

January 2016

RE: EDEExpress for Windows 2016-2017, Release 1.0

Dear EDEExpress Users:

Federal Student Aid is pleased to announce the availability of EDEExpress for Windows 2016-2017, Release 1.0. Release 1.0 is the initial EDEExpress software release for the 2016-2017 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 2016-2017, Release 1.0
- A list of 2016-2017 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 2016-2017 Release 1.0 Packaging module.

EDEExpress 2016-2017, Release 1.0

EDEExpress 2016-2017, 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 2016-2017, 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 August 2015. If necessary, we will update the NCES information used by EDEExpress 2016-2017 in a future release.

Release 1.0 does not overwrite your EDEExpress 2015-2016 database; instead, it creates a new database specific to 2016-2017 data. You can pull forward certain EDEExpress 2015-2016 data elements for use in 2016-2017, 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 2016-2017, 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 2016-2017 cycle. Message classes with cycle indicators are also updated for 2016-2017 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 2016-2017, see the Processing Codes section of the *2016-2017 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 2016-2017 FAFSA** – The EDEExpress software's Windows icon and splash screen (which is displayed when you first start the software) have been color-coded orange to match the 2016-2017 Free Application for Federal Student Aid (FAFSA[®]) form.

Application Processing

The following enhancements are available in the EDEExpress 2016-2017 Application Processing module:

ISIR Import

- **Modification to ISIR Import Updates to Student Eligibility Code Field** – We modified the ISIR import process to set the Student Eligibility Code field on the Demo tab to **07** (GED or State Authorized HS Equivalent Certificate) when the HS Diploma or Equivalent value on the ISIR is **2** (GED/State Equivalent Test) and the field is blank on the Demo tab. This enhancement reverses an EDEExpress 2015-2016 change that set the Student Eligibility Code to blank in this scenario due to differing values on the COD System and the CPS.

The ISIR import process also 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).

If the ISIR import function does not update the Student Eligibility Code field, you must use manual entry, Global multiple entry, or the external origination add/change import options available in the Direct Loan, Pell Grant, and TEACH Grant modules to update the field before you can originate or save a loan or grant record for the student.

Note: See the *2016-2017 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 2016-2017.

ISIR View, Print, File Format, and Query

- **New and Modified ISIR Fields Available** – New and modified data elements on the 2016-2017 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 *2016-2017 ISIR Guide*, available on the FSAdownload Web site, for more detailed information on changes to the ISIR for 2016-2017.

- **ISIR Federal School Code Information Now Limited to Recipient** – ISIR transactions sent by the CPS now only include the Federal School Code (and its associated housing plan) of the destination point receiving the ISIR file, instead of including all Federal School Codes in the order selected by the applicant. If you are a servicer for more than one of the Federal School Code values selected by a student for a specific ISIR transaction, you will receive that transaction multiple times in the same ISIR file, the only difference being the Federal School Code listed on each version of the transaction.

As a result of this CPS change, we modified EDEExpress 2016-2017, Release 1.0 to enable the import of the same ISIR transaction multiple times. Also, EDEExpress now allows only one Federal School Code to be printed on each copy of an ISIR; the selected code is always printed in the School #1 position on the ISIR. The new required School Code field on the App Express Print dialog box (**File, Print, App Express**) indicates which Federal School Code you want printed on the ISIR report.

NSLDS View and Print

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

Note: See the *2016-2017 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 2016-2017.

Packaging

While no major changes have been made to the EDEExpress Packaging module for 2016-2017, 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 2016 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 2015-2016 Pell Grant payment and disbursement schedules in [Dear Colleague Letter GEN-15-02](#), posted on January 29, 2015 to the Information for Financial Aid Professionals ([IFAP](#)) Web site.

After ED's Fiscal Year 2016 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 2016-2017 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 2015-2016, your enrollment status rolls over to 2016-2017.
- 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 fsawebnroll.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 2016-2017*.

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 2016-2017 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 2016-2017. The *EDEExpress Packaging Technical Reference* also contains worksheets you can use to help plan and implement your Packaging module setup in EDEExpress 2016-2017.

Compatibility and Compliance

Microsoft Windows Information

While we do not officially support the Microsoft Windows 8 or Windows 7 operating systems for use with our EDESuite PC products (including EDEExpress and DL Tools), we have performed compatibility testing with each operating system and resolved the majority of the issues discovered during testing.

- In September 2015, we tested Microsoft Windows 8 as an operating system during our development of the 2016-2017 version of our EDESuite PC software. Our test results indicated that schools should be able to proceed with use of Windows 8 without encountering any issues.
- 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.

Note: Federal Student Aid has not yet tested the Microsoft Corporation's Windows 10 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 10 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 2016-2017.

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.