

April 2015

**RE: EDEExpress for Windows 2015-2016, Release 2.0**

Dear EDEExpress Users:

Federal Student Aid is pleased to announce the availability of EDEExpress for Windows 2015-2016, Release 2.0. Release 2.0 adds Federal Pell Grant (Pell Grant), William D. Ford Federal Direct Loan (Direct Loan), and Teacher Education Assistance for College and Higher Education (TEACH) Grant functionality for the 2015-2016 award cycle.

## **About this Cover Letter**

This letter includes the following information:

- An overview of EDEExpress 2015-2016, Release 2.0
- Important notices regarding:
  - Product Registration feature in Release 2.0
  - Updates to credit-related functionality for Direct PLUS and Grad PLUS loans
  - Pell Grant payment and disbursement schedules in Release 2.0
  - Use of Additional Eligibility Indicator in Pell Grant module
- A list of 2015-2016 enhancements available in Release 2.0
- 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

EDEExpress users send and receive Pell Grant, TEACH Grant, and Direct Loan origination and disbursement data to and from the Common Origination and Disbursement (COD) System using the Common Record's eXtensible Markup Language (XML) format. The software converts the data to XML format automatically during the export process and can import files returned from the COD System in XML format.

For information regarding the availability of the 2015-2016 COD System, see the [March 20, 2015 electronic announcement](#) posted to Federal Student Aid's Information for Financial Aid Professionals (IFAP) Web site located at [ifap.ed.gov](http://ifap.ed.gov).

**Important Note:** Under certain limited circumstances, such as awarding the maximum full-time Pell Grant award to individuals whose parent or guardian died as a result of military service in Iraq or Afghanistan after September 11, 2001, you must use the COD Web site ([cod.ed.gov](http://cod.ed.gov)) to originate the award. Otherwise, if you plan to use EDEExpress to exchange data with the COD System, we recommend you do not originate Pell Grant, TEACH Grant, or Direct Loan records on the COD Web site unless directed to do so by Federal Student Aid.

## EExpress for Windows 2015-2016, Release 2.0 Overview

EExpress 2015-2016, Release 2.0 adds three software modules:

- Pell Grant
- Direct Loan
- TEACH Grant

In addition, Global functionality applicable to all modules, such as Security setup, Document Tracking setup, and User Database setup and entry is added during any installation of EExpress.

EExpress 2015-2016, Release 2.0 can be installed as an upgrade to Release 1.0 (posted in January 2015). You must have Release 1.0 installed to run an upgrade (or “custom”) installation of Release 2.0.

**Reminder:** Before upgrading to Release 2.0, ensure you have a reliable backup copy of your current EExpress 2015-2016 production database (**expres16.mdb**).

To upgrade to Release 2.0, select the Stand Alone Custom or Workstation Custom option during installation, depending on your EExpress operating environment.

If you have not previously installed EExpress 2015-2016, you can proceed directly to a Stand Alone Full or Network Server/Workstation Full installation of Release 2.0. Be aware, however, that a Stand Alone Full or Network Server/Workstation Full installation loads a new, blank EExpress 2015-2016 database to your system. If you have an existing 2015-2016 database, a Stand Alone Full or a Network Server/Workstation Full installation of Release 2.0 will overwrite your database and all previously entered 2015-2016 data will be lost.

For more technical guidance and information regarding the EExpress installation process, see the [Installation Guide for EExpress for Windows 2015-2016](#), which is available for download from the U.S. Department of Education’s Federal Student Aid Download (FSAdownload) Web site at [fsadownload.ed.gov](http://fsadownload.ed.gov).

## Product Registration

EExpress 2015-2016, Release 2.0 implements a limited-time product registration feature intended to gather more information about how your school or organization uses EExpress to assist with future planning and enhancements.

The product registration feature will initiate after you install Release 2.0, log into the software, and run the database update process. You will continue to be prompted to complete the product registration process each time you access Release 2.0 prior to September 16, 2015 until you submit a response. EExpress automatically removes the product registration prompt if your PC’s system date is on or after September 16, 2015.

**Note:** The second page of the product registration process includes an option to temporarily bypass entry and submission of your responses. This option is only applicable to your current session of EExpress.

The product registration process contains several different questions about the EExpress modules and specific functionality you currently use; it also gathers some background information about your organization to better understand your needs as a user.

An interactive summary report is displayed at the end of the product registration process, prior to the final submission step. You can click sections of the report to return to specific questions and revise your answers. At the successful conclusion of the product registration process, your responses are automatically transmitted to Federal Student Aid using your PC's default e-mail client.

**Note:** If you are a multi-campus school using a shared EExpress database, we recommend that your main campus submit the product registration response on behalf of all your campuses to avoid duplicate or conflicting feedback. Likewise, if you use a networked EExpress database that is shared by multiple PC workstations at a single location, we recommend that your school's EExpress lead submit the response.

## **Updates to Credit-Related Functionality for Direct PLUS and Grad PLUS Loans**

Earlier this spring, the COD System replaced the Direct Loan Credit Decision Override Response (message class CRCOYYOP) file with the Credit Status Response (CRCSYYOP). The Credit Status Response is a new system-generated file with credit-related status and date fields that can help you determine if PLUS and Grad PLUS borrowers have completed all necessary credit requirements to receive actual disbursements for the loan, including borrowers with adverse credit decisions who must either obtain an approved endorser or successfully appeal the decision by documenting extenuating circumstances. The Credit Status Response also indicates whether PLUS or Grad PLUS borrowers have completed the new PLUS counseling process on Federal Student Aid's Student Loans Web site ([StudentLoans.gov](http://StudentLoans.gov)).

EExpress 2015-2016, Release 2.0, enables you to import and review data provided in Credit Status Response files for your PLUS and Grad PLUS loan records. We also redesigned the Credit/PLUS App Info sub-tab of the Origination (Direct Loan) tab to display new credit-specific field values sent in Credit Status Response files in combination with related existing field values provided in PLUS Application Acknowledgement (CRSP16OP) files.

For more information on related EExpress 2015-2016 updates, see the Direct Loan sub-section of "Release 2.0 Enhancements" later in this cover letter. You can also find more information about the Credit Status Response file and changes to credit-related processing for PLUS and Grad PLUS loans in the COD System in Volume II of the *2015-2016 COD Technical Reference*, which is available for download from the FSAdownload Web site.

**Note:** In April 2015, we posted a service release for EExpress 2014-2015, Release 3.0 that enables you to generate and print an import edit report regarding the data sent in Credit Status Response files for the 2014-2015 award year. See the late April 2015 electronic announcement on the IFAP Web site for more information on the service release enhancements.

## Federal Pell Grant Payment and Disbursement Schedules in EDEXpress 2015-2016, Release 2.0

Federal Student Aid announced the 2015-2016 Pell Grant Payment and Disbursement schedules in [Dear Colleague Letter GEN-15-02](#), posted on January 29, 2015 to the IFAP Web site.

As noted in the Dear Colleague Letter, the maximum 2015-2016 Pell Grant award for a full-time student with an Expected Family Contribution (EFC) of zero is \$5,775, an increase of \$45 over the 2014-2015 maximum of \$5,730. The maximum Pell-eligible EFC is also increased for 2015-2016 from the 2014-2015 maximum of 5157 to 5198. As a result of the EFC increase, some applicants who were initially processed by the CPS as ineligible for a 2015-2016 Pell Grant award due to their EFC are now Pell-eligible.

The Central Processing System (CPS) began processing 2015-2016 application and correction records according to the updated Pell Grant Payment and Disbursement schedules on March 29, 2015. The CPS also reprocessed 2015-2016 Institutional Student Information Records (ISIRs) on April 1, 2015 for students who applied before March 29 and, under earlier formulas, were designated as not being Pell-eligible, but who are now eligible for a 2015-2016 Pell Grant under the new formulas due to their EFC.

For more information and a complete description of the changes for the 2015-2016 Award Year, see Dear Colleague Letter GEN-15-02 and the [March 6, 2015 electronic announcement](#) posted to the IFAP Web site.

EDEXpress 2015-2016, Release 2.0 incorporates the 2015-2016 Pell payment and disbursement schedules into EDEXpress in the following functionality (listed by module):

### Global

We updated the Pell Grant Regular Schedule tab available under **Tools, Browse, Global** to reflect the 2015-2016 Pell Grant payment and disbursement schedules.

### Packaging

We updated the Package and Repackage processes to award Pell Grants (Packaging Aid Type = **F**) according to the 2015-2016 Pell Grant payment and disbursement schedules.

If you create Packaging records by importing ISIR data, you should import any new ISIR transactions you received for student records impacted by the April 1, 2015 reprocessing into the Packaging module. This helps ensure the Pell Eligibility field on the Packaging record is set correctly. You must unpackage existing Packaging records at a Packaging Status of **P** (Packaged), **M** (Manually Adjusted), or **H** (Hand Packaged) before you can import new ISIR transactions. Before un packaging these records, you may want to print the Packaging Record report for each student so you have a record of the funds you originally awarded to them (in case you need to recreate the awards).

After you import all reprocessed ISIR data into the Release 2.0 Packaging module, run the Repackage process for all Pell-eligible Packaging records, unless you already adjusted Pell Grant awards on these records prior to installing Release 2.0 to match the scheduled award amounts in Dear Colleague Letter GEN-15-02. The Repackage process will update the Pell Grant awards for your Packaging records to follow the 2015-2016 Pell Grant payment and disbursement schedules.

## Pell Grant

We updated the Pell module's Calculate Award Amount for Entire School Year function, available on the Process menu from the EDEExpress main menu and the Origination (Pell Grant) tab, to follow the 2015-2016 Pell Grant payment and disbursement schedules.

## Use of Additional Eligibility Indicator in Pell Grant Module

The Department of Defense and Full-Year Continuing Appropriations Act, 2011 (Public Law 112-10) discontinued the authorization for schools to award up to 200% of a student's scheduled Pell Grant award in a single award year. The Common Origination and Disbursement (COD) System was updated in May 2011 to only accept up to 100% of the scheduled award for the 2011-2012 Award Year and forward, and will continue to correct or reject any submission of Additional Eligibility Indicator equal to "True" (or "selected").

EDEExpress 2015-2016, Release 2.0 continues to include the Additional Eligibility Indicator field in various Pell Grant module functions, such as origination entry and query. However, due to the discontinuation of the "two Pell Grants in one award year" provision and the resulting updates to the COD System, you should *not* select the Additional Eligibility Indicator for any 2015-2016 Pell Grant records you create in EDEExpress.

For more information on the COD System updates related to this change, see [Dear Colleague Letter P-11-02](#), posted on April 27, 2011 to the IFAP Web site.

## Release 2.0 Enhancements

The following product enhancements have been incorporated into EDEExpress 2015-2016, Release 2.0.

**Note:** Some enhancements listed below were originally made available to users in Release 1.0. We are repeating the enhancements here for the benefit of users installing EDEExpress 2015-2016 for the first time. For more information on the 2015-2016 enhancements to Application Processing, Packaging, and Global functionality introduced in Release 1.0, see the [EDEExpress for Windows 2015-2016, Release 1.0 Cover Letter](#), available on the FSAdownload Web site.

### General Changes

- **Updated Cycle References and Message Classes** – We updated software labels, help 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](#). For more information regarding message classes used by the COD System in 2015-2016, see Volume III, Section 2 of the [2015-2016 COD Technical Reference](#). Both documents are available on the FSAdownload Web site.

- **Updated EDEExpress Icon and Splash Screen Color to Match 2015-2016 FAFSA** – The EDEExpress software’s Windows icon and splash screen (displayed when you start the software) are now colored yellow to match the 2015-2016 Free Application for Federal Student Aid (FAFSA®) form.

## Global

The following Global enhancements are available in Release 2.0:

- **CIP Codes and Program Profiles Setup Added to Prior Year Import** – You can now import CIP Codes setup and Program Profiles setup parameters from the prior year’s EDEExpress database using the Prior Year User-Defined Queries, Setup, and File Formats import type (**File, Import, Global**).
- **Payment Period Start Dates Added to Prior Year Import for Disbursement Profiles** – If you import a disbursement profile code marked for use with the Direct Loan module from your prior year database into EDEExpress 2015-2016, the PP (Payment Period) Start Date associated with each disbursement date is now pulled forward as part of the disbursement profile in EDEExpress 2015-2016.
- **Ability to Benefit Code Relabeled as Student Eligibility Code on Demo Tab** – 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 establish the student’s eligibility reason before a Direct Loan, Pell Grant, or TEACH Grant record can be saved or originated in EDEExpress. This field is also relabeled as Student Eligibility Code in the COD System schema for the 2015-2016 award year.

The student’s Title IV eligibility reason continues to be a required data element on all Direct Loan, Pell Grant, and TEACH Grant records submitted to the COD System for students enrolling in a program of study on or after July 1, 2012. This eligibility information must indicate whether the student received a high school diploma, a GED certificate or the equivalent, or was home-schooled.

For a list of valid codes, see the latest version of Volume II of the *2015-2016 Common Origination and Disbursement (COD) Technical Reference*, which is available for download from the FSAdownload Web site.

- **Pell Regular Schedule Tab Updated in Browse** – We updated the Pell Grant Regular Schedule tab available under **Tools, Browse, Global** to reflect the 2015-2016 Pell Grant payment and disbursement schedules in Dear Colleague Letter GEN-15-02, posted on January 29, 2015 to the IFAP Web site.

## Packaging

The following enhancement is available in the Packaging module in Release 2.0:

- **Package/Repackage Processes Updated to Follow 2015-2016 Pell Grant Payment and Disbursement Schedules** – We updated the Package and Repackage processes to award Pell Grants (Packaging Aid Type = F) according to the 2015-2016 Pell Grant payment and disbursement schedules in [Dear Colleague Letter GEN-15-02](#), posted on January 29, 2015 to the IFAP Web site.

## Pell Grant, TEACH Grant, and Direct Loan Valid Date Ranges

We updated valid date ranges for the 2015-2016 processing cycle to synchronize EDEXpress 2015-2016 with the COD System edits and federal policy. The following valid date ranges are active in Release 2.0.

Field	Valid Date Range
Pell Grant Enrollment Date	1/1/2015 to 6/30/2016
Pell Grant Payment Period Start Date	1/1/2015 to 6/30/2016
Pell Grant Disbursement Date*	1/1/2015 to 9/30/2021*
TEACH Grant Enrollment Date and Disbursement Date	On or after 1/1/2015
Direct Loan Date of Birth	1/1/1916 to 12/31/2007
Direct Loan Loan Period Begin Date	On or before 6/30/2016
Direct Loan Loan Period End Date	On or after 7/1/2015
Direct Loan Academic Year Start Date	On or before 6/30/2016
Direct Loan Academic Year End Date	On or after 7/1/2015
Direct Loan Disbursement Date (all loan types)	6/21/2012 to 12/28/2019

\* Although EDEXpress accepts any date on or after 1/1/2015, the valid 2015-2016 date range for Pell Grant disbursement records is from the date the 2015-2016 Pell schedules are posted on the IFAP Web site to 9/30/2021.

## COD Setup Enhancement

The following enhancement is available in COD Setup (**Tools, Setup, COD**) in Release 2.0:

- **CIP Code Description Field Length Expanded** – We expanded the length of the Description field on the CIP Code setup dialog box (**Tools, Setup, COD, CIP Codes**) to 255 characters, enabling you to provide more descriptive text for each CIP Code you add. The Description text appears in multiple locations in the Pell Grant, Direct Loan, and TEACH Grant modules when selecting a CIP Code value, including each module's Origination tab and import dialog box.

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 for all anticipated and actual Direct Loan disbursements for all loan types and for all anticipated and actual TEACH Grant disbursement records. The CIP Code continues to be optional for Pell Grant records in EDEExpress 2015-2016 and is not required or processed by the COD System for Pell Grant records for the 2015-2016 award year.

## **Pell Grant Enhancement**

The following enhancement is available in the Pell Grant module in Release 2.0:

- **Award Calculation Process Updated to Follow 2015-2016 Pell Grant Payment and Disbursement Schedules** – We updated the Pell Grant module's Calculate Award Amount for Entire School Year function, available on the Process menu from the EDEExpress main menu and the Origination (Pell Grant) tab, to follow the 2015-2016 Pell Grant payment and disbursement schedules in Dear Colleague Letter GEN-15-02, posted on January 29, 2015 to the IFAP Web site.

## **Direct Loan Enhancements**

The following enhancements are available in the Direct Loan module in Release 2.0:

### ***Import***

- **New Credit Status Response (CRCS16OP) Added to Common Record Import** – We modified the COD Common Record Response import type to include the new Credit Status Response message class (message class CRCS16OP). The Credit Status Response file replaces the Credit Decision Override Response (CRCOYYOP) file sent for PLUS and Grad PLUS loans in previous award years.

During the import of a Credit Status Response file, EDEExpress updates the Credit/PLUS App Info sub-tab of the Origination (Direct Loan) tab for matching PLUS and Grad PLUS records in your database with the data in the file. The import edit report generated at the conclusion of the import lists the PLUS and Grad PLUS records updated by new credit-related information from the COD System.

- **Response Import Now Updates Borrower-Level Subsidized Usage Info Across All Loans** – We modified the COD Common Record Response import process to update all Direct Loan records for each student in a response file with the most recent Subsidized Usage Limit Applies (SULA), Sum Actual Subsidized Usage Periods, and Sum Actual Non Cred Teacher Cert Sub Usage Periods field values in the response file. These three field values are displayed on the Usage Limit Applies Info sub-tab of the Origination tab.

Maintaining this subsidized usage information across loan records enables you to review the most current eligibility information more quickly for students with multiple loans of different types in EDEExpress.

## **Entry**

- **Existing Subsidized Usage Information Now Copied to New Loans** – When creating a new loan record manually (by selecting **Record, Add** or clicking the + button on the toolbar) on the Origination tab for students with existing loan records, EDEExpress now copies field values on the Usage Limit Applies Info sub-tab of the existing loan record to the new loan record. This new process also applies if you choose to copy loan information from an existing subsidized or unsubsidized loan to a new loan record if prompted during the origination process.

To qualify for the copy process, an existing loan record must have at least one of the following school-reported fields with a non-blank value saved on the Usage Limit Applies Info sub-tab: Published Program Length (must be greater than 0), Special Programs, Program Credential Level, Weeks Program Academic Year (must be greater than or equal to 26), or CIP Code.

If a qualifying existing loan record is identified, the copy process pulls the following Usage Limit Applies Info sub-tab fields forward to the new loan: Published Program Length (including Units), Special Programs, Program Credential Level, Weeks Program Academic Year (if greater than/equal to 26), Enrollment Status, CIP Code, and Subsidized Usage Limit Applies.

**Note:** If a record exists with an Origination Status of **A** (Accepted by COD) or **B** (Batched to send to COD), it takes precedence over records with other Origination Status values as the source of the copied data. If multiple loan records exist for the student that qualify for copying data, EDEExpress copies all of the school-reported subsidized usage information from the record with the most recent update date and time to the new loan record. If multiple loan records exist that have the same update date and time, EDEExpress copies the school-reported subsidized usage information from the loan record with the highest loan ID sequence number, sorted alphabetically in loan type order (i.e., Grad PLUS, PLUS, subsidized, unsubsidized).

- **Credit/PLUS App Info Sub-Tab Redesigned for Credit Status Response Files** – We redesigned the Credit/PLUS App Info sub-tab of the Origination tab to incorporate data fields sent by the COD System in the new Credit Status Response (CRCS16OP) file. All credit-related fields now appear in a display-only grid on the upper half of the sub-tab, labeled “Credit Information.” Fields specific to the PLUS Application Acknowledgement (CRSP16OP) continue to appear in the lower half of the sub-tab, labeled “PLUS Application Information.”

New fields sent in the Credit Status Response and listed in the grid in the upper half of the Credit/PLUS App Info sub-tab include the following: Credit Requirements Met, Credit Action Status, Reconsideration Eligible, PLUS Counseling Completed, PLUS Counseling Complete Date, and Endorser Approved.

The display-only grid also includes credit-related fields that were previously updated only by importing a PLUS Application Acknowledgement, providing you with a more centralized and complete view of the borrower’s current credit approval, endorser, or appeal status.

**Note:** The modifiable Credit Decision and Credit Decision Date fields are available above the new display-only grid in the “Credit Information” section of the Credit/PLUS App Info sub-tab.

- **Modified PLUS and Grad PLUS End-of-Entry Edits** – We modified the conditions under which EDEXpress generates Direct Loan end-of entry edits 1050 and 3000 to reference the new Credit Requirements Met field instead of the Credit Override Code. Both edits are specific to PLUS and Grad PLUS loans.

The Credit Requirements Met value is provided in the new Credit Status Response (CRCS16OP), as well as in the Common Record Response (CRAA16OP), Web-Generated Response (CRWB16OP), and PLUS Application Acknowledgement (CRPS16OP). The Credit Override Code was sent in the discontinued Credit Decision Override Response (CRCO) file in prior award years.

The Credit Requirements Met field indicates whether a PLUS or Grad PLUS borrower has completed all necessary credit requirements to receive actual disbursements. For borrowers with an adverse credit decision, these requirements include completing the new PLUS Counseling process on StudentLoans.gov and either obtaining an approved endorser or successfully appealing the decision by documenting extenuating circumstances.

Note the following:

- Edit 1050 prevents you from adjusting the Loan Amount Approved to exceed the Endorser Amount unless certain conditions are met. The Loan Amount Approved cannot exceed the Endorser Amount unless the Credit Decision is **A** (Accepted) and the Credit Requirements Met value is **False**.
  - Edit 3000 prevents actual disbursements for PLUS or Grad PLUS loans unless the loan has a Credit Decision of **A** (Accepted) or a Credit Requirements Met value of **True**.
  - Be sure to monitor the new Credit Requirements Met value on PLUS and Grad PLUS loan records you process in EDEXpress, particularly those with a Credit Decision that is initially processed by the COD System as denied, failed, or pending. If the Credit Decision field is initially set to a value other than **A** by the COD System, it will not be updated subsequently for the same PLUS or Grad PLUS loan. Instead, you must use the Credit Requirements Field to determine if the borrower has completed all necessary steps to receive an actual disbursement.
- **New End-of-Entry Edits for Loan Period Start/End Date** – We modified Direct Loan end-of-entry edits to enable you to adjust the Loan Period Start Date or End Date associated with a loan to be after June 30, 2016 or before July 1, 2015, respectively, under specific circumstances.

Note the following:

- This enhancement only applies to changes to loan records previously processed and accepted by the COD System.
- EDEXpress only allows you to adjust the Loan Period Start Date or Loan Period End date to a date outside the 2015-2016 Award Year if the loan’s Origination Status is **A** (Accepted by COD) or **B** (Batched to send to COD).

- We added new end-of-entry edits 1110 (for Loan Period Start Date) and 1115 (for Loan Period End Date) to prevent adjusted start dates after June 30, 2016 or adjusted end dates before July 1, 2015 if the Origination Status is not A or B.

- **Revised End-of-Entry Edits Comparing Disbursement Dates to Loan Period Start/End Dates** – We modified Direct Loan end-of-entry edits 2000, 2001, and 3105 to require that disbursement dates occur no more than 10 days prior to the Loan Period Start Date or more than 180 days after the Loan Period End Date if the disbursement gross amount is greater than zero.

Note the following:

- EDEExpress generates edit 2000 or 2001 if an anticipated or actual disbursement date, respectively, is more than 10 days prior to the Loan Period Start Date and the gross disbursement amount is greater than zero.
- EDEExpress generates edit 3105 if an actual disbursement date is more than 180 days past the Loan Period End Date and the gross disbursement amount is greater than zero.

These edit modifications are designed to help increase school submissions of disbursement date corrections when the loan period start or end date is modified. The COD System relies upon accurate disbursement date information to recalculate subsidized usage information accurately for students, including remaining subsidized loan eligibility.

- **New End-of-Entry Edits for Payment Period Start Date** – We modified Direct Loan end-of-entry edits to enable you, under certain conditions, to save anticipated and actual disbursements when the Payment Period Start Date is outside the loan period. This change enables users to adjust loan information as needed to ensure correct calculations of the 150% Direct Subsidized loan limit.

Note the following:

- This enhancement only applies to changes to loan records previously processed and accepted by the COD System.
- EDEExpress only allows you to adjust the Payment Period Start Date to a date before or after the loan period start or end date if the anticipated or actual disbursement amount is zero and the loan's Origination Status is **A** (Accepted by COD) or **B** (Batched to send to COD).
- We added new end-of-entry edits, 1230 (for actual disbursements) and 1240 (for anticipated disbursements), to prevent adjustments which cause the Payment Period Start Date to be outside the loan period for any Origination Status if the disbursement amount is greater than zero, or if the Origination Status is **E** (Origination reject received from COD) or **R** (Ready to send to COD), regardless of the disbursement amount.

***Print, Browse, File Format***

- **New Credit Status Response Fields Added to Print, Browse, File Formats, and Query Functions** – We incorporated the new PLUS and Grad PLUS origination data elements provided in Credit Status Response (CRCS16OP) files into multiple Direct Loan features and functions, such as the Direct Loan Origination Record report and Direct Loan Browse (for PLUS and Grad PLUS loans). The new origination data elements are also available for selection in Direct Loan File Formats for external export files and as part of Direct Loan query statements.

The new PLUS and Grad PLUS fields covered by these enhancements include the following: Credit Requirements Met, Credit Action Status, Reconsideration Eligible, PLUS Counseling Completed, PLUS Counseling Complete Date, and Endorser Approved.

## How to Get EExpress and Documentation

You can download each EExpress 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](http://fsadownload.ed.gov).

### EExpress Software

Instructions for downloading EExpress are located in the "Downloading Documentation and Software from the FSAdownload Web Site" section of the [2015-2016 Installation Guide for EExpress 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

The [EExpress for Windows 2015-2016, Release 2.0 Desk Reference](#) is now available on the FSAdownload Web site. The desk reference provides detailed, step-by-step instructions on the setup and use of the EExpress Pell Grant and Direct Loan modules.

Also, as noted earlier in this letter, the *2015-2016 COD Technical Reference* provides technical specifications and record layouts for transmitting Pell Grant, TEACH Grant, and Direct Loan data to the COD System. You can download the latest version of the technical reference from the FSAdownload Web site.

## 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](mailto: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](http://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](mailto:CODSupport@ed.gov).