additional Updated NSLDS Field Values Available** – Updated NSLDS data values are included in the ISIR record, can be viewed in EDEXpress from a student’s record (**View, NSLDS**), and can be printed on the NSLDS report (**File, Print, App Express, NSLDS**).

Note: See the *2015-2016 Summary of Changes for the Application Processing System* guide, available on the FSADownload Web site, for more detailed information on changes to NSLDS information for 2015-2016.

FISAP Print

- **FISAP Reports Added to App Express Module** – We added the FISAP–Dependent Student Summary, FISAP–Independent Student Summary, FISAP–Eligible Dependent Students, and FISAP–Eligible Independent Students reports to the App Express print dialog box (**File, Print, App Express**). These EDEXpress FISAP reports were previously only available to Packaging users. This enhancement enables both EDEXpress Packaging and non-Packaging users to take advantage of these reports.

When generating the App Express FISAP reports, EDEXpress uses the new Enrollment Status field value from the Demo tab in combination with FISAP-related data from the ISIR flagged as the active transaction on the ISIR Review tab. See “How Do I...Print FISAP Reports using App Express Module” in EDEXpress Help for guidance on preparing your student data.

Note: You can also continue to use the existing Packaging versions of the four EDEExpress FISAP reports. You must first establish a basic Packaging setup, then import all valid ISIR data into Packaging. See "How Do I...Set Up Packaging to Print FISAP Reports" in EDEExpress Help for guidance on creating the necessary Packaging setup, importing ISIR data into the Packaging module, and printing the reports.

Packaging

While no major changes have been made to the EDEExpress Packaging module for 2015-2016, note the following considerations when using Release 1.0:

Federal Pell Grant Award Limits in Release 1.0 Packaging

At this time, the U.S. Department of Education's (ED's) Fiscal Year 2015 Appropriation has not been approved. Therefore, the Federal Pell Grant Payment and Disbursement Schedule used by the Release 1.0 Packaging module is based on the 2014-2015 Pell Grant payment and disbursement schedules in [Dear Colleague Letter GEN-14-01](#), posted on January 31, 2014 to the Information for Financial Aid Professionals ([IFAP](#)) Web site.

After ED's Fiscal Year 2015 Appropriation is finalized, we will update the Pell Grant Payment Schedule, if necessary, through a future release of EDEExpress. If you use the EDEExpress Packaging module to award Pell Grants, you may want to wait until it is known if the Pell Payment Schedule changes.

Discontinuation of Subsidized Loan Eligibility for Graduate/Professional Students

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

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

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

Enrollment for FAA Access to CPS Online

To ensure your school can take full advantage of the EDEExpress 2015-2016 interface with the FAA Access to CPS Online Web site, the Primary Destination Point Administrator (DPA) of the TG number used to send and receive FAFSA and ISIR correction data should verify your enrollment status.

- If your school is enrolled for 2014-2015, your enrollment status rolls over to 2015-2016.

- Your school’s Primary DPA must actively confirm the FAA Access to CPS Online services and users associated with your school’s TG number on a periodic basis. Monitor the IFAP Web site and e-mail notifications you may receive from Federal Student Aid for announcements on when you need to confirm services and users on behalf of your school.
- If your school is not enrolled, your school’s Primary DPA can complete the enrollment for FAA Access to CPS Online site services for your school, including access to R2T4 on the Web and the ISIR Analysis Tool, through the Student Aid Internet Gateway (SAIG) Enrollment Web site, located at fsawebenroll.ed.gov.
- An SAIG-FAA User Statement must be printed by the Primary DPA and signed by new users of the FAA Access to CPS Online, R2T4 on the Web, or ISIR Analysis Tool Web sites. While you do not mail SAIG-FAA User Statements to Federal Student Aid’s Participation Management system, you must retain signed copies at your school.

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

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

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

How to Get EDEExpress and Documentation

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

EDEExpress Software

Instructions for downloading EDEExpress are located in the “Downloading Documentation and Software from the FSAdownload Web Site” section of the *Installation Guide for EDEExpress for Windows 2015-2016*.

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

User Documentation

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

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

The 2015-2016 versions of the *EDE Technical Reference* and the *EDEExpress Packaging Technical Reference* provide technical guidance and record layouts for schools or other organizations that need to interface local software or mainframe systems with EDEExpress 2015-2016. The *EDEExpress Packaging Technical Reference* also contains worksheets you can use to help plan and implement your Packaging module setup in EDEExpress 2015-2016.

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 and DL Tools), 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 2015-2016.

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.

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.