**SUMMARY OF CHANGES**
**2001-2002 EDESuite**

This enclosure contains information about changes we have made to the 2001-2002 EDESuite software, including EDExpress.

The following hyperlinks take you to specific topics covered in this Action Letter. Simply click on the topic and you will jump to its location. However, we encourage you to read this entire document so you become familiar with all of the changes.

## Schedule for EDESuite Software

The following schedule displays the dates that EDESuite software will be available on the SFAdownload Web site.

| Version | Modules Included | Month of Release |
|---|---|---|
| Renewal Applications for Windows, Version 1.0 | N/A | October 2000 |
| EDExpress for Windows, Version 7.0 | Global Application Processing Packaging | December 2000 |
| Quality Analysis Tool, Version 1.0 | N/A | January 2001 |
| EDExpress for Windows, Version 7.1 | Direct Loan | February 2001 |
| EDExpress for Windows, Version 7.2 | Pell Grant | April 2001 |

You can download EDESuite software, software service releases, and related documentation from the SFAdownload Web site, http://SFAdownload.ed.gov.

## NEW! Renewal Application for Windows Software

**New for 2001-2002**: A new software product, Renewal Applications for Windows 2001-2002, Version 1.0, was released in October and is available on our SFAdownload web site.  With this software, you can:

- Submit Type 2 RAD requests,

- Import renewal application data (RAD) and Type 2 error and report files, and

- Print Renewal FAFSAs.

For more details about Renewal Applications for Windows 2001-2002, read Action Letter #2, GEN-00-13, which describes the 2001-2002 Renewal Application process. Additional information about this new product was distributed with the software.

## Enhancements to EDExpress for Windows

The 2001-2002 EDExpress for Windows includes updates to conform with annual changes to the FAFSA, the ISIR, the Direct Loan, and Pell/RFMS processes. Also, our focus groups and beta testers made valuable suggestions, which we took into account when designing this year's product. We thank all of you who have assisted us throughout the past year.

### Global – EDExpress for Windows, Version 7.0

*Setup*

- We added the ability to bring forward global security groups, IDs, document tracking setup, user-defined letter text, most queries, and demographic data (for example, name, address, phone, and current SSN) from the 2000-2001 software.

*Field Lengths*

- We included the new and modified 2001-2002 FAFSA data elements in the software. For example, the field length of Student's First Name, Permanent Address, and Local Address fields increased to match the new field lengths on the 2001-2002 FAFSA.

*Query*

- From your browser, you can view and print all available query fields by each module.

*Help Text*

- To help you identify fields quickly, we added fly-over help text in grids for drop-down list fields, such as marital status. The fly-over feature displays the description of the field when you point the mouse on a value in a drop-down box; it is similar to putting the mouse on a toolbar and seeing descriptive text. We also added hypertext that links the Help screen to the web.

### Application Processing – EDExpress for Windows, Version 7.0

*New Data Elements*

- Student's e-mail address is included on the demo, FAFSA, and SAR/ISIR tabs. You can enter and correct the e-mail address.

*List Processed ISIRs Report*

- The print dialog box includes the option to limit the list to the highest or active transactions only.

*Quick Corrections*

- We added assumption and override capabilities to the quick correction process.

### Import Edit Report

On the import dialog, you will now have the option of identifying and printing the activated transactions EFC and default status as well as incoming ISIR EFCs and default status on the Import Edit Report.

### Message Classes

- At the request of the user community, the SARR02OP and SARE02OP message classes are renamed CORR02OP and CORE02OP.

- We added a new message class, HOLD02OP. Upon import, this message class lists the records that are in the signature hold file at the CPS awaiting receipt of a signature.

### Import Dialog

- ISIR Data (SARA, EAPS, REAP, CORR, YTDO, ESFN, ESFR, and SYSG) and Error Data (FDRE, EAPR, RAPR, CORE, and SIGA) are combined into two import type options under the Import Dialog screen.

### Query

- We added a new field, ISIR Transaction Add Date, that you can query on from the Application Processing database.

### Verification Worksheet

- The Yes or No value for the difference in Tax Form Used is displayed rather than a calculated value.


## Packaging – EDExpress for Windows, Version 7.0

### Fund Maintenance

- We added the following Aid Types:

  R – Non-Need Based Grants

  D – Need-Based Direct Unsubsidized Loan

  V – Chapter 30 VA Benefits/Americorps (This aid type automatically excludes the fund as a resource when calculating eligibility for Federal Subsidized Stafford Loans)

- A new field, Do Not Remove if Unpackaged, on the Fund Maintenance setup allows you to stop a fund from being removed during Process-Unpackage or Process-Repackage.

### Awards Tab

- A new Aggregate Loan button displays the NSLDS aggregate loan information for Federal Subsidized/Unsubsidized Stafford Loans and Perkins Loans.

### *Browse*

- We added a browse table so that schools can export student awards by term to external systems.

### *Remaining Need Ranges*

- We added remaining need ranges for S = Subsidized, U = Unsubsidized, and P = PLUS.

### *Print*

- On the List-Eligible Dependent report, we removed the Less than Full-Time column from the income grid so the report matches the FISAP.

- On the List-Students by Fund Code report, we added the option to include Packaged/Not Packaged records.

- On the Award Letter, the institution code is suppressed when a user chooses to exclude the school name and address fields.

### *Entry*

- You can view totals in the Awarded Funds grid without scrolling to the bottom. You can also see the totals and detail of the awarded funds on one screen.

### *Process*

- A new document status, D = Received Not Reviewed, prevents a record from being packaged when a document has a status of 'Received Not Reviewed' and is required for packaging.

- When a fund is listed multiple times in a user-defined formula, the software includes all instances it appears in the formula when it performs the calculations. For example, if you have Grant1 = $500, Grant2 = $500 and Grant1 = $700, the user formula includes both the first and the second occurrence of Grant1, resulting in $1700 rather than $1000. In the past, the user-defined formula used only the first occurrence of the fund in the calculation.

- We allow Process-Package on a packaging record when the packaging status is N-Not Ready and the software displays the reason(s) why the record is not ready to package.

### *Multiple Entry*

- Changes to the Award Letter Received, Received Date, and Print Letter in Next Batch fields are updated only when values are provided for these fields in Multiple Entry and the Packaging Status is P= Packaged, H = Hand packaged, or M = Manually adjusted.

### *Import*

- On the External Add record layout, the last byte of the record cannot be blank.

**Direct Loan – EDExpress for Windows, Version 7.1**

*Setup*

- When creating an anticipated or an actual disbursement record, you have the option to enter the gross disbursement amount or the net disbursement amount. You indicate your school's preference in Setup.

- When the software is determining whether to print a MPN, it is necessary to know whether your school is processing using multi-year functionality of the MPN or single-year functionality.  You need to indicate your school's preference in Setup.

- The ISIR has a new NSLDS flag indicating whether a valid MPN is at the LOC. If you use multi-year functionality to process MPNs, this indicator assists in identifying whether printing a new MPN is necessary. Upon importing an ISIR, this MPN indicator is displayed on the NSLDS tab under View in EDExpress.

*E-mail Address*

- The student's e-mail address is included on the Demo tab as a 50-byte optional field. When available, the e-mail address is included on the loan record when it is sent to the LOC and is passed on to Servicing.

*ED Initiated Report Message Classes*

- Message classes for Direct Loan ED-Initiated Reports are predefined in Global Setup and do not require manual entry.

*Loan Tab*

- The Loan tab displays the source indicating how a loan record was created. For example, it could indicate that a loan record was created by importing an ISIR, importing from packaging, or manually.

*Loan Amount Requested*

- The Loan Amount Requested is a PLUS-only field and is not captured for Direct Subsidized and Unsubsidized loans. Only PLUS loan records sent to the LOC contain a Loan Amount Requested.

*Loan Entry*

- When you enter, view, or update a loan, only those fields that apply to the type of loan being entered displays. For example, when you enter a PLUS loan, the Loan Amount Requested field displays; but when you enter a Subsidized loan, the Loan Amount Requested field does not display.

- Loan Information fields are reorganized to assist with data entry. Pre-filled fields display first and are followed by fields requiring data entry.

### *Inactive Loan Flag*

- Last year, when the Inactive Loan flag was set for a loan, that loan was excluded from reports. This year, when this flag is set, the Inactive Loan flag displays a dialog box that gives you the option to reduce this loan to zero and/or block it from displaying on reports. If you select the option to reduce the loan to zero, EDExpress reduces the Loan Amount Approved and sets all anticipated disbursements to zero. You can then export a change batch and transmit it to the LOC to reduce the amounts.

- If you mark an origination loan record inactive prior to exporting to the LOC, the inactive loan record is excluded from the export batch.

### *Disbursement*

- You can flag any subsequent disbursement to be the first disbursement as long as the disbursement date is the earliest disbursement date for that loan.

### *Redefined Actual Disbursement Action Types*

You enter actual disbursements using the following newly defined action types:

- D – Disbursement (Gross or net disbursement amount)

- A – Adjustment (Gross or net adjustment amount)

- N – Net Adjustment Amount (Positive or negative)

- U – Copy Anticipated Disbursement

- Q – Disbursement Date Adjustment

## Pell Grant – EDExpress 7.2

### *General*

- We added an RFMS Origination and RFMS Disbursement status of D-Duplicate.

- We removed data elements for Special Disbursements from the Disbursement tab.

- Three new fields are included on the Disbursement tab:

  - RFMS YTD Total

  - School Cross-Reference

  - Payment Period Start Date

### *Setup*

- A new field, Ineligible Flag, is included in Pell School Setup. This is a self-reporting field and is used by schools that are declared ineligible at any time during the reporting Award Year. If the Ineligible Flag is set in the Pell School Setup, then the "Payment Period Start Date" field is required on the Disbursement tab.

*Multiple Entry*

- Separate edit checks are performed on origination fields or disbursement fields when entering data via Multiple Entry. When origination and disbursement fields are selected, origination edits are run first and disbursement edits are run last.

- Additional fields are included in the "Process | Multiple Entry | Pell" selection grid:

    - Credit/Clock Hours in Academic Program

    - Credit/Clock Hours to Complete This School Year

    - Weeks of Instructional Time Used to Calculate Payment

    - Weeks of Instructional Time in Program's Academic Year

    - Enrollment Status

    - Estimated Disbursement Date #1

    - Payment Period Start Date

*Import*

- You can update existing disbursement reference numbers via External Disbursement Add if the disbursement status is set to E-Rejected or R-Ready.

- The "Print All?" import edit report includes the following information when selecting the "Print All?" option under Import-Year-to-Date data:

    - Origination ID

    - Name

    - Accepted Award Amount for the Entire School Year

    - YTD Disbursed Amount

    - Disbursement Reference Number

    - Accepted Disbursement Amount

    - "Compare and Print Exceptions" is not available with the "Print All?" option.

*Export*

- The "Attended Campus ID" is not a required field on the Export dialog box when a data request for "Year to Date" records is submitted.

*Print*

- You can print multiple Electronic Statement of Accounts (ESOA) when more than one PGA202OP.* file is imported into the Pell software. A record selection option is also included if you want to print a specific ESOA record.

- We added predefined queries for Pell status:

  - Origination Status

  - RFMS Origination Status

  - Disbursement Status

  - RFMS Disbursement Status

*Process*

- You can run Process/Calculate and originate award amounts at the batch level. The generated report lists records that were set to an R-Ready status and records that remained at an N-Not Ready status.

## Return of Title IV Funds for Windows, Version 1.1.1

Return of Title IV Funds for Windows helps you calculate and manage the return of funds to these Title IV programs when a student withdraws:

- Subsidized and Unsubsidized Federal Stafford Loans

- Subsidized and Unsubsidized Direct Loans

- Perkins Loans

- Direct/FFEL PLUS Loans

- Federal Pell Grant

- FSEOG

- Other Title IV assistance, such as the LEAP Grant

Once you enter the student's disbursement and withdrawal information, the software calculates amounts to be returned and indicates when a postwithdrawal disbursement is due.

## Quality Analysis Tool for Windows, Version 1.0

The 2000-2001 Quality Analysis Tool for Windows (or simply, QA Tool) is a new program that replaces the Quality Assurance Program for Windows. Quality Analysis Tool is significantly different. We combined what we learned from the Quality Assurance Program for Windows with our users' comments and created a streamlined software product for analyzing 1999-2000 ISIR data.

The most important difference is that QA Tool allows you to import ISIR data from the 1999-2000 award year so that you can conduct your own institutional verification research by identifying repeatable patterns that are occurring in your student population,

rather than analyzing awards. As a result, your verification process is improved and the financial aid process is easier for students.

The software focuses on *initial* and *paid on* ISIR data. You compare these two transactions side by side to see which fields were corrected. Using EFC ranges and increments of change, you can analyze a specific student population to determine which fields were corrected most often and how those changes affected the students' EFCs.

Other ways 2000-2001 Quality Analysis Tool for Windows differs from Quality Assurance Program for Windows include:

- **Data comparison.** QA Tool uses *initial* and *paid on* ISIR transactions to analyze your sample. It shows the differences between the data elements in the two transactions side by side for comparison. You can view all fields or a group of selected fields. Demographic data also displays.

- **Data entry and Multiple entry.** QA Tool has no manual entry or multiple entry function for student data; it uses only ISIR data that you import. Only the Institution Verification flags can be updated.

- **ENAS.** QA Tool does not support ENAS functions.

- **Readings.** QA Tool does not calculate readings.

- **Import.** This function is particularly important because you import the ISIR data from your 1999-2000 Quality Assurance Program database (if you used Quality Assurance Program for Windows), your 1999-2000 EDExpress database (if you used EDExpress for Windows, Version 6.x), or an ASCII file in ISIR format. The record layout is similar to one used for Quality Assurance Program for Windows, Versions 4.x.

- **Loans.** QA Tool does not support Pell, campus-based, or multiple loans.

- **Non-ISIR data.** QA Tool does not support non-ISIR data, such as awards, disbursements, resources, documents, or enrollment.

- **Print.** You can print a variety of new reports, as well as other useful information, such as record layouts for ISIR, Full Data, and User Data exports, a list of queries, and custom reports.

- **Tabs.** The software has only two tabs: Transaction Comparison and User Database.

## References

### *Customer Service*

#### CPS Customer Support

1-800-330-5947; TDD/TTY 1-800-511-5806
Representatives are available Monday-Friday, 7 a.m. to 7 p.m. (CT).
E-mail: cps@ncs.com

#### Federal Student Aid Information Center

1-800-4-FED-AID (1-800-433-3243); TDD/TTY 1-800-730-8913
Representatives are available Monday-Friday, 8 a.m. to 8 p.m. (CT).

#### SFATECH listserv

Maintained by ED to address technical questions and issues about ED's Student
Financial Aid systems and software. For more information, see
http://www.ed.gov/offices/OSFAP/sfatech/listserv.html.

#### SFA Customer Service Call Center (CSCC)

*Formerly* Student Financial Assistance (SFA) Customer Support Inquiry Center

For Title IV program questions, application processing questions, and for
assistance contacting other ED staff: 1-800-433-7327.

Representatives are available Monday through Friday, 9 a.m. to 5 p.m. (ET).

E-mail:  SFA_Customer_Support@ed.gov

### *Documents*

The following documents detail the changes to the Application Processing System during
the 2001-2002 processing year. They are, or soon will be, posted on IFAP at
http://www.ifap.ed.gov

- Action Letter # 1, Renewal Application, July 2000

- Action Letter #2, Instructions for Submitting Renewal Application Data Requests,
  September 2000

- Action Letter describing changes to the CPS Processing System, available
  November 2000

- Action Letter describing changes to the Web application and Web processes,
  available November 2000

- 2001-2002 *EDE Technical Reference*, available November 2000

- *A Guide to ISIRs*, available November 2000

## Web Sites

You can find more information about EDESuites and other student financial aid tools and documents on the following Web sites:

**IFAP**, http://www.ifap.ed.gov

**SFA Technical Support**, http://www.ed.gov/offices/OSFAP/sfatech

**SFATECH listserv**, http://www.ed.gov/offices/OSFAP/sfatech/listserv.html

**SFAdownload**, http://SFAdownload.ed.gov

## Glossary of Acronyms

The following lists common acronyms used in this action letter.

| | |
|---|---|
| CICS | Customer Information Control System |
| CPS | Central Processing System |
| CSCC | Customer Service Call Center |
| ED | U.S. Department of Education |
| EDE | Electronic Data Exchange |
| EFC | Expected Family Contribution |
| ENAS | Estimated Needs Analysis Software |
| FAFSA | Free Application for Federal Student Aid |
| FISAP | Fiscal Operations Report and Application to Participate in the Federal Campus-based Programs |
| FSEOG | Federal Supplemental Educational Opportunity Grants |
| ID | Identification |
| IFAP | Information for Financial Aid Professionals web site |
| ISIR | Institutional Student Information Record |
| LOC | Loan Origination Center |
| MPN | Master Promissory Note |
| NSLDS | National Student Loan Data System |
| PLUS | Parents Loan for Undergraduate Students |
| QA | Quality Assurance |
| RAD | Renewal Application Data |
| RFMS | Recipient Financial Management System |
| SAR | Student Aid Report |
| SFA | Student Financial Assistance |
| SSN | Social Security Number |
| VA | Veteran Affairs |
| YTD | Year to Date |