

Overview of Direct Loan and TEACH Grant Functionality  
in Upcoming EDEExpress 2014-2015 Releases  
Attachment to March 2014 Electronic Announcement

In the sections below we describe the functions you can safely use in Release 2.0 to begin preparing your Direct Loan and TEACH Grant data, while avoiding COD System rejects. We also provide an overview of the steps you will need to take after installing Release 3.0 to finalize your Direct Loan and TEACH Grant data for processing by the COD System.

We present this information in the following order:

- Direct Loan and TEACH Grant functionality you can use in Release 2.0, including additional tips for using each module.
- Information on defining Classification of Instructional Program (CIP) Codes in Release 2.0.
- Direct Loan and TEACH Grant functionality in Release 3.0.

**Direct Loan and TEACH Grant Functionality You Can Use in Release 2.0**

While you should avoid software features involving or requiring the origination or export of Direct Loan and TEACH Grant data in Release 2.0, there are numerous other functions you can use in both modules to begin preparing your 2014-2015 student records for processing. See the bulleted lists below for more detail:

***Direct Loan Features You Can Use In Release 2.0***

- Direct Loan Setup options (under **Tools, Setup, COD**), including School setup, System setup, Disbursement setup, Tolerances setup, and MPN Printer setup.
- Direct Loan origination record creation through manual entry, ISIR import, Packaging data import, External Add import, and PLUS Application Acknowledgment (CRSP15OP) import.
- MPN and MPN manifest printing (PLUS and Grad PLUS loan types only).
- Direct Loan Multiple Entry and External Change import (to modify origination record field values).
- Direct Loan reports, such as the Origination Record and List-Loans.
- Direct Loan Query setup and use with importing, printing, and other functions.
- Direct Loan File Format setup (**Tools, File Formats, Direct Loan**) and External Loan Data export (to extract origination data from your database for use in an external system).
- Direct Loan Browse (**Tools, Browse, Direct Loan**).

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***Additional Tips for Using the Release 2.0 Direct Loan Module***

- When completing COD System setup, do not select the “Combine Module(s)” checkboxes. You may also want to leave the DL row for Source Entity ID field blank. This will help avoid the possibility of exporting records to the COD Common Record format.
- Direct Loan origination records should be considered “on hold” until Release 3.0 after you have created and saved the records on the Origination (Direct Loan) tab or imported data successfully from another module or an external source.
- Direct Loan origination records imported from the Packaging module or using an External Add file may be originated automatically as part of the import. If this occurs, you should still consider the records on hold until you install Release 3.0; do not export the records using Release 2.0.
- Do not click the \$ button on the toolbar or click **Process, Originate** from the Origination (Direct Loan) tab for loan records you have created.
- If you use Direct Loan Multiple Entry in Release 2.0 to modify loan origination records you created, do not select the “Originate?” field (row 16).
- EDEXpress 2014-2015 requires that subsidized and unsubsidized loans be originated before you can print an MPN. As noted earlier in this message, you should not originate or export Direct Loan records until you have upgraded to Release 3.0. You should therefore also defer performing any MPN-related tasks for subsidized or unsubsidized loans in EDEXpress until you install Release 3.0. You may want to direct your subsidized and unsubsidized loan borrowers to complete an electronic MPN (eMPN) on the StudentLoans.gov Web site in the interim.

**Note:** You can disregard MPN Response files (message class CRPN15OP) you receive prior to installing Release 3.0 and originating your loan records. These response files will most likely correspond to eMPNs submitted by your students online. When you originate and submit the corresponding loan records to the COD System after upgrading to Release 3.0, the COD System will link the loans to the eMPNs that your students submitted previously online.

***TEACH Grant Features You Can Use in Release 2.0***

- TEACH Grant Setup options (under **Tools, Setup, COD**), including School setup, System setup, and Disbursements setup.
- TEACH Grant origination record creation through manual entry, ISIR import, Packaging data import, or External Add import.
- TEACH Grant Multiple Entry and External Add/Change import (to modify origination record field values).

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- TEACH Grant reports, such as the Origination Record and Origination List.
- TEACH Grant Query setup and use with importing, printing, and other functions.
- TEACH Grant File Format setup (**Tools, File Formats, TEACH**) and External Export (to extract origination data from your database for use in an external system).
- TEACH Grant Browse (**Tools, Browse, TEACH**).

***Additional Tips for Using the Release 2.0 TEACH Grant Module***

- The existing, **optional** Enrollment Status field will become a **required** data element for TEACH Grant records beginning with Release 3.0. When defining your TEACH Grant School setup in Release 2.0, consider providing a default value for the Enrollment Status field. Doing so may save you time later when you are preparing your TEACH Grant records for processing using Release 3.0.

**Note:** Do not choose the Enrollment Status value of **5** (Other) as your default value in Release 2.0; we are removing this value in Release 3.0.

- When completing COD System setup, do not select the “Combine Module(s)” checkboxes. You may also want to leave the TEACH row for Source Entity ID field blank. This will help avoid the possibility of exporting records to the COD Common Record format.
- When importing Packaging data or external data to create or modify TEACH Grant records, leave the “Include Records in Next Document Submission?” checkbox cleared on the import dialog box.
- TEACH Grant origination records should be considered “on hold” until Release 3.0 after you create and save the records on the Origination (TEACH Grant) tab or import data successfully from another module or an external source. When saving records on the Origination tab, if you receive the prompt “Select record ready to send to COD Processor?”, you should select **No**.
- If you use TEACH Grant Multiple Entry in Release 2.0 to modify origination records you created, do not select the “Set Origination Ready to Export” field (row 7).

***Defining CIP Codes in Release 2.0***

Release 2.0 will add a new COD setup option (under **Tools, Setup, COD**) that enables you to define Classification of Instructional Program (CIP) Code values and descriptions. The CIP Code, which is a six-digit code representing the student’s college major, is **optional** in EDEExpress 2014-2015 for Pell Grant records and is not required or processed by the COD System for Pell Grant records for the 2014-2015 Award Year; however, EDEExpress Direct Loan and TEACH Grant users **must** provide a CIP Code value on each anticipated and actual

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disbursement beginning with the 2014-2015 Award Year. Release 3.0 will add the required CIP Code field to the Direct Loan and TEACH Grant modules.

You may want to begin defining CIP Codes in Release 2.0 for later use on Direct Loan and TEACH Grant records. After you install Release 3.0, you will be able to use the CIP Codes you define in the new setup dialog box with Direct Loan and TEACH Grant records, as well as Pell Grant records.

We will provide additional guidance regarding Release 2.0 enhancements and the limited use of the Direct Loan and TEACH Grant modules in Release 2.0 in the *EDEExpress for Windows 2014-2015, Release 2.0 Cover Letter* and the *EDEExpress for Windows 2014-2015, Release 2.0 Desk Reference*, both of which will be posted to the Federal Student Aid Download (FSAdownload) Web site along with the Release 2.0 software in April 2014.

### **Direct Loan and TEACH Grant Functionality in Release 3.0**

EDEExpress 2014-2015, Release 3.0 will implement multiple enhancements, including new data reporting requirements specific to the 150% Direct Subsidized Loan Limit.

To address the new data reporting requirements, we are adding multiple new origination and disbursement data elements to setup, entry, import, export, and other functions in the Direct Loan module in Release 3.0. Some of these new data elements must be provided on all loan types as part of the 2014-2015 Common Record you submit to the COD System for processing; other data elements are calculated values that the COD System will return to you in Common Record Response files.

The COD System will require new data elements for TEACH Grant disbursement records in 2014-2015 as well, including the Enrollment Status and CIP Code. These additional data elements will also be included in the TEACH Grant module in Release 3.0.

After you install Release 3.0, you will need to update Direct Loan and TEACH Grant records you created in Release 2.0 to prepare them for origination and/or export. These updates will include:

- Modifying Direct Loan disbursement profile codes in setup to include **Payment Period Start Date**, a new required data element for all Direct Loan disbursement records.
- Adding **CIP Code and Enrollment Status** values to all Direct Loan and TEACH Grant origination records.

**Note:** The CIP Code and Enrollment Status values provided on the Direct Loan and TEACH Grant **Origination** tabs will govern the values used on the disbursement records for both modules. For a preview of this functionality, examine the optional new CIP Code functionality we are adding for the Pell Grant module in Release 2.0.

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Direct Loan users will also be required to provide values for multiple new fields as part of the origination record. These new fields will be located on a **new sub-tab labeled Usage Limit Applies Info**, which will be accessible from the upper right corner of the Origination (Direct Loan) tab. To minimize data entry effort for Direct Loan users, we are adding a new COD setup option called Program Profile Setup, which will allow you to define default values for these new fields for different student populations. When you assign a Program Profile Code to a Direct Loan record in Release 3.0, the new fields on the sub-tab will be updated automatically with the values you defined in setup. You will also have the option of updating the new Direct Loan fields manually on the Origination tab, by using Direct Loan Multiple Entry, or by importing a Direct Loan external add or external change files.

**Important Note:** If you plan to use the Direct Loan or TEACH Grant external import feature in Release 2.0 to add origination data from an external system, be aware that we will be publishing updated record layouts for both imports in an updated version of the *2014-2015 COD Technical Reference*, Volume III, later this spring, prior to posting Release 3.0. You will need to update the format of your external files to match the revised record layouts before you can import them into Release 3.0.

After all required data elements have been updated on your Direct Loan and TEACH Grant records in Release 3.0, you will be able to originate and/or export the records to the COD System and resume normal processing routines.

We will provide additional guidance regarding Release 3.0 enhancements and the steps you will need to take to prepare Direct Loan and TEACH Grant records for processing in the *EDEExpress for Windows 2014-2015, Release 3.0 Cover Letter* and an updated version of the *EDEExpress for Windows 2014-2015, Release 2.0 Desk Reference*, both of which will be posted to the FSAdownload Web site along with the Release 3.0 software in June 2014.