

April 2016

RE: EDEExpress for Windows 2016-2017, Release 2.0

Dear EDEExpress Users:

Federal Student Aid is pleased to announce the availability of EDEExpress for Windows 2016-2017, 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 2016-2017 award cycle.

About this Cover Letter

This letter includes the following information:

- An overview of EDEExpress 2016-2017, Release 2.0
- Important notices regarding:
 - Pell Grant payment and disbursement schedules in Release 2.0
 - Use of Additional Eligibility Indicator in Pell Grant module
- Information on how to obtain the software and documentation
- Microsoft Windows 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 2016-2017 COD System, see the [February 25, 2016 electronic announcement](#) posted to Federal Student Aid's Information for Financial Aid Professionals (IFAP) Web site located at 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) 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.

EDEExpress for Windows 2016-2017, Release 2.0 Overview

EDEExpress 2016-2017, 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 EDEExpress.

EDEExpress 2016-2017, Release 2.0 can be installed as an upgrade to Release 1.0 (posted in January 2016). 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 EDEExpress 2016-2017 production database (**expres16.mdb**).

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

If you have not previously installed EDEExpress 2016-2017, 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 EDEExpress 2016-2017 database to your system. If you have an existing 2016-2017 database, a Stand Alone Full or a Network Server/Workstation Full installation of Release 2.0 will overwrite your database and all previously entered 2016-2017 data will be lost.

For more technical guidance and information regarding the EDEExpress installation process, see the [Installation Guide for EDEExpress for Windows 2016-2017](#), which is available for download from the U.S. Department of Education’s Federal Student Aid Download (FSAdownload) Web site at fsadownload.ed.gov.

Federal Pell Grant Payment and Disbursement Schedules in EDEExpress 2016-2017, Release 2.0

Federal Student Aid announced the 2016-2017 Pell Grant Payment and Disbursement schedules in [Dear Colleague Letter GEN-16-01](#), posted on January 29, 2016 to the IFAP Web site.

As noted in the Dear Colleague Letter, the maximum 2016-2017 Pell Grant award for a full-time student with an Expected Family Contribution (EFC) of zero is \$5,815, an increase of \$40 over the 2015-2016 maximum of \$5,775. The maximum Pell-eligible EFC is also increased for 2016-2017 from the 2015-2016 maximum of 5198 to 5234. As a result of the EFC increase, some applicants who were initially processed by the Central Processing System (CPS) as ineligible for a 2016-2017 Pell Grant award due to their EFC are now Pell-eligible.

The CPS began processing 2016-2017 application and correction records according to the updated Pell Grant Payment and Disbursement schedules on April 3, 2016. The CPS also reprocessed 2016-2017 Institutional Student Information Records (ISIRs) on April 6, 2016 for students who applied before April 3 and, under earlier formulas, were designated as not being Pell-eligible, but who are now eligible for a 2016-2017 Pell Grant under the new formulas due to their EFC.

For more information and a complete description of the changes for the 2016-2017 Award Year, see Dear Colleague Letter GEN-16-01 and the [March 1, 2016 electronic announcement](#) posted to the IFAP Web site.

EDEExpress 2016-2017, Release 2.0 incorporates the 2016-2017 Pell payment and disbursement schedules into EDEExpress in the following functionality (listed by module):

Global

We updated the Pell Grant Regular Schedule tab available under **Tools, Browse, Global** to reflect the 2016-2017 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 2016-2017 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 6, 2016 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-16-01. The Repackage process will update the Pell Grant awards for your Packaging records to follow the 2016-2017 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 2016-2017 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 2016-2017, 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 2016-2017 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 2016-2017, 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 2016-2017 for the first time. For more information on the 2016-2017 enhancements to Application Processing, Packaging, and Global functionality introduced in Release 1.0, see the [EDEExpress for Windows 2016-2017, 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 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](#). For more information regarding message classes used by the COD System in 2016-2017, see Volume III, Section 2 of the [2016-2017 COD Technical Reference](#). Both documents are available on the FSAdownload Web site.

- **Updated EDEExpress Icon and Splash Screen Color to Match 2016-2017 FAFSA** – The EDEExpress software's Windows icon and splash screen (displayed when you start the software) are now colored orange to match the 2016-2017 Free Application for Federal Student Aid (FAFSA[®]) form.

Global

The following Global enhancement is available in Release 2.0:

- **Financial Aid Shopping Sheet Profile Setup Modified to Use IPEDS Unit ID** – We updated Financial Aid Shopping Sheet functionality to use the Integrated Postsecondary Education Data System (IPEDS) Unit ID from the National Center for Education Statistics (NCES) as the key identifier for the school information that prints on the document instead of the OPE ID. This change enables EDEExpress users to print information on the Financial Aid Shopping Sheet associated with specific physical and online campuses that have an IPEDS Unit ID but not a unique OPE ID.

We updated the Financial Aid Shopping Sheet Profiles setup dialog box (**Tools, Setup, Global, Financial Aid Shopping Sheet Profiles**) to add the IPEDS Unit ID as a required field for each profile. The OPE ID field is now display only and indicates the OPE ID associated with the IPEDS Unit ID you select.

Note: If there are multiple IPEDS Unit IDs associated with your OPE ID, and you created Financial Aid Shopping Sheet Profiles in EDEExpress 2016-2017, Release 1.0, you must update and save each profile with the correct IPEDS Unit ID in setup after installing Release 2.0 to continue using the profiles or to print Financial Aid Shopping Sheets for students associated with the profiles.

App Express

The following App Express enhancement was implemented in Release 1.0 and is also available in Release 2.0:

- **Modification to ISIR Import Updates to Student Eligibility Code Field** – We modified the ISIR import process in the App Express module 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 App Express module's 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).

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 state equivalent test or was home-schooled.

If the ISIR import function does not update the Student Eligibility Code field, you must continue to 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.

For a list of valid Student Eligibility Code values, see the latest version of Volume II, Section 1 of the *2016-2017 Common Origination and Disbursement (COD) Technical Reference*, which is available for download from the FSAdownload Web site.

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

We updated valid date ranges for the 2016-2017 award year to synchronize EDEExpress 2016-2017 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	1/1/2016 to 6/30/2017
Pell Grant Payment Period Start Date	1/1/2016 to 6/30/2017
Pell Grant Disbursement Date*	1/1/2016 to 9/30/2022*
TEACH Grant Enrollment Date, Payment Period Start Date, and Disbursement Date	On or after 1/1/2016
Direct Loan Date of Birth	1/1/1917 to 12/31/2008
Direct Loan Loan Period Begin Date	On or before 6/30/2017
Direct Loan Loan Period End Date	On or after 7/1/2016
Direct Loan Academic Year Start Date	On or before 6/30/2017
Direct Loan Academic Year End Date	On or after 7/1/2016
Direct Loan Disbursement Date (all loan types)	6/21/2013 to 12/28/2020

* Although EDEExpress accepts any date on or after 1/1/2016, the valid 2016-2017 date range for Pell Grant disbursement records is from the date the 2016-2017 Pell schedules are posted on the IFAP Web site to 9/30/2022.

Direct Loan Enhancements

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

Import

- **Credit Decision Override Response (CRCO) Removed from Common Record Import Type** – We modified the Direct Loan Import dialog box (**File, Import, Direct Loan**) to remove the Credit Decision Override Response message class (CRCO) from the COD Common Record Response import type. Earlier in 2015, the COD System discontinued the Credit Decision Override Response file type for all award years, replacing it with the Credit Status Response (CRCS17OP).

- **Credit Decision Replaced with Credit Requirements Met in External Import Record Layouts** – To align more effectively with COD System changes implemented in spring 2015, we updated credit-related end-of-entry edits and functionality applicable to PLUS and Grad PLUS records in the Direct Loan module to emphasize the use of the Credit Requirements Met field over the Credit Decision field when determining a borrower’s eligibility to receive actual disbursements.

As part of this update, we replaced the Credit Decision field with the Credit Requirements Met field in the record layout for Direct Loan External Import Loan Origination Add (DIEA17OP) import files. We also reassigned the Credit Decision Indicator import change field number (P010) to the Credit Requirement Met field for use in Direct Loan External Import Change (DIEC17OP) files. These enhancements enable you to update the Credit Requirements Met field on multiple new or existing PLUS and Grad PLUS origination records.

The Credit Requirements Met field indicates whether a PLUS or Grad PLUS borrower has completed all necessary credit requirements to receive actual disbursements for the loan. For PLUS and Grad PLUS borrowers with adverse credit check results, these requirements include either obtaining an approved endorser or appealing the decision successfully by documenting extenuating circumstances. PLUS and Grad PLUS borrowers with adverse credit check results must also complete the PLUS Counseling process on Federal Student Aid’s StudentLoans.gov Web site to receive actual disbursements for the loan.

The COD System provides the latest Credit Requirements Met value (which may overwrite values you add or modify in your external import files) in the Credit Status Response (CRCS17OP), COD Common Record Response (CRAA17OP), Web-Generated Response (CRWB17OP), and PLUS Application Acknowledgment (CRSP17OP).

- **External Change Import Modified to Allow Adjustments to Multiple Disbursement Fields in Same Sequence Number** – In response to October 2015 enhancements to the COD System, we modified EDEExpress 2016-2017 to enable you to adjust multiple financial and non-financial Direct Loan actual disbursement data elements in the same sequence number. Instead of requiring a unique sequence number for each change, EDEExpress now allows you to correct the disbursement amount, disbursement date, Payment Period Start Date, Enroll OPE ID, Enrollment Status, and CIP Code for a Direct Loan actual disbursement in a single sequence number.

This change resulted in several updates to the process of using Direct Loan External Import Change (DIEC17OP) files to modify existing Direct Loan records in your database. Most prominently, you are no longer required to include the Action Type (also known as Disbursement Type) field in your external change file; this was a single-character value that identified the single Direct Loan disbursement data element you were adjusting in the sequence number. Now that you can correct multiple data elements in the same sequence number, this field is no longer needed by EDEExpress.

We also reassigned import change field number D006 to a new field called “Net Adjustment Amount?” If you are adjusting an actual disbursement amount using the Action Amount field (D007) and you set the “Net Adjustment Amount?” in your external change file to **Y**, EDEExpress interprets the value you provide in the Action Amount field as the positive or negative adjustment to the prior sequence number’s net disbursement amount.

Note: If you prefer to provide the new total net disbursement amount in the Action Amount field (as opposed to the net positive or negative adjustment to the prior net disbursement amount), omit the “Net Adjustment Amount?” field from your External Import Change file.

- **COD Common Record Response Import Edit Report Update to Indicate Loan Amount Approved Adjustments** – We expanded the import edit report for the COD Common Record Response (CRAA17OP) to add a section listing Direct Loan records for which the COD System reduced the Loan Amount Approved to match the sum of the loan’s current anticipated and actual disbursement amounts. The COD System will implement this change later in 2016.

The new import edit report section is printed on a separate page labeled Loan Amount Approved Modifications Report; it lists the loan’s original Loan Amount Approved in your database and the new Loan Amount Approved provided by COD in the response file. If the report indicates the COD System reduced the Loan Amount Approved for a loan record, you should review Loan Amount Approved and disbursement amounts on the corresponding EDEXpress record and update the values accordingly to account for the discrepancy.

- **Direct Loan Booking Warning Report Import Type Added** – In October 2015, the COD System replaced the 30-Day Warning Report with the Direct Loan Booking Warning Report, which provides expanded flexibility to Direct Loan users. In response, we replaced the 30-Day Warning Report import type in the Direct Loan Import dialog box (**File, Import, Direct Loan**) with a new import type for the Direct Loan Booking Warning Report. The preformatted version of the Direct Loan Booking Warning Report used by EDEXpress is sent under the same message class (DIWR17OP) as the 30-Day Warning Report used previously.

Note: For more information on the Direct Loan Booking Warning Report, see Volume VI, Section 8 of the *2016-2017 Common Origination and Disbursement (COD) Technical Reference*, which is available for download from the FSAdownload Web site.

Entry

- **Credit/PLUS App Info Sub-Tab and Disburse Tab Revisions Emphasize Credit Requirements Met Field** – To align more effectively with COD System changes implemented in spring 2015, we updated credit-related end-of-entry edits and functionality applicable to PLUS and Grad PLUS records in the Direct Loan module to emphasize the use of the Credit Requirements Met field over the Credit Decision field when determining a borrower’s eligibility to receive actual disbursements.

As part of this update, we made several changes to the Credit/PLUS App Info sub-tab of the Origination (Direct Loan) tab and the Disburse (Direct Loan) tab:

- We moved the Credit Requirements Met field from the display-only grid to the top of the sub-tab and made it modifiable. You can now set the Credit Requirements Met field value manually, by using Direct Loan Multiple Entry, or by importing a Direct Loan External Import Loan Origination Add (DIEA17OP) or Direct Loan External Import Change (DIEC17OP) file.
- We moved the Credit Decision field from the top of the sub-tab to the display-only grid and made it a non-modifiable field. We also removed the Credit Decision value of **F** (Credit denied per COD Web site) from the software for 2016-2017.

- We removed the Credit Override Code from display-only grid. The COD System no longer provides this field for PLUS or Grad PLUS records.
- We replaced the display-only Credit Decision field at the top of the Disburse tab with a display-only Credit Requirements Met field, which reflects the current field value for the PLUS or Grad PLUS loan from the Credit/PLUS App Info sub-tab for quick reference.
- **Disburse Tab Redesigned to Simplify Adjustment Process** – In response to October 2015 enhancements to the COD System, we modified EDEExpress 2016-2017 to enable you to adjust multiple financial and non-financial Direct Loan actual disbursement data elements in the same sequence number. Instead of requiring a unique sequence number for each change, EDEExpress now allows you to correct the disbursement amount, disbursement date, Payment Period Start Date, Enroll OPE ID, Enrollment Status, and CIP Code for a Direct Loan actual disbursement in a single sequence number.

In response to this change, we redesigned the top section of the Disburse (Direct Loan) tab to simplify the entry of actual disbursement adjustments:

- We relabeled the top section of the Disburse tab specific to adjustment entry to “Actual Disbursement Changes.” In prior cycles, this sub-section was labeled “Action.”
- We removed the Disbursement Type field from the Disburse tab; EDEExpress no longer requires that you identify the individual actual disbursement data element you are adjusting in a new disbursement sequence number.
- We added the new “Net Adjustment Amount?” field to the Actual Disbursement Changes section of the tab; if you select this checkbox, EDEExpress considers the positive or negative amount you provide in the Disbursement Amount field as the adjustment to the net disbursement amount of the prior disbursement sequence number.
- After selecting the disbursement number you are updating in the Actual Disbursement Changes section of the tab, you can modify the disbursement amount, disbursement date, Enroll OPE ID, and/or Payment Period Start Date. Clicking the **Add Disbursement** button adds the modified values to the grid as a new sequence number.
- **Multiple Entry Modified to Allow Adjustments to Multiple Disbursement Fields in Same Sequence Number** – As with the manual entry and external import updates described earlier in this section, we modified Direct Loan Multiple Entry (**Process, Multiple Entry, Direct Loan**) to allow you to modify multiple actual disbursement data elements in the same disbursement sequence number. The enhancements to Direct Loan Multiple Entry include the following updates:
 - We removed the Disbursement Type field from the Direct Loan Multiple Entry dialog box.
 - We added the new “Net Adjustment Amount?” field; if you select the checkbox for this field in the Direct Loan Multiple Entry dialog box, EDEExpress considers the positive or negative amount you provide in the Disbursement Amount field as the adjustment to the net disbursement amount of the prior disbursement sequence number.
 - We removed or modified data edits that prevented adjustments to more than one actual disbursement data element.

- **Automatic Loan Amount Approved Reductions During Disbursement Updates** – To help improve the accuracy of Direct Loan data on the COD System, EDEExpress now reduces the Loan Amount Approved (on the Origination tab) automatically to match the sum of all current anticipated and actual disbursements. The software performs this comparison and (if necessary) automatic reduction each time you save changes to disbursement amounts which result in the sum of total disbursements being less than the Loan Amount Approved, regardless of the method used (i.e., manual entry, Multiple Entry, or external import).

The software also displays a warning message on the Disburse tab during the save process indicating the Loan Amount Approved reduction will occur if you enter adjusted disbursement amounts that result in a higher Loan Amount Approved value than the sum of the current anticipated and actual disbursements for the record. Note that this warning message is not displayed when Loan Amount Approved reductions occur as a result of updating disbursements using Multiple Entry or by importing an External Import Change (DIEC17OP) file.

Note: If you are entering increases and decreases to multiple disbursement amounts at the same time on the Disburse tab, we recommend you enter all adjustments to all amounts before saving the record. Otherwise, if you enter and save disbursement amount adjustments individually that result in a Loan Amount Approved reduction, you must increase and save the Loan Amount Approved value on the Origination tab before increases to other amounts on the Disburse tab will be allowed.

Data Edits

- **Modified PLUS and Grad PLUS End-of-Entry Edits** – We modified the conditions under which EDEExpress generates Direct Loan end-of entry edits 1050 and 3000 to reference the Credit Requirements Met field only. Both edits are specific to PLUS and Grad PLUS loans.
- **End-of-Entry Edits Modified for Actual Disbursement Adjustments** – We revised Direct Loan end-of-entry edits associated with adding Direct Loan actual disbursement adjustments to EDEExpress to enable you to adjust multiple disbursement data elements in the same sequence number. These enhancements include revisions to the condition, message, or other aspects of edits 1215, 1220, 3042, and 3050.

We also deleted Direct Loan end-of-entry edits from prior cycles that checked for specific disbursement type values with each adjustment or required that actual disbursement adjustments be limited to one data element per sequence number. These deletions included edits 3051, 3060, 3070, 3075, 3076, 3077, and 3078.

Note: For more information on the EDEExpress Direct Loan end-of-entry edits, see Volume III, Section 4 of the *2016-2017 Common Origination and Disbursement (COD) Technical Reference*, which is available for download from the FSAdownload Web site.

Print, Browse, File Format

- **PLUS and Grad PLUS Disclosure Statement Print Requirements Updated to Check Credit Requirements Met Value** – To print a disclosure statement from EDEExpress for a PLUS or Grad PLUS loan, the record must now have a Credit Requirements Met value of Yes in addition to other existing criteria. We no longer require or check for a specific Credit Decision value. Select **File, Print, Direct Loan** to select the PLUS or Grad PLUS Disclosure Statement report type for printing.

- **Credit Decision Replaced with Credit Requirements Met on Reports** – The Direct Loan List–Loans and List–Status reports now print the current Credit Requirements Met value for PLUS and Grad PLUS records, rather than the current Credit Decision value. The Credit Decision value is no longer taken into consideration by EDEExpress when determining if a PLUS or Grad PLUS borrower has met all credit-related requirements to receive actual disbursements for the loan.
- **Disbursement Type Field Removed from Direct Loan Functions** – We removed the Disbursement Type field from multiple Direct Loan list and reports, as well as other Direct Loan functionality, such as Query, File Formats setup, and Browse. The Disbursement Type field was used in prior versions of EDEExpress to identify which actual disbursement data element was being corrected in a new sequence number.

TEACH Grant Enhancements

The following enhancements are available in the TEACH Grant module in Release 2.0:

Import

- **COD Common Record Response Import Edit Report Update to Indicate Award Amount for Entire School Year Adjustments** – We expanded the import edit report for the COD Common Record Response (CRAA17OP) to add a section listing TEACH Grant records for which the COD System reduced the Award Amount for Entire School Year to match the sum of the record’s current anticipated and actual disbursement amounts. The COD System will implement this change later in 2016.

The new import edit report section is printed on a separate page labeled Award Amount for Entire School Year Modifications Report; it lists the record’s original Award Amount for Entire School Year in your database and the new Award Amount for Entire School Year provided by COD in the response file. If the report indicates the COD System reduced the Award Amount for Entire School Year for a record, you should review the Award Amount for Entire School Year and disbursement amounts on the corresponding EDEExpress record and update the values accordingly to account for the discrepancy.

Entry

- **Automatic Award Amount for Entire School Year Reductions During Disbursement Updates** – To help improve the accuracy of TEACH Grant data on the COD System, EDEExpress now reduces the Award Amount for Entire School Year (on the Origination tab) automatically to match the sum of all current anticipated and actual disbursements. The software performs this comparison and (if necessary) automatic reduction each time you save changes to disbursement amounts which result in the sum of total disbursements being less than the Award Amount for Entire School Year, regardless of the method used (i.e., manual entry, Multiple Entry, or external import).

The software also displays a warning message on the Disburse tab during the save process indicating the Award Amount for Entire School Year reduction will occur if you enter adjusted disbursement amounts that result in a higher Award Amount for Entire School Year value than the sum of the current anticipated and actual disbursements for the record. Note that this warning message is not displayed when reductions occur as a result of updating disbursements using Multiple Entry or by importing an External TEACH Grant Data file (TGED17OP).

Note: If you are entering increases and decreases to multiple disbursement amounts at the same time on the Disburse tab, we recommend you enter all adjustments to all amounts before saving the record. Otherwise, if you enter and save disbursement amount adjustments individually that result in an Award Amount for the Entire School Year reduction, you must increase and save the Award Amount for the Entire School Year value on the Origination tab before increases to other amounts on the Disburse tab will be allowed.

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.

EExpress Software

Instructions for downloading EExpress are located in the "Downloading Documentation and Software from the FSAdownload Web Site" section of the [2016-2017 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 2016-2017, 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 *2016-2017 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 Information

While we do not officially support the Microsoft Windows 8 or Windows 7 operating systems for use with our EDESuite PC products (including EExpress 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. 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.