September 2017

RE: EDExpress for Windows 2018-2019, Release 1.0

Dear EDExpress Users:

Federal Student Aid is pleased to announce the availability of EDExpress for Windows 2018-2019, Release 1.0. This is the initial EDExpress software release for the 2018-2019 award cycle and includes the Application Processing and Packaging modules, as well as Global functionality such as Security setup, Document Tracking, and User Database.

Important Note: We redesigned the EDExpress software for 2018-2019 to implement software enhancements that improve usability, increase security, and eliminate outdated functionality. See the "Overview of EDExpress Redesign" section and other sub-sections below for more information about new and revised functionality, including login guidance.

About this Cover Letter

This letter includes the following information:

- Overview of EDExpress 2018-2019, Release 1.0
- Overview of EDExpress Redesign
- Login Information for EDExpress 2018-2019
- A list of 2018-2019 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 EDExpress 2018-2019 Release 1.0 Packaging module.

EDExpress 2018-2019, Release 1.0

EDExpress 2018-2019, 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 EDExpress. Release 1.0 also includes setup, entry, import, and printing functionality for the Financial Aid Shopping Sheet.

Note: EDExpress 2018-2019, 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 EDExpress was most recently updated in April 2017 (in EDExpress 2017-2018, Release 2.0). If necessary, we will update the NCES information used by EDExpress 2018-2019 in a future release.

Release 1.0 does not overwrite your EDExpress 2017-2018 database; instead, it creates a new database specific to 2018-2019 data. You can pull forward certain EDExpress 2017-2018 data elements for use in 2018-2019, including setup parameters, student demographic data, and user-defined data fields, using the Prior Year Import feature.

New for 2018-2019! Due to changes in minimum password requirements, user IDs and passwords established in your EDExpress 2017-2018 Security Users setup are not pulled forward to EDExpress 2018-2019. You must recreate *all* user IDs and passwords in EDExpress 2018-2019 based on the default or custom settings defined in the new Password Setup dialog box (**Tools**, **Setup**, **Global**, **Password Setup**).

EDExpress 2018-2019 Redesign

EDExpress 2018-2019 redesign enhancements include the following:

- The EDExpress Desktop, which provides a multi-paned, dynamically updated view of key information and quick access to frequently used functions from the software's main screen. See the next section of this cover letter for more information.
- Reinforced security setup options and password requirements that help keep your EDExpress database and student data more secure.
- The ability to apply password protection to external export files and any documents printed from EDExpress to an external file.
- The use of Adobe PDF (Portable Document Format) for all print options.
- Automatic archival, compression, and encryption of imported data files in a secure, easily accessible format.
- The ability to resize, minimize, and maximize window and desktop pane sizes within EDExpress.
- Updated all date-related entry fields to standardize entry in MMDDCCYY format.
- Deleted functionality, fields, message classes, and other references to outdated or obsolete programs, reports, and other features no longer in use.

For additional guidance on these enhancements, see EDExpress Help in the software and the *EDExpress for Windows 2018-2019, Release 1.0 Desk Reference*, which is available on the U.S. Department of Education's Federal Student Aid Download (FSAdownload) Web site located at fsadownload.ed.gov.

The EDExpress Desktop

New for 2018-2019! The EDExpress Desktop is a new navigation tool for 2018-2019, providing quick and easy access to frequently used functionality and critical information in a multi-pane format. Pending imports can be accessed directly from the desktop. In the Queries pane, you can select a pre-existing query and results will display in the pane and refresh both at regular intervals and upon each new startup of the software. As results update, you can use the incoming information to identify database records requiring further attention, and to drive your office's workflows.

The Startup Information pane displays warning messages and other information that used to appear after logging in to EDExpress. The Favorites pane provides quick access to print functionality for the documents you generate most often in EDExpress. The desktop also includes an RSS Feed with links to new and updated documents in What's New on IFAP, the IFAP calendar, or the latest IFAP podcasts.

Using the EDExpress Desktop is optional; you can show or hide the desktop by selecting or clearing the **Show Desktop** checkbox in the Desktop Settings dialog box (**View**, **Desktop Settings**). The familiar EDExpress menu bar is available whether the desktop is displayed or not. Desktop settings are specific to your EDExpress user ID.

See the sub-sections below for more information on settings and specific panes of the new EDExpress desktop.

Startup Information Pane

The Startup Information pane of the new EDExpress desktop replaces the Startup Information dialog box that appeared in prior versions of EDExpress after logging into the software. The Startup Information pane displays informational messages regarding key EDExpress functionality, warnings about potential issues you might encounter, and alerts to errors and critical problems affecting your ability to start or use the software.

For example, EDExpress might display a message in this pane to alert you that your disk space is low or, if you are starting EDExpress for the first time, remind you that your assumed school code has not been defined.

Some warnings and error messages can be cleared from the pane by clicking the **Suppress** button under the message text. For other messages, the pane displays an **Update** button you can click to access the software area related to the message and resolve the issue it describes.

Favorites Pane

The Favorites pane of the new EDExpress Desktop provides you with a quick shortcut to print functionality for the reports, lists, letters, and other documents you generate frequently in EDExpress.

To designate EDExpress reports you print frequently as "favorites," click the star icon to the right of the report type in the Print dialog box. Reports marked as favorites appear automatically in the Favorites pane of the EDExpress desktop. To remove the designation of a report as a favorite, return to the Print dialog box for the report and click

the star icon again. If you want to remove all reports designated as favorites from the EDExpress desktop, go to **View**, **Desktop Settings** and click **Clear Favorites**.

Pending Imports Pane

The Pending Imports pane of the new EDExpress Desktop lists data files in your import data directory that have yet to be imported into EDExpress, as well as import types you can perform, such as prior year import and ISIR import into the Packaging module. You can choose to import or suppress each file or import type displayed in the pane by clicking the corresponding button.

If you click the import button, EDExpress opens the appropriate import dialog box for the module associated with the file or import type. You can then designate additional import options and settings and initiate the import process.

If you choose to suppress a specific data file or import type in the Pending Imports pane, EDExpress filters all future files with the same message class or the specified import type from the pane. You can clear these suppressions in the desktop settings (**View**, **Desktop Settings**). Suppression settings are specific to your User ID and do not affect your ability to locate or import files directly from the import dialog boxes of EDExpress modules.

Note: If your import data directory is located on a network and multiple EDExpress users in your office routinely import data files, note that the files listed in Pending Imports section change dynamically with each refresh of the desktop to remove files from the list that have been imported by you or another user. Use the desktop settings (**View**, **Desktop Settings**) to adjust the refresh rate for the Pending Imports pane and other desktop panes.

Note: The security group associated with your user ID in EDExpress Security Users setup (**Tools**, **Setup**, **Global**, **Security Users**) must have access to import functionality to use the Pending Imports pane.

Queries Pane

The Queries pane of the new EDExpress Desktop enables you to select module-specific predefined or custom queries from Query setup, view the current number of student records in your database meeting each query's criteria, and quickly access software functions for the records where applicable, such as opening the records as a group or initiating the multiple entry or browse dialog boxes. Query results display in the pane and refresh both at regular intervals and upon each new startup of the software. As results update, you can use the incoming information to identify database records requiring further attention, and to drive your office's workflows.

The queries you select for the Queries pane must already exist in Query setup (**Tools**, **Query**). To add a query to the Queries pane, click the **Settings** button in the top right corner of the pane to access the Query Settings dialog box. In the Query Settings dialog box, select the applicable module, record type, and title for the query (from Query setup), then confirm or modify the custom title for the query that will display in the Queries pane. If you select a parameter query, you must also click the Parameter button to specify the desired value range.

After adding a query to the Queries pane, the Count column displays the current number of records in your database that meet the query criteria. The record count is updated dynamically by EDExpress based on the refresh rate you select in the desktop settings (**View**, **Desktop Settings**).

If EDExpress determines that at least one record in your database meets the query criteria, you can click **Open** under the query row to open the qualifying records, similar to selecting a query in the Student Search toolbar function. After EDExpress opens the records, you can use the left and right arrow keys in the toolbar to navigate between student records. You can also click the **Multiple Entry** and **Browse** buttons to update or view the records meeting the query criteria. The Multiple Entry button does not appear for App Express queries, as that module does not have a multiple entry function.

If you want to remove a specific query from your Queries pane, locate the query in the Query settings dialog box and click the **Delete** button (this action only removes the query from the pane – the query remains available for use in selection criteria for specific EDExpress functionality). If you want to clear all queries from the Queries pane, click **Clear Queries** in desktop settings (**View**, **Desktop Settings**).

Note: The security group associated with your user ID in EDExpress Security Users setup (**Tools**, **Setup**, **Global**, **Security Users**) must have access to opening student records, using multiple entry, and browsing records for associated buttons to appear under applicable queries in the pane.

RSS Feed Pane

The RSS Feed pane of the new EDExpress Desktop enables you to display links to current information from Federal Student Aid's Information for Financials Aid Professionals (IFAP) Web site. Click the **Settings** button in the top right corner of the pane to access the RSS Feed Settings dialog box, where you can indicate whether you want the RSS Feed pane to display links to What's New items from IFAP home page, calendar items from the site, or IFAP podcasts. The title of the pane changes dynamically based on the IFAP RSS feed option you select in settings.

The information displayed in the RSS Feed pane is updated dynamically by EDExpress based on the refresh rate you select in the desktop settings (**View**, **Desktop Settings**).

If you do not want the EDExpress desktop to display the RSS Feed pane, clear the **Show RSS Feed** checkbox in desktop settings (**View**, **Desktop Settings**).

Desktop Settings

Use the Desktop Settings dialog box (**View**, **Desktop Settings**) to show or hide the EDExpress Desktop. If you want to show the desktop, set your refresh rate and RSS Feed preferences here. You can also use this dialog box to clear desktop suppressions of items from the Startup Information and Pending Imports pane, clear print favorites, or clear the Queries pane. You must click **OK** for changes you make in this dialog box to apply.

Logging into EDExpress 2018-2019

When you first access EDExpress 2018-2019 after installation, the default User ID is SYSADMIN and the default password is **$y$tem Adm1n**. Be sure to include the space between **$y$tem** and **Adm1n** (the two parts of the default password).

After you enter the default user ID and password, EDExpress 2018-2019 requires that you immediately define a new password for the SYSADMIN. Beginning with Release 1.0, new passwords must be a minimum of 12 characters and must include at least one uppercase letter, one lowercase letter, one number, and one keyboard character that is not a letter or number (such as an exclamation mark or other punctuation symbol). You can adjust the minimum password length and other requirements in the new Password Setup dialog box (**Tools**, **Setup**, **Global**, **Password Setup**).

In addition, the SYSADMIN user ID now only provides access to critical administrative functions in order to limit its use for routine software tasks and improve your ability to trace actions taken in the software to specific users. EDExpress administrators at your school should create unique user IDs in Security Users setup with the necessary access (based on the associated Security Group) and log into the software under those IDs for most software tasks they perform.

For more information on security setup, see EDExpress Help in the software and the *EDExpress for Windows 2018-2019, Release 1.0 Desk Reference*.

Release 1.0 Enhancements

The following product enhancements have been incorporated into EDExpress 2018-2019, Release 1.0.

General

- **Updated Cycle References and Message Classes** – We updated software labels, help system topics, reports, and other functionality throughout EDExpress to reference the 2018-2019 cycle. Message classes with cycle indicators are also updated for 2018-2019 in File Management (**Tools**, **Setup**, **Global**, **File Management**) and in various Import and Export dialog boxes throughout EDExpress.

  Note: For more information regarding message classes used by the CPS in 2018-2019, see the Processing Codes section of the *2018-2019 Electronic Data Exchange (EDE) Technical Reference*, available on the FSAdownload Web site.

- **Updated EDExpress Icon and Splash Screen Color to Match 2018-2019 FAFSA –** The EDExpress software's Windows icon and splash screen (which is displayed when you first start the software) have been color-coded green to match the 2018-2019 Free Application for Federal Student Aid (FAFSA®) form.

- **EDExpress Print Update to Adobe PDF Format** – EDExpress now creates and stores all reports, lists, letters, and other documents in Adobe Portable Document Format (PDF). You are not required to have Adobe software installed on your PC workstation to print or view EDExpress reports. However, you must have Adobe Reader (free software) or Adobe Acrobat (licensed software) and either product's

associated Web browser plug-ins installed to use the Screen print option in EDExpress.

If you do not have any Adobe products installed on your PC and you print a report to the Screen, EDExpress displays a warning message indicating it was unable to locate the appropriate Adobe browser plugin and offers the option of saving the report or attempting to open the report using your operating system's default viewer application.

- **Password Protection for External Export, Printing to File** – You can now apply password protection to external exports and EDExpress documents you print to a file. To use this new functionality, select **File** as the report destination, then enter the same password in the **Password** and **Verify Password** fields. EDExpress saves the password-protected file it creates in ZIP format (for external exports) or PDF format (for documents) format in the destination folder.
- **Current Date and Preview Enhancements in Query** – We updated the Current Date option in Query setup (**Tools**, **Query**) to enable you to specify a number of days, weeks, months, or years before or after the current date to include in the query results. To use this feature when querying on a date field, select Current Date in the Value section, select the plus (+) or minus (-) sign to indicate a data range after or before the current date, respectively, enter a number of measurement, then select Days, Weeks, Months, or Years as a unit of measurement.

  We also added a Preview function to Query setup. If you want to test a new query you have created, save the query, then click the new **Preview** button. If you are testing a parameter query, enter the values you want to query when prompted. EDExpress displays the records that meet the query criteria that are currently in your database.

Global

The following Global setup enhancement is available in EDExpress 2018-2019:

- **New Password Setup Enables Additional Security Requirements** – The new Password Setup feature enables you to establish default parameters and requirements for passwords you define in Security Users setup (**Tools**, **Setup**, **Global**, **Security Users**). The new password settings include minimum password length, minimum and maximum password age (measured in days), and password history length (also measured in days). You can also test passwords in this dialog box to ensure they meet the parameters and requirements you define.

  Prior to establishing new user IDs and passwords in Security Users setup, we recommend you review the Password Setup dialog box with your technical staff and determine which default parameters and requirements you want to establish for EDExpress users at your school. You should consider how often you want your staff to change their passwords (minimum/maximum password age), how frequently they can re-use the same password (password history length), and the minimum length for each new password.

Application Processing

The following enhancements are available in the EDExpress 2018-2019 Application Processing module:

ISIR Import, View, Print, File Format, and Query

- **Removal of Assumed Homeless Youth ISIR Field** – Federal Student Aid is implementing changes to the definition of "youth" for 2018-2019 as it pertains to homelessness. Students who are older than 21, but not yet 24, and who are unaccompanied and homeless or self-supporting and at risk of being homeless, now qualify as independent students. Previously, applicants who were 22 or 23 could not self-identify on the FAFSA that they are homeless, at risk of being homeless, or in a homeless circumstance. We are revising the FAFSA, FAFSA on the Web, and system edits so that applicants who are 22 or 23 can also answer questions 56, 57, and 58 on the FAFSA. This change eliminates the need for FAAs to perform dependency overrides for these students. We also no longer make assumptions that an applicant is not homeless or not at risk of homelessness because they are over 21.

  As a part of this overall effort, we removed the ISIR field Assumed Homeless Youth as Determined by HUD from all EDExpress Application Processing functionality.

- **New ISIR Flags Identify Financial Data Transferred from IRS** – We added student and parent IRS data field flags to the ISIR for 2018-2019 to assist schools and state agencies in more easily identifying student and parental financial information that was transferred to the FAFSA from the IRS Web site using the IRS Data Retrieval Tool (IRS DRT). The values for these fields indicate whether student or parent financial data was transferred from the IRS, as well as whether the data was subsequently modified. The new fields correspond to the student and parent versions of the IRA Distributions, Interest Income, IRA Payments, Untaxed Pensions, Type of Tax Return, Tax Return Filing Status, Exemptions, and Education Credits data transferred from the IRS.

  In EDExpress 2018-2019, the new data fields print on the ISIR, can be viewed on the FAA Information dialog box from the ISIR Review tab (**View**, **FAA Information**) and App Express Browse, and can be selected in queries and File Format setup.

- **New IRS Request Flag Values Identify Amended Tax Return Filings** – We updated the valid values for the student and parent IRS Request Flag fields on the ISIR to include a new value indicating if the student or parent filed an amended tax return. If the IRS indicates a student or parent filed an amended tax return, the user is not allowed to submit corrections to IRS data in FAFSA on the Web and must contact an FAA for correction assistance.

  In EDExpress 2018-2019, the new student and parent IRS Request Flag values print on the ISIR, can be viewed on the FAA Information dialog box from the ISIR Review tab (**View**, **FAA Information**) and App Express Browse, and can be selected in queries and File Format setup.

Note: See the *2018-2019 ISIR Guide* and the *2018-2019 Summary of Changes for the Application Processing System* guide, available on the FSAdownload Web site, for more detailed information on changes to the ISIR for 2018-2019.

Packaging

While no major changes have been made to the EDExpress Packaging module for 2018-2019, 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 2018 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 2017-2018 Pell Grant payment and disbursement schedules in Dear Colleague Letter GEN-16-19, posted on October 18, 2016 to the Information for Financial Aid Professionals (IFAP) Web site.

After ED's Fiscal Year 2018 Appropriation is finalized, we will update the Pell Grant Payment Schedule, if necessary, through a future release of EDExpress. If you use the EDExpress 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 EDExpress 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 EDExpress 2018-2019 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 2017-2018, your enrollment status rolls over to 2018-2019.
- 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, 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 or R2T4 on the 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 IDs (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 EDExpress 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 EDExpress. You will be prompted separately for your FSA User ID and password, which are not stored in the EDExpress database and must be provided each time you log in to FAA Access to CPS Online.

New for 2018-2019! We updated EDExpress to open the FAA Access to CPS Online Web site in a browser window outside the software when accessed from the View menu outside student records after you enter your initial login information in the FAA Access Automation Information dialog box.

New for 2018-2019! Beginning with 2018-2019 startup in October 2017, you need Internet Explorer 11 or higher to access FAA Access to CPS Online using functions or links located in EDExpress.

How to Get EDExpress and Documentation

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

EDExpress Software

Instructions for downloading EDExpress are located in the "Downloading Documentation and Software from the FSAdownload Web Site" section of the *Installation Guide for EDExpress for Windows 2018-2019*.

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:

- *EDExpress for Windows 2018-2019 Installation Guide*
- *EDExpress for Windows 2018-2019, Release 1.0 Desk Reference*
- Technical References

The 2018-2019 versions of the *EDE Technical Reference* and the *EDExpress Packaging Technical Reference* provide technical guidance and record layouts for schools or other organizations that need to interface local software or mainframe systems with EDExpress 2018-2019. The *EDExpress Packaging Technical Reference* also contains worksheets you can use to help plan and implement your Packaging module setup in EDExpress 2018-2019.

Compatibility and Compliance

Microsoft Windows Information

EDExpress 2018-2019 is only supported currently for the Microsoft Windows 7 and Windows 8 operating systems. For more information on minimal and optimal system recommendations, see the *EDExpress 2018-2019 Installation Guide* and the March 7, 2017 electronic announcement posted to the IFAP Web site.

Note: Federal Student Aid has not yet fully tested the Microsoft Corporation's Windows 10 as an operating system for its PC software products, including the EDExpress and DL Tools software. We performed limited testing with Windows 10 for EDExpress 2018-2019, Release 1.0, but we do not currently have a projected date for full 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.

Getting Help

If You Have Technical Support Questions

If you have questions regarding EDExpress 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 EDExpress 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.