

May 2018

**RE: EDEExpress for Windows 2018-2019, Release 2.0**

Dear EDEExpress Users:

Federal Student Aid is pleased to announce the availability of EDEExpress for Windows 2018-2019, 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 2018-2019 award cycle.

**Important Note:** We redesigned the EDEExpress software for 2018-2019 to implement enhancements that improve usability, increase security, and eliminate outdated functionality. See the “Overview of EDEExpress 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 EDEExpress 2018-2019, Release 2.0
- Overview of EDEExpress Redesign
- Login Information for EDEExpress 2018-2019
- Preview of EDEExpress 2018-2019, Release 3.0
- Important notices regarding:
  - Discontinuation of Master Promissory Note (MPN), MPN Manifest, and Disclosure Statement printing in Direct Loan module
  - Pell Grant payment and disbursement schedules in Release 2.0
  - Use of Additional Eligibility Indicator in Pell Grant module
- Release 2.0 software and user documentation download instructions
- 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 2018-2019 COD System, see the [March 13, 2018 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.

## **EDEExpress for Windows 2018-2019, Release 2.0 Overview**

EDEExpress 2018-2019, 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 2018-2019, Release 2.0 can be installed as an upgrade to Release 1.0 (posted in October 2017). 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 2018-2019 production database (**expres19.accb**).

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 2018-2019, 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 2018-2019 database to your system. If you have an existing 2018-2019 database, a Stand Alone Full or a Network Server/Workstation Full installation of Release 2.0 will overwrite your database and all previously entered 2018-2019 data will be lost.

For more technical guidance and information regarding the EDEExpress installation process, see the [Installation Guide for EDEExpress for Windows 2018-2019](#), 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).

## **EDEExpress 2018-2019 Redesign**

EDEExpress 2018-2019 redesign enhancements include the following:

- The EDEExpress 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 EDEExpress database and student data more secure.

- The ability to apply password protection to external export files and any documents printed from EDEExpress 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 EDEExpress.
- 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 EDEExpress Help in the software and the *EDEExpress for Windows 2018-2019, Release 2.0 Desk Reference*, which is available on the FSAdownload Web site.

## The EDEExpress Desktop

**New for 2018-2019!** The EDEExpress 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 EDEExpress. The Favorites pane provides quick access to print functionality for the documents you generate most often in EDEExpress. 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 EDEExpress 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 EDEExpress menu bar is available whether the desktop is displayed or not. Desktop settings are specific to your EDEExpress user ID.

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

### *Startup Information Pane*

The Startup Information pane of the new EDEExpress desktop replaces the Startup Information dialog box that appeared in prior versions of EDEExpress after logging into the software. The Startup Information pane displays informational messages regarding key EDEExpress 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, EDEExpress might display a message in this pane to alert you that your disk space is low or, if you are starting Release 2.0 for the first time, remind you to define your Source Entity IDs for the Direct Loan, Pell Grant, and TEACH Grant modules.

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 EDEExpress Desktop provides you with a quick shortcut to print functionality for the reports, lists, letters, and other documents you generate frequently in EDEExpress.

To designate EDEExpress 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 EDEExpress 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 EDEExpress desktop, go to **View, Desktop Settings** and click **Clear Favorites**.

### ***Pending Imports Pane***

The Pending Imports pane of the new EDEExpress Desktop lists data files in your import data directory that have yet to be imported into EDEExpress, 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, EDEExpress 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, EDEExpress 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 EDEExpress modules.

**Note:** If your import data directory is located on a network and multiple EDEExpress 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 EDEExpress 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 EDEExpress 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 EDEExpress based on the refresh rate you select in the desktop settings (**View, Desktop Settings**).

If EDEExpress 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 EDEExpress 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 EDEExpress 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 EDEExpress 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 EDEExpress 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 EDEExpress based on the refresh rate you select in the desktop settings (**View, Desktop Settings**).

If you do not want the EDEExpress 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 EDEExpress 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 EDEExpress 2018-2019**

If you upgrade from EDEExpress 2018-2019, Release 1.0 to Release 2.0, your User IDs, passwords, and other security settings are carried forward to Release 2.0 and do not need to be recreated.

If you have not installed EDEExpress 2018-2019 prior to Release 2.0, when you first access the software 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, EDEExpress 2018-2019 requires that you immediately define a new password for the SYSADMIN. Beginning with EDEExpress 2018-2019, 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. EDEExpress 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.

**New for 2018-2019!** Due to changes in minimum password requirements, user IDs and passwords established in your EDEExpress 2017-2018 Security Users setup are not pulled forward to EDEExpress 2018-2019 as part of the Prior Year Import function. You must recreate *all* user IDs and passwords in EDEExpress 2018-2019 based on the default or custom settings defined in the new Password Setup dialog box.

For more information on security setup, see EDEExpress Help in the software and the *EDEExpress for Windows 2018-2019 Installation Guide*, which is available on the FSAdownload Web site.

## **Preview of EExpress 2018-2019, Release 3.0**

In summer 2018, we will post EExpress 2018-2019, Release 3.0, which will add functionality enabling users to import and print the Pell Grant School Account Statement (SAS) and compare Pell SAS data to cash, award, and disbursement information in your EExpress database. Release 3.0 enhancements will include new cash management entry and cash detail external import options, new reports, and new abbreviated Pell award and disbursement detail external imports for non-EExpress users. Monitor the IFAP Web site for announcements regarding the availability of EExpress 2018-2019, Release 3.0 and related documentation.

## **Removal of MPN, MPN Manifest, and Disclosure Statement Printing in Direct Loan Module**

We removed all print functionality for Direct Loan Master Promissory Notes (MPNs), MPN manifests, and Disclosure Statements from EExpress 2018-2019. MPNs, MPN manifests, and Disclosure Statements must now be printed outside of EExpress using a different onsite system or completed by the borrower online at the [StudentLoans.gov](http://StudentLoans.gov) Web site.

EExpress continues to track the MPN status and other related information (such as the MPN expiration date) on Direct Loan records based on response data sent by the COD System. You can also continue to indicate whether the Disclosure Statement has been printed.

For more information and guidance on the Direct Loan MPN, MPN manifest, and Disclosure Statement, see Volume II, Section 1 of the [2018-2019 COD Technical Reference](#), which is available on the FSAdownload Web site.

## **Federal Pell Grant Payment and Disbursement Schedules in EExpress 2018-2019, Release 2.0**

Federal Student Aid announced revised 2018-2019 Pell Grant Payment and Disbursement schedules in [Dear Colleague Letter GEN-18-04](#), posted on April 10, 2018 to the IFAP Web site. These schedules replaced the original 2018-2019 Pell schedules posted on January 31, 2018.

As noted in the Dear Colleague Letter, the maximum 2018-2019 Pell Grant award for a full-time student with an Expected Family Contribution (EFC) of zero is now \$6,095, an increase of \$175 over the previous maximum of \$5,920. The maximum Pell-eligible EFC is also increased for 2018-2019 from 5328 to 5486. As a result of the EFC increase, some applicants who were initially processed by the Central Processing System (CPS) as ineligible for a 2018-2019 Pell Grant award due to their EFC are now Pell-eligible.

The CPS began processing 2018-2019 application and correction records according to the revised Pell schedules on May 20, 2018. The CPS also reprocessed 2018-2019 Institutional Student Information Records (ISIRs) on May 22, 2018 for students who applied or submitted corrections before May 20, 2018 and, under earlier formulas, were designated as not being Pell-eligible, but who are now eligible for a 2018-2019 Pell Grant under the new formulas due to their EFC.

For more information and a complete description of the changes for the 2018-2019 award year, see Dear Colleague Letter GEN-18-04 and the May 2018 electronic announcement posted to the IFAP Web site regarding implementation of the revised 2018-2019 Pell schedules.

EDEExpress 2018-2019, Release 2.0 incorporates the 2018-2019 Pell schedules into the following functionality (listed by module):

## **Global**

We updated the Pell Grant Schedule tab available under **Tools, Browse, Global** to reflect the 2018-2019 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 2018-2019 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 May 22, 2018 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 unpackaging 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-18-04. The Repackage process will update the Pell Grant awards for your Packaging records to follow the 2018-2019 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 2018-2019 Pell Grant payment and disbursement schedules.

## **Use of Additional Eligibility Indicator in Pell Grant Module**

Section 401(b)(8) of the HEA, as added by Section 310 of the Department of Education Appropriations Act, 2017, (Title III of Division H of P.L. 115-31, the Consolidated Appropriations Act, 2017) allows eligible students to receive one and one-half (or 150%) of their scheduled Pell Grant award during a single award year to accelerate completion of their program of study. This provision is effective beginning with the 2017-2018 award year. To receive the additional Pell funds, students must be otherwise Pell-eligible and enrolled at least half-time in the payment periods for which the additional funds are awarded.

The Additional Eligibility Indicator field on the Origination (Pell Grant) tab helps you identify students eligible to receive 150% of their scheduled Pell Grant award in a single award year. EDEExpress allows you to disburse up to 150% of the scheduled Pell Grant award if the Additional Eligibility Indicator is selected on the origination record.

You can select the Additional Eligibility Indicator checkbox manually on the Origination tab, use Multiple Entry to update the field, or update the field as part of a Pell Grant External Origination Add/Change import file.

If the Additional Eligibility Indicator is selected on the origination record, the Calculate Award Amount for Entire School Year process calculates 150% of the student's scheduled Pell Grant award and lists the result in the Award Amount for Entire School Year field. For example, if the student is eligible for a Pell Grant scheduled award of \$6,095 and the Additional Eligibility Indicator is selected, the Calculate Award Amount for Entire School Year process calculates an Award Amount for Entire School Year value of \$9,142.50.

For additional information on the 150% Pell Grant eligibility change, see [Dear Colleague Letter GEN-17-06](#), posted on June 19, 2017 to the IFAP Web site.

## Release 2.0 Enhancements

The following product enhancements have been incorporated into EDEExpress 2018-2019, 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 2018-2019 for the first time. For more information on the 2018-2019 enhancements to Application Processing, Packaging, and Global functionality introduced in Release 1.0, see the [EDEExpress for Windows 2018-2019, 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 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 EDEExpress.

**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](#). For more information regarding message classes used by the COD System in 2018-2019, see Volume III, Section 2 of the [2018-2019 COD Technical Reference](#). Both documents are available on the FSAdownload Web site.

- **Updated EDEExpress Icon and Splash Screen Color to Match 2018-2019 FAFSA** – The EDEExpress software's Windows icon and splash screen (which is displayed when you first start the software) have been color-coded blue 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.
- **Automatic Archival of Imported Data Files** – The EDExpress import process now archives imported data files automatically, storing the files in a compressed, password-protected ZIP file called Backup#.zip (where # is a number from 0-9 that is incremented each time the previous numbered backup file reaches 2 gigabytes or more in size). Archive files are stored in your default import data directory (as specified in File Management setup) and are accessible for applicable import types from the import dialog box of each module by clicking the **Archived File** button.

When you select the Archived File option and click the **File** button, the software displays the new Import from Archive dialog box. The left pane displays the archived file’s folder structure, which is based on import date, while the right pane displays the contents of each folder, making it easier for you to locate and import archived data.

- **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 enhancement, added originally in Release 1.0, is also available in Release 2.0:

- **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 EDEExpress 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.

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

We updated valid date ranges for the 2018-2019 award year to synchronize EDEExpress 2018-2019 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	10/1/2017 to 6/30/2019
Pell Grant Payment Period Start Date	10/1/2017 to 6/30/2019
Pell Grant Disbursement Date*	10/1/2017 to 9/30/2024*
TEACH Grant Enrollment Date, Payment Period Start Date, and Disbursement Date	On or after 1/1/2018
Direct Loan Date of Birth	1/1/1919 to 12/31/2010
Direct Loan Loan Period Begin Date	On or before 6/30/2019
Direct Loan Loan Period End Date	On or after 7/1/2018
Direct Loan Academic Year Start Date	On or before 6/30/2019
Direct Loan Academic Year End Date	On or after 7/1/2018
Direct Loan Disbursement Date (all loan types)	6/21/2015 to 12/28/2022

\* Although EDEExpress accepts any date on or after 10/1/2017, the valid 2018-2019 date range for Pell Grant disbursement records is from the date the 2018-2019 Pell schedules are posted on the IFAP Web site to 9/30/2024.

## Pell Grant Enhancements

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

### *Import*

- **Program Profile Code and Program Attendance Begin Date Relocated to Secondary Import Dialog Box** – We relocated the required Program Profile Code field and optional Program Attendance Begin Date field associated with the Origination Data–ISIRs Import Type from the initial Pell Import dialog box to the secondary dialog box that appears after you initiate an import. On the secondary dialog box (labeled “Pell Choose Select Records/Verify or Enter COD Program Reporting Data,”) you can select and apply default Program Profile Code and Program Attendance Begin Date values for each student you are importing, and then modify the values on individual records as needed.

The Program Profile Code continues to be required in EDEExpress 2018-2019 to create new Pell records. The Program Attendance Begin Date and Enrollment Status Effective Date fields are optional for the 2018-2019 Award Year and are not stored or processed by the COD System if sent.

- **Enrollment Status Effective Date Added to Secondary Import Dialog Box** – We also relocated the optional Enrollment Status Effective Date field to the Pell Choose Select Records/Verify or Enter COD Program Reporting Data dialog box that appears after you initiate an import of ISIR data into the Pell module.

### *Entry*

- **Pell Awards Now Calculated to Penny Automatically** – To ensure Pell Grant awards are calculated correctly in EDEExpress, particularly for students eligible for 150% of their scheduled award, the software now calculates all Pell Grant awards to the penny. In prior cycles, calculating Pell Grant awards to the penny was an optional feature.
- **Disbursement Date Range Expanded** – To conform with regulatory requirements, we expanded the valid disbursement date range for Pell records to allow disbursements dated as early as 10/1/2017. In prior cycles, EDEExpress did not allow addition of Pell disbursement records dated prior to January 1.
- **Enrollment Status Valid Values Revised** – We updated the valid values for the required Enrollment Status field for consistency with the Direct Loan and TEACH Grant modules. Valid values are now **F** (Full-time enrollment), **Q** (Three-quarters-time enrollment), **H** (Half-time enrollment), or **L** (Less than half-time enrollment).
- **Disbursement Action Field Added to Multiple Entry** – To help you identify how Multiple Entry will modify disbursement records you select for updates more easily, we enhanced the secondary dialog box of Pell Multiple Entry (**Process, Multiple Entry, Pell**) to add a display-only Disbursement Action field. If you select disbursement-related fields for updates, the Disbursement Action field displays either **Update**, which indicates you are updating an existing sequence number for the disbursement number selected, or **New**, which indicates you are adding a new disbursement sequence number for the disbursement number selected.

**Note:** We also added the Disbursement Action field to the Direct Loan and TEACH Grant Multiple Entry secondary dialog boxes with the same functionality and values as in Pell Multiple Entry.

## Direct Loan Enhancements

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

### *Import*

- **Program-Related Fields Relocated to Secondary Import Dialog Box** – We relocated the required Program Profile Code and Enrollment Status fields and the optional Program Attendance Begin Date field associated with the Loan Data – ISIR and Loan Data – Packaging import types from the initial Direct Loan Import dialog box to the secondary dialog box that appears after you initiate an import.

On the secondary dialog box (labeled “Direct Loan Choose Select Records/Verify or Enter COD Program Reporting Data,”) you can select and apply default values for these program-related fields for each student you are importing, and then modify the values on individual records as needed.

- **Enrollment Status Effective Date Added to Secondary Import Dialog Box** – We also relocated the optional Enrollment Status Effective Date field to the Direct Loan Choose Select Records/Verify or Enter COD Program Reporting Data dialog box for the PLUS Application Acknowledgement (CRSP190P) import type only.

### *Entry*

- **Add Loan Dialog Box Updated to Incorporate Program Profile Code, Other Program-Related Data Fields** – We updated the Add Loan dialog box (which is accessible by clicking **Record, Add** or the + sign on the toolbar from the Origination tab) to add required Program Profile Code and Enrollment Status fields and optional Enrollment Status Effective Date and Program Attendance Begin Date fields. You are now required to provide a value for the Program Profile Code field when creating new Direct Loan records in EDEExpress.

The program profile code you select must already exist in Program Profiles setup. In the Add Loan dialog box, you can click the ellipses (...) button next to the Program Profile Code field to view the Retrieve dialog box and select from a grid of available profiles established in setup. Using this function can help you more easily and quickly review the program-related data associated with each program profile.

- **End-of-Entry Edit 3911 Expanded to Include Anticipated Disbursement Amounts** – To maintain consistency with updates to COD System processing, we revised Direct Loan end-of-entry edit 3911 to trigger when the sum of anticipated and actual disbursement amounts for a loan record are greater than the Loan Amount Approved or Endorser Amount (if applicable). Previously, end-of-entry edit 3911 was only triggered if the sum of actual disbursements exceeded the Loan Amount Approved or Endorser Amount.

## TEACH Grant Enhancements

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

### *Import*

- **Program Profile Code and Program Attendance Begin Date Relocated to Secondary Import Dialog Box** – We relocated the required Program Profile Code field and optional Program Attendance Begin Date field associated with the Origination Data–ISIRs Import Type from the initial TEACH Grant Import dialog box to the secondary dialog box that appears after you initiate an import. On the secondary dialog box (labeled “TEACH Choose Select Records/Verify or Enter Program Reporting Data,”) you can select and apply default Program Profile Code and Program Attendance Begin Date values for each student you are importing, and then modify the values on individual records as needed.

The Program Profile Code continues to be required in EDEExpress 2018-2019 to create new TEACH Grant records. The Program Attendance Begin Date and Enrollment Status Effective Date fields are optional for the 2018-2019 Award Year and are not stored or processed by the COD System if sent.

- **Enrollment Status Effective Date Added to Secondary Import Dialog Box** – We also relocated the optional Enrollment Status Effective Date field to the TEACH Choose Select Records/Verify or Enter COD Program Reporting Data dialog box that appears after you initiate an import of ISIR data into the TEACH Grant module.

## How to Get EDEExpress and Documentation

You can download each EDEExpress 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).

### 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 2018-2019](#).

**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 [EDEExpress for Windows 2018-2019, 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 EDEExpress Pell Grant and Direct Loan modules.

Also, as noted earlier in this letter, the *2018-2019 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

EDEExpress 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 *EDEExpress 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 EDEExpress and DL Tools software. We performed limited testing with Windows 10 for EDEExpress 2018-2019, Release 2.0, 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. To accommodate this restriction, 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 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).

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 800/848-0978. You may also e-mail [CODSupport@ed.gov](mailto:CODSupport@ed.gov).