

# June 2014 Updates

## TECHNICAL REFERENCE CHANGE TRACKING LOG



Change(s) Made	Page(s)
<b>Volume I, Section 1 – Document Standards</b>	
Removed reference to retired Volume 6, Section 3.	I-I-4
<b>Volume II, Section 2 – Implementation Guide</b>	
Updated reference to the Common Record Layout, Volume II, Section 3.	II-1-161
<b>Volume II, Section 4– Edits</b>	
Updated block to “Award” for Edit 213.	II-4-40
<b>Volume III, Section 1 – Combination System Implementation Guide</b>	
Revised “Overview” section to add section regarding EExpress 2014-2015, Release 3.0 enhancements and associated updates to Volume III. Release 3.0 is scheduled for posting on the FSAdownload Web site in late June 2014.	III-1-3 to III-1-4
Revised “Enhancements and Changes to EExpress for 2014-2015” section to add information regarding enhancements to the Global, COD, and Direct Loan modules implemented in EExpress 2014-2015, Release 3.0. These enhancements include updates to Financial Aid Shopping Sheet functionality, new COD setup features, and extensive updates to the Direct Loan module to accommodate multiple new required origination and disbursement fields for the 2014-2015 award year.	III 1-7 to III-1-8, III-1-10 to III-1-11, and III-1-14 to III-1-19
Updated “Direct Loan Fields Required for Origination” table to list the following new Direct Loan data elements, which are all required to originate Direct Loan records for all loan types beginning in EExpress 2014-2015, Release 3.0: Published Program Length, Special Programs, Program Credential Level, Weeks Academic Program Year (with limited exceptions), CIP Code, and Enrollment Status.	III-1-22 to III-1-23
Updated “Combination System Record Layouts” section introduction to indicate that the June 2014 version of Volume III, Section 3 (Combination System Record Layouts) contains revised Direct Loan and TEACH Grant record layouts with new data elements that can be included in external add/change files you import into EExpress 2014-2015, Release 3.0. You can use these revised record layouts to build external data files that update Direct Loan and TEACH Grant records you created in EExpress 2014-2015, Release 2.0 with the new data elements required to originate or export the records using Release 3.0.	III-1-36

<p>Updated “Direct Loan External Imports” section as follows:</p> <ul style="list-style-type: none"> <li>• Added new “New 2014-2015 Fields for 150% Direct Subsidized Loan Limit” sub-section that provides tips and guidance regarding updating new 2014-2015 Direct Loan fields using external import</li> <li>• Added text to the “External Import Change” sub-section indicating that the June 2014 version of Volume III, Section 3 includes new import change field numbers for new Direct Loan origination and disbursement fields that can be used in DIEC15OP files.</li> <li>• Revised “Importing Actual Disbursement Data into EExpress” sub-section to add discussion of new required Payment Period Start Date field for all Direct Loan disbursements and to incorporate discussion of new disbursement action type values we added for adjustments to CIP Code, Enrollment Status, and Payment Period Start Date values on actual disbursements.</li> <li>• Revised “Importing Disbursement Profile Codes into EExpress” sub-section to note addition of Payment Period Start Date to Disbursement Profile Setup in EExpress 2014-2015, Release 3.0.</li> </ul>	<p>III-1-42 to III-1-45, III-1-48 to III-1-49</p>
<p>Added note to “External Exports (Pell, TEACH, and Direct Loan)” indicating that we updated File Formats Setup in EExpress 2014-2015, Release 3.0 to include new Direct Loan and TEACH Grant origination and disbursement data elements.</p>	<p>III-1-49</p>
<p>Updated “Combination System Edits” section to add note indicating new Direct Loan and TEACH Grant end-of-entry edits are available in the June 2014 version of Volume III, Section 4. We also added examples of new TEACH Grant edits (5011 and 5012) and a new Direct Loan edit (5005).</p>	<p>III-1-55, III-1-57 to III-1-58</p>
<p>Updated TEACH Grant Appendix to add new text describing TEACH Grant setup and external import enhancements implemented in EExpress 2014-2015, Release 3.0 that enable you to report the CIP Code and Enrollment Status with each anticipated or actual disbursement.</p>	<p>III-1-60 to III-1-63</p>
<p><b>Volume III, Section 2 – Combination System Message Classes</b></p>	
<p>Added message classes CRSU15OP (Direct Loan Subsidized Usage System-Generated Response) and CROF15OP (Direct Loan Origination Fee and Interest Rebate Percentage Acknowledgement) to the “COD System Message Classes Used by EExpress” section. Both file types are new for the 2014-2015 award year and update Direct Loan records in EExpress 2014-2015, Release 3.0 with corrected or updated information on the COD System.</p>	<p>III-2-4</p>
<p><b>Volume III, Section 3 – Combination System Record Layouts</b></p>	
<p>Added notes prior to the Direct Loan External Import Loan Origination Add File record layout and TEACH Grant External Data Add/Change record layout reminding you that you must upgrade to EExpress 2014-2015, Release 3.0 before you can import files formatted according to the June 2014 version of these record layouts.</p>	<p>III-3-18 and III-3-99</p>
<p>Updated the valid field content for Origination Fee Percentage (field #28) in the Direct Loan External Import Loan Origination Add File record layout to include the fee percentage values you should use for subsidized/unsubsidized and PLUS/Grad PLUS loans with a first disbursement date on or after October 1, 2014 and before October 1, 2015. For more information on these fee changes, see <a href="#">Dear Colleague Letter GEN-14-10</a>, posted to the IFAP Web site on May 2, 2014.</p> <p>We also corrected the date ranges applicable to several existing Origination Fee Percentage values in the valid field content for both subsidized/unsubsidized and Grad PLUS/PLUS records to reference the correct month or day.</p>	<p>III-3-23</p>
<p>Updated the Direct Loan External Import Loan Origination Add File record layout to add Payment Period Start Date fields associated with anticipated disbursements 1-20. Beginning with the 2014-2015 award year, you are required to report a Payment Period Start Date with each anticipated and actual disbursement sequence number. If the Payment Period Start Date is left blank in your file, EExpress uses the Payment Period Start Date from the Disbursement Profile Code, if provided.</p>	<p>III-3-29 to III-3-41</p>

<p>Updated the Direct Loan External Import Loan Origination Add File record layout to add the Program Profile Code field (field #129). We added Program Profile Setup to EExpress 2014-2015, Release 3.0 to enable you to define profiles of default values for new required Direct Loan origination fields. If you assign a Program Profile Code to a loan record in your file, EExpress updates the new Program Credential Level, Published Program Length and Units, Special Programs, and Weeks Program Academic Year fields on the loan record with the default values you defined for the Program Profile in Setup.</p>	III-3-43
<p>Updated the Direct Loan External Import Loan Origination Add File record layout to add the following new Direct Loan origination fields (as field #'s 130-135): Program Credential Level, Published Program Length, Published Program Length Units, Special Programs, Weeks Program Academic Year, and Subsidized Usage Limit Applies fields.</p>	III-3-43 to III-3-46
<p>Updated the Direct Loan External Import Loan Origination Add File record layout to add Enrollment Status (field #136) and CIP Code (field #137). Both fields are required for all anticipated and actual Direct Loan disbursement records for all loan types for the 2014-2015 award year and are required to originate loan records in EExpress 2014-2015, Release 3.0. The new Direct Loan external import fields update the Enrollment Status and CIP Code fields on the Origination (Direct Loan) tab and are used for each anticipated disbursement record. The Enrollment Status and CIP Code fields on the Disburse (Direct Loan) tab are display only and can only be modified by changing the corresponding field value on the Origination tab.</p>	III-3-46 to III-3-47
<p>As a result of adding multiple new origination and disbursement fields the Direct Loan External Import Loan Origination Add File record layout, we incremented field numbers and adjusted start/end field positions for multiple fields throughout the record layout. The total record length of the Direct Loan External Import Loan Origination Add File record layout is now 1100 bytes.</p>	Throughout and III-3-47
<p>Updated the Direct Loan Origination External Import Change Field Numbers tables (sorted by field name alphabetically and by DL change number) to add field change numbers for the following new 2014-2015 Direct Loan origination and disbursement fields: Payment Period Start Date fields associated with anticipated disbursements 1-20, Payment Period Start Date associated with an actual disbursement, CIP Code, Enrollment Status, Program Credential Level, Program Profile Code, Published Program Length, Published Program Length Unit, Special Programs, Subsidized Usage Limit Applies, and Weeks Program Academic Year.</p>	III-3-53 to III-3-78
<p>Updated valid field content for Action Type (field change #D006) in the Direct Loan Origination External Import Change Field Numbers tables (sorted by field name alphabetically and by DL change number) and Actual Disbursement Type in the Direct Loan External Export record layout to add the new values of C, T, and S. Use these action types to adjust the new CIP Code (type C), Payment Period Start Date (type T), or Enrollment Status (type S) values for an actual disbursement in a new sequence number.</p>	III-3-58, III-3-66, and III-3-96
<p>Updated the Direct Loan External Export record layout to add the following new 2014-2015 fields:</p> <ul style="list-style-type: none"> <li>• Record Type D (Loan table) fields: Academic Year Length, Actual Non Credential Teacher Certification Subsidized Usage Period*, Actual Subsidized Usage Period*, Anticipated Non Credential Teacher Certification Subsidized Usage Period*, Anticipated Subsidized Usage Period, Calculated Published Program Length Years*, CIP Code - Origination, Loan Period Length*, Maximum Subsidized Eligibility Period*, Program Credential Level, Published Program Length Months, Published Program Length Weeks, Published Program Length Years, Remaining Actual Non Cred Teacher Cert Sub Eligibility Period, Remaining Actual Sub Eligibility Period, Remaining Antic Non Credential Teacher Certification Sub Eligibility Period, Remaining Anticipated Subsidized Eligibility Period, Special Programs, Subsidized Usage Limit Applies*, Sum Actual Non Credential Teacher Certification Subsidized Usage Periods*, Sum Actual Subsidized Usage Periods*, Sum Anticipated Non Credential Teacher Certification Sub Usage Periods*, Sum Anticipated Subsidized Usage Periods*, and Weeks Program Academic Year</li> <li>• Record Type M (Actual Disbursement table) fields: Actual Disbursement CIP Code, Actual Disbursement Enrollment Status, and Actual Disbursement Payment Period Start Date</li> <li>• Record Type N (Anticipated Disbursement table) fields: Anticipated Disbursement CIP Code,</li> </ul>	III-3-86 to III-3-98

<p>Anticipated Disbursement Enrollment Status, and Anticipated Disbursement Payment Period Start Date</p> <p>* New COD-calculated field added for 2014-2015 award year</p>	
<p>Updated the TEACH Grant External Add/Change record layout to modify the valid field content and Processing Notes/Edits for Enrollment Status (field #11) and to add the CIP Code (field #32). Beginning with the 2014-2015 award year, you must provide the CIP Code and Enrollment Status associated with each anticipated or actual TEACH Grant disbursement. The CIP Code and Enrollment Status values provided on the Origination (TEACH Grant) tab determine the corresponding values displayed on the Disburse (TEACH Grant) tab for each disbursement. You must provide values for both fields to prepare a TEACH Grant origination record for export to the COD System.</p> <p>In addition to updating the existing TEACH Grant Enrollment Status field to be described as required (instead of optional, as in prior cycles), we removed the valid value of 5 (Other).</p>	<p>III-3-102 and III-3-107</p>
<p>As a result of adding the CIP Code field to the TEACH Grant External Add/Change record layout, we incremented field numbers and start/end field positions for fields subsequent to the CIP Code. The total record length of the TEACH Grant External Add/Change record layout is now 1773 bytes.</p>	<p>Throughout and III-3-143</p>
<p><b>Volume III, Section 4 – Combination System Edits</b></p>	
<p>Updated message text for Direct Loan edit 1035 to capitalize “Students”</p>	<p>III-4-10</p>
<p>Updated condition and message text for Direct Loan edit 2010 to incorporate references to new Payment Period Start Date field</p>	<p>III-4-16</p>
<p>Updated condition and message text for Direct Loan edits 3042 and 3070 to incorporate references to new disbursement types C, T, and S, which are used to adjust the CIP Code, Payment Period Start Date, and Enrollment Status values on actual disbursements in a new sequence number</p>	<p>III-4-17</p>
<p>Added Direct Loan edits 3076, 3077, and 3078. EExpress 2014-2015, Release 3.0 generates these edits when you attempt to adjust the CIP Code (3076), Payment Period Start Date (3077), or Enrollment Status (3078) on an actual disbursement to the same field value associated with the previous sequence number.</p>	<p>III-4-17 to III-4-18</p>
<p>Added Direct Loan edits 5005, 5010, 5015, 5020, 5030, and 5040. EExpress 2014-2015, Release 3.0 generates these edits if the loan record is not at an Origination Status of N (Not ready to send to COD) and the Program Credential Level (5005), Published Program Length (5010), Special Programs (5015), Weeks Program Academic Year (5020), Enrollment Status (5030), or CIP Code (5040) field is blank on the Origination (Direct Loan) tab. Additional unique conditions apply for edits 5010 and 5020.</p>	<p>III-4-20</p>
<p>Added TEACH Grant edits 5011 and 5012. EExpress 2014-2015, Release 3.0 generates these edits if the CIP Code (5011) or Enrollment Status (5012) is left blank on the Origination (TEACH Grant) tab.</p>	<p>III-4-21</p>
<p><b>Volume VII, Section 12 – OF Doc Type Example</b></p>	
<p>Updated OF system generated response example to include the response block.</p>	<p>VII-12-1</p>