
School Electronic Process Guide

FAA Access to CPS Online
Return of Title IV Funds
ISIR Analysis Tool
EDESuite

2007-2008

U.S. Department of Education



F E D E R A L
S T U D E N T A I D

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Overview

Preface

The *School Electronic Process Guide* is designed to meet the reference needs of financial aid administrators (FAAs), programmers, and data processing staff. In this guide, we describe the following updates and enhancements for the 2007-2008 processing cycle:

- Schedules
- Message Classes
- What's New for FAA Access to CPS Online
 - Return of Title IV Funds (R2T4) on the Web
 - ISIR Analysis Tool
- What's New for EDESuite
 - EDEExpress for Windows, Release 1.0 – Global functionality and Application Processing (App Express) and Packaging modules
 - EDEExpress for Windows, Release 2.0 – Pell (including Academic Competitiveness Grant, or ACG, and National SMART Grant) and Direct Loan modules
 - Direct Loan (DL) Tools for Windows, Release 7.0
 - Student Status Confirmation Report (SSCR) for Windows
- Software and Hardware Requirements

We recommend you review all of the information provided in this guide related to the products and services you use.

Major Changes

The following major changes are implemented for the 2007-2008 processing cycle:

- **Annual Changes.** EDESuite 2007-2008 software products conform to annual changes to the Free Application for Federal Student Aid (FAFSA), Institutional Student Information Record (ISIR), Federal Student Aid PIN, Direct Loan, Pell (including ACG and National SMART Grant), and the Common Origination and Disbursement (COD) System processes. Annual changes have also been implemented on the FAA Access to CPS Online Web site.
- **PC Software, Web Application, and Processing System Enhancements Related to the HERA.** Federal Student Aid continues to implement modifications and enhancements to its PC software, Web sites, and data processing systems to address provisions of the Higher Education Reconciliation Act of 2005 (the HERA), Pub. L. 109-171. Some 2007-2008 changes related to the HERA build upon or modify other HERA-related changes implemented for the 2006-2007 cycle. See the section titled “The Higher Education Reconciliation Act of 2005 (the HERA)” and other product-specific sections in this guide for more information.
- **Enhanced “Look and Feel” for Federal Student Aid Web Sites.** We updated the “common look and feel” of FAFSA on the Web, FAA Access to CPS Online, the PIN Web site, and the ISIR Analysis Tool Web site to enhance user navigation and to more clearly indicate to users that they are viewing official Federal Student Aid sites. These changes, which include modifications to the color scheme, toolbar options, and standard labels on various Web pages, will eventually be applied to all Federal Student Aid Web sites.

The Higher Education Reconciliation Act of 2005 (the HERA)

During the 2007-2008 processing cycle, Federal Student Aid will continue to implement enhancements and modifications to its PC software, Web sites, and data processing systems related to provisions of the Higher Education Reconciliation Act of 2005 (the HERA), Pub. L. 109-171.

The major 2007-2008 changes related to the HERA that are discussed in this guide include:

- New and revised FAFSA and SAR/ISIR fields related to need analysis changes that affect the simplified needs test (SNT) and the automatic zero expected family contribution (EFC)
- New dependency status question added for active-duty military status
- Additional EExpress functionality for:
 - The Academic Competitiveness Grant (ACG)
 - The National Science and Mathematics Access to Retain Talent Grant (National SMART Grant)
 - The Federal Direct PLUS Loan for Graduate or Professional Students (identified in EExpress as “Grad PLUS loans”)
 - Revised Direct Loan Subsidized and Unsubsidized loan limits and origination fees
- Additional criteria added to FAA Access to CPS Online for ACG self-identification process

The subsequent sections of this guide include more detail about 2007-2008 changes related to the HERA. You can also find information and guidance regarding Federal Student Aid’s implementation of the HERA on the Information for Financial Aid Professionals (IFAP) Web site, located at ifap.ed.gov. See the [Higher Education Reconciliation Act of 2005 \(HERA\) Information](#) link on the IFAP home page.

Extensible Markup Language (XML) ISIR Implementation

As explained in [Dear Colleague Letter GEN-06-01](#), posted to the IFAP Web site (ifap.ed.gov) on February 15, 2006, Federal Student Aid will not implement the XML ISIR for 2007-2008. Federal Student Aid remains committed to XML as an effective tool to meet the current and future business needs of Federal Student Aid, schools, and the community. In addition, we realize that a large benefit of XML is the creation and adoption of a community-based XML standard. However, we are not able to implement the XML ISIR in 2007-2008 without significant impact to schools and other users.

XML technology is the foundation for the shared services outlined in the Federal Student Aid Data Strategy Initiative. The XML Registry and Repository for the Education Community, available at fsaxmlregistry.ed.gov, houses all XML schema related to the Standards Forum for Education.

Watch for further information on the revised implementation schedule. Federal Student Aid is fully committed to community standards, which benefit everyone in the financial aid community. We look forward to the continuation of this endeavor.

Schedules

School Electronic Product Release Schedule

The following schedule provides expected release dates for 2007-2008 FAA Access to CPS Online, the 2007-2008 version of the ISIR Analysis Tool Web application, and the 2007-2008 EDESuite PC software.

The ISIR Analysis Tool is accessible through the FAA Main Menu of the FAA Access to CPS Online Web site (fafsa.ed.gov/FOTWWebApp/faa/faa.jsp) and from the View menu in EDEExpress for Windows 2007-2008.

You can download EDESuite software and the related user documentation from the U.S. Department of Education's (ED's) Federal Student Aid Download (FSAdownload) Web site, located at fsadownload.ed.gov.

Product	Modules/Functionality Included	Expected Release
FAA Access to CPS Online	<ul style="list-style-type: none">• Student Inquiry<ul style="list-style-type: none">– ISIR Compare– FAA Standalone Signature• Application/Correction/Verification Tool Entry<ul style="list-style-type: none">– Save/Restore functionality• ISIR Request• ISIR Analysis Tool (available February 2007)• Return of Title IV Funds (R2T4)	January 1, 2007 Central Processing System (CPS) begins 2007-2008 processing on January 2, 2007.

School Electronic Product Release Schedule (Continued)

Product	Modules/Functionality Included	Expected Release
ISIR Analysis Tool 2007-2008	<p>The ISIR Analysis Tool Web site is designed for any school that wants to review and analyze its ISIR data and better understand certain characteristics about its Title IV applicant population and verification—either federally selected or defined by the institution.</p> <p>The ISIR Analysis Tool Web site enables schools to:</p> <ul style="list-style-type: none"> • Retrieve ISIR data from the datamart directly into the tool by creating flat ASCII files of Social Security Numbers (SSNs) • Draw sample aid recipient data easily by using the random sample functionality built directly into the tool • Run predefined analytic reports and create ad-hoc reports 	February 2007
EExpress for Windows 2007-2008, Release 1.0	<ul style="list-style-type: none"> • Global functionality • Application Processing module • Packaging module 	January 2007
EExpress for Windows 2007-2008, Release 2.0	<ul style="list-style-type: none"> • Direct Loan module • Pell module (including ACG and National SMART Grant functionality) 	April 2007

School Electronic Product Release Schedule (Continued)

Product	Modules/Functionality Included	Expected Release
Direct Loan (DL) Tools, Release 7.0	<ul style="list-style-type: none"> • Compare the School Account Statement (SAS) report loan/disbursement data to loans and actual disbursements recorded in EDEExpress or an external file, and/or compare the SAS report cash data to the DL Tools cash database • Print the SAS in a readable format • Track cash receipts and refunds of cash using the Cash Management utility • Rebuild your Direct Loan origination and disbursement records in EDEExpress using an automated process 	July 2007

Message Classes

2007-2008 ISIR Message Classes

The following table displays the ISIR data message classes used by the Central Processing System (CPS) for the 2007-2008 award cycle. For a complete listing of message classes used by the CPS for application processing, see Section 4 of the *2007-2008 EDE Technical Reference*.

ISIR Type	Message Class	Description
Daily	IGCO08OP	Daily ISIRs that are the result of correction records submitted by your school
Daily	IDAP08OP	Daily ISIRs that are the result of application records submitted by your school
Daily	IDSA08OP	Daily automatic ISIRs that are generated for all schools listed on the record except the school that submitted the application or correction Note: If you receive an ISIR in this message class, another school or the student created the transaction and your school code was listed.
Daily	IDRE08OP	Daily ISIRs for State Agency residents
Daily	IDNR08OP	Daily ISIRs for State Agency non-residents

2007-2008 ISIR Message Classes (Continued)

ISIR Type	Message Class	Description
CPS Pushed	IGAA08OP	<p>Daily automatic ISIRs resulting from students self-identifying their Academic Competitiveness Grant (ACG) eligibility</p> <p>Note: The IGAA message class was added in July 2006 as part of 2006-2007 CPS updates for the HERA. An ISIR is only sent under the IGAA message class if ACG self-identification results are the sole change to the prior ISIR transaction for the student.</p>
CPS Pushed	IGSG08OP	<p>Pushed ISIRs generated for all schools listed on the record that are a result of system-generated processing by the CPS</p> <p>Note: IGSG files are sent to schools when new transactions are system-generated by the CPS for circumstances such as reprocessing, NSLDS post-screening, or Department of Homeland Security (DHS) automated secondary confirmation.</p>
CPS Pushed	IGSA08OP	Pushed automatic ISIRs that are generated for all schools listed on the record except the school that submitted the correction
CPS Pushed	IGRE08OP	Pushed ISIRs for State Agency residents
CPS Pushed	IGNR08OP	Pushed ISIRs for State Agency non-residents
Requested	ISRF08OP	ISIRs requested directly from the ISIR Datamart
Errors	EAPR08OP	Error records from processing of application data
Errors	CORE08OP	Error records from processing of correction data
Errors	SIGA08OP	Error records from processing of signature records

2007-2008 ISIR Message Classes (Continued)

ISIR Type	Message Class	Description
ACG Data File	ED2008OP	<p>The ACG Data File contains ACG self-identification responses submitted by students on FAFSA on the Web or by calling the Federal Student Aid Information Center (FSAIC), or submitted by schools on FAA Access to CPS Online.</p> <p>Note: When a student or school answers the ACG eligibility questions online on an initial application, a transaction is generated and the ISIR is sent to the schools listed on the application under the message class IDAP08OP or IDSA08OP. An ISIR is automatically pushed to the school when a student supplies data for only the ACG eligibility questions on a transaction other than the initial FAFSA. If only the ACG eligibility questions are answered, the ISIR will be included in the IGAA08OP message class. If the student corrected other fields on the record in addition to answering the ACG eligibility questions, schools will continue to receive that student's ISIR in the IGSA08OP or IDSA08OP message class. The ISIR will contain at least two of the ACG comment codes (268-271), which will inform the school of the student's responses to the rigorous secondary school program questions. In addition, the applicant's ACG self-identification data is sent to the schools listed on or added to the ISIR in the ED2008OP message class.</p> <p>The ED2008OP file can be imported and printed in EDExpress using the ED-Initiated Import Report feature. The data is not stored in the EDExpress database.</p>

2007-2008 COD Message Classes

The following table displays the Common Origination and Disbursement (COD) System's export, import, and report message classes used by the EDEExpress for Windows 2007-2008, Release 2.0 software.

You can also choose to receive data from the COD System in 2007-2008 message classes that do not include academic cycle indicators. Schools with third-party or mainframe systems interested in using non-cycle-specific COD System message classes should review the *2007-2008 COD Technical Reference, Volume II, Section 2*, available on FSAdownload Web site, located at fsadownload.ed.gov.

Type	Program Affected	Message Class	Description
Export	Pell, ACG, National SMART Grant, and Direct Loan	CRAA08IN	Common Record Document sent to the COD System
Export	Pell	PGRQ08IN	Pell Grant Data Request sent to the COD System
Export	ACG	AGRQ08IN	ACG Data Request sent to the COD System
Export	National SMART Grant	SGRQ08IN	National SMART Grant Data Request sent to the COD System
Import	Pell, ACG, National SMART Grant, and Direct Loan	CRAA08OP	Common Record Response sent by the COD System
Import	Pell, ACG, National SMART Grant, and Direct Loan	CRRC08OP	Common Record Receipt sent by the COD System

2007-2008 COD Message Classes (Continued)

Type	Program Affected	Message Class	Description
Import	Pell, ACG, National SMART Grant, and Direct Loan	CRWB08OP	COD Web-Generated Response (generated by activity on the COD Web site)
Import	Pell, ACG, and National SMART Grant	CRND08OP	Grant Negative Disbursements (COD system-generated)
Import	Direct Loan	CRBN08OP	Direct Loan Booking Notification (COD system-generated)
Import	Direct Loan	CRCO08OP	Direct Loan Credit Decision Override Response (COD system-generated)
Import	Direct Loan	CRPS08OP	Direct Loan Payment to Servicing (COD system-generated)
Import	Direct Loan	CRPN08OP	Direct Loan MPN Response (COD system-generated)
Report	Pell	PGRA08OP	Pell Grant Data Request Response
Report	ACG	AGRA08OP	ACG Data Request Response
Report	National SMART Grant	SGRA08OP	National SMART Grant Data Request Response
Report	Pell	PGAS08OP	Pell Grant Electronic Statement of Account (ESOA)
Report	ACG	AGAS08OP	ACG ESOA

2007-2008 COD Message Classes (Continued)

Type	Program Affected	Message Class	Description
Report	National SMART Grant	SGAS08OP	National SMART Grant ESOA
Report	Pell	PGMR08OP	Pell Grant Multiple Reporting Record (MRR)
Report	ACG	AGMR08OP	ACG MRR
Report	National SMART Grant	SGMR08OP	National SMART Grant MRR
Report	Pell	PGRC08OP	Pell Grant Reconciliation Report
Report	ACG	AGRC08OP	ACG Reconciliation Report
Report	National SMART Grant	SGRC08OP	National SMART Grant Reconciliation Report
Report	Pell	PGYR08OP	Pell Grant Year-to-Date Record
Report	ACG	AGYR08OP	ACG Year-to-Date Record
Report	National SMART Grant	SGYR08OP	National SMART Grant Year-to-Date Record
Report	Pell, ACG, and National SMART Grant	PGSN08OP	SSN/Name/Date of Birth Change Report (preformatted)
Report	Pell	PGTX08OP	Pell Grant Text File
Report	ACG	AGTX08OP	ACG Text File

2007-2008 COD Message Classes (Continued)

Type	Program Affected	Message Class	Description
Report	National SMART Grant	SGTX08OP	National SMART Grant Text File
Report	Pell	PGPD08OP	Pell Grant Pending Disbursement Report (preformatted)
Report	ACG	AGPD08OP	ACG Pending Disbursement Report (preformatted)
Report	National SMART Grant	SGPD08OP	National SMART Grant Pending Disbursement Report (preformatted)
Report	Pell	PGFD08OP	Pell Grant Funded Disbursement Report (preformatted)
Report	Pell	PGVR08OP	Pell Grant Verification Status Report (preformatted)
Report	Pell	PGPR08OP	Pell Grant Potential Overaward Process (POP) Report
Report	Direct Loan	MPNDISOP	MPN Discharge Report (preformatted)*
Report	Direct Loan	MPNINAOP	Expired MPN Report (preformatted)*
Report	Direct Loan	MPNEXPOP	MPNs Due to Expire Report (preformatted)*
Report	Direct Loan	CODRBFOP	Direct Loan Rebuild File (must be imported into DL Tools Release 7.0 software)
Report	Direct Loan	DSDF08OP	Direct Loan School Account Statement (SAS) – Disbursement Detail (must be imported into DL Tools Release 7.0 software)

2007-2008 COD Message Classes (Continued)

Type	Program Affected	Message Class	Description
Report	Direct Loan	DSLFF08OP	Direct Loan School Account Statement (SAS) – Loan Detail – Loan Level (must be imported into DL Tools Release 7.0 software)
Report	Direct Loan	DIAA08OP	Direct Loan Pending Disbursement List (preformatted)*
Report	Direct Loan	DIAO08OP	Direct Loan Funded Disbursement List (preformatted)*
Report	Direct Loan	DIWR08OP	Direct Loan 30 Day Warning Report (preformatted)*
Report	Direct Loan	DECF08OP	Direct Loan Entrance Counseling Results from Servicing Web site
Report	Direct Loan	DLFF08OP	Direct Loan Exit Counseling Results from Servicing Web site
Report	Direct Loan	ED0408OP	Direct Loan Delinquent Borrowers Report (preformatted)*
Report	Direct Loan	INACPFOP	Direct Loan Inactive Loan Report
Report	Direct Loan	DUPLPFOP	Direct Loan Duplicate Student Borrower Report
Report	Direct Loan	SNDCPFOP	Direct Loan SSN/Name/Date of Birth Change Report

***Important Note:** EDEExpress for Windows 2007-2008 will only import the fixed-length preformatted versions of these COD System-generated reports.

What's New for FAA Access to CPS Online?

Overview

This section describes changes and enhancements to the 2007-2008 FAA Access to CPS Online Web site, including the following areas:

- Enrollment for FAA Access to CPS Online
- Enhancements to FAA Access to CPS Online
- Return of Title IV Funds (R2T4) on the Web
- ISIR Analysis Tool on the Web
- Demonstration Site

Enrollment for FAA Access to CPS Online

To ensure your school can take full advantage of 2007-2008 enhancements at the beginning of the processing cycle, the 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 2006-2007, your enrollment status rolls over to 2007-2008.
- If your school is not enrolled, your school's DPA can complete the enrollment for FAA Access to CPS Online site services for your school through the Student Aid Internet Gateway (SAIG) Enrollment Web site, located at:

fsawebenroll.ed.gov

Enhancements to FAA Access to CPS Online

General Enhancements

For the 2007-2008 processing cycle, one major general enhancement was made to FAA Access to CPS Online:

- **Enhanced “Look and Feel.”** We updated the “common look and feel” of the FAA Access to CPS Online Web site to enhance user navigation and to more clearly indicate to users that they are viewing an official Federal Student Aid site. These changes, which include modifications to the color scheme, toolbar options, and labels, will eventually be applied to all Federal Student Aid Web sites.

Application (FAFSA/Renewal/Correction) Entry

For the 2007-2008 processing cycle, several enhancements were made to Application, Renewal, and Correction Entry through FAA Access to CPS Online:

- **Enhanced Criteria for Academic Competitiveness Grant (ACG) Self-Identification Process.** As in the 2006-2007 version of FAA Access to CPS Online, schools can submit ACG self-identification data as part of the Application Entry process. The option to provide responses to the ACG self-identification questions, which prompt the user to indicate the qualifying rigorous secondary school program the student completed, is presented if the student is:
 - a U.S. Citizen
 - eligible for a Federal Pell Grant
 - a first or second year undergraduate student
 - 21 years of age or younger

Note: The last two criteria (first or second year undergraduate student and 21 years of age or younger) are new for 2007-2008. These additional criteria were added to improve the self-identification process for 2007-2008 by narrowing the criteria for allowing a student to respond to the ACG questions. This will increase the likelihood that we will provide ACG data to schools for students who meet the basic ACG eligibility requirements.

- **Enhancements Related to Paper FAFSA Changes.** FAA Access to CPS Online was updated to address modifications to the 2007-2008 paper FAFSA. The Web changes are listed below.
 - **New Active-Duty Military Status Dependency Question.** We added a new dependency question to identify applicants serving on active duty in the U.S. Armed Forces for purposes other than training. Applicants meeting this criteria are considered to be independent for purposes of receiving federal student aid. This change went into effect during the 2006-2007 award year, but the new question was not added to the 2006-2007 FAFSA. Instead, financial aid offices were instructed to perform a dependency override on the student’s record in 2006-2007 if the student met the new criteria to be considered independent. For 2007-2008, you should not perform a dependency override; instead, the student should answer this question appropriately. The new Web question reads “Is Student on Active Duty in U.S. Armed Forces?”
 - **Student Loan and Work-Study Questions Combined.** To reduce the number of questions on the paper FAFSA, we combined the “Interested in Student Loans?” and “Interested in Work-Study?” questions. The new combined question reads “Interested in Work-Study or Student Loans?” You will be able to select 1-Work-Study, 2-Student Loans, 3-Both, 4-None, or 5-Don’t Know. Because the two questions are now combined into one, the answer to this question will not be pre-filled on the 2007-2008 renewal application.
 - **Enrollment Status Question Relocated.** Based on comments and feedback from the financial aid professional community, we moved the enrollment status question to immediately follow the grade level question on the 2007-2008 application entry screens.
 - **Means-tested Federal Benefit Program Questions for Students and Parents.** As a result of the HERA, ten new means-tested federal benefit program questions for base year 2006 were added to the 2007-2008 FAFSA. The new questions (for the parent and for the independent student) ask whether anyone in the household (as defined on the FAFSA) received benefits from any of five means-tested federal benefit programs in 2006. A parent/student who received such a benefit and has an income at a certain level may qualify for a simplified EFC calculation, also known as the simplified needs test (SNT) or an automatic zero EFC. You must select the checkbox next to each question for which the student responds with a “Yes.” The questions are:
 - Student/Parents Received Supplemental Security Income?
 - Student/Parents Received Food Stamps?
 - Student/Parents Received Free/Reduced Price Lunch?
 - Student/Parents Received TANF?
 - Student/Parents Received WIC?

In correction entry, to change a “No” answer to “Yes,” select the checkbox for the field in question. To change a “Yes” answer to “No,” select **Correct to blank** in the far right column. If the responses to these questions should remain unchanged, no action is required.

- **Modified the Question Numbering for the School and Housing Codes.** The Web application still accommodates six Federal School Codes and six Housing Plan codes on a single transaction even though the paper application only has space for four school and housing codes. As a result of this difference, we modified the question numbering for these fields. The six school and housing codes fall under question 97 as sub-questions 97a through 97l. Questions 97i through 97l can only be answered online.
- **Schools Blocked from Adding New School Codes or Accessing Transactions Resulting from an FAA Adjustment (Professional Judgment).** To prevent schools from accessing transactions that contain a professional judgment (PJ) by another school, we have blocked a school’s ability to view or correct a transaction that contains an FAA Adjustment flag set by another school. In addition, although you can still access a transaction that contains an FAA Adjustment flag set by your school, you will receive a message indicating that you may not add Federal School Codes to that transaction.
- **New or Enhanced Warning Edits for 2007-2008** – Listed below are the changes to the Web warning edits for the 2007-2008 cycle. Warning edits on the Web are classified as either verifiable edits or “soft” edits. A verifiable edit can be bypassed if the information is verified by the user, and the resulting transaction will not display the corresponding comment code or highlight flag(s). A “soft” edit allows the user to bypass the edit if the information is verified as correct, but the resulting transaction will display the comment code and highlight flag(s).
 - **Verifiable Warning Edits** – We added new verifiable warning edits to the FAA Access to CPS Online forms when the record meets the following conditions:
 - **Dependent Parents’ AGI Equal to the Student’s AGI** – The student’s Adjusted Gross Income (AGI) is equal to the parents’ AGI. This warning edit already existed at the CPS for 2006-2007, and transactions that met these conditions displayed a comment directing the student to double check these fields. However, this edit is now verifiable online, so Web filers can suppress the comment code by verifying that the data entered is correct.
 - **Dependent Student’s Value for Worksheet A is Equal to the Parents’ Value for Worksheet A** – The dependent student’s total from Worksheet A is equal to the total from the parents’ Worksheet A.
 - **Dependent Student’s AGI is Equal to the Value for Worksheet A** – The dependent student’s AGI is equal to the total from Worksheet A and the values are both positive.

- **Soft Warning Edits** – When a record meets the following conditions, a soft warning edit is flagged and the applicant is returned to the questions to verify the data entered:

- The number of family members for an independent student is equal to two, the student’s marital status is married, and the student answered Yes to one of the following questions:
 - Do you have children who receive more than half of their support from you?
 - Do you have dependents (other than your children or spouse) who live with you and who receive more than half of their support from you, now and through June 30, 2007?

This warning edit already existed at the CPS for 2006-2007, however this edit is now a soft warning edit on the Web. In 2006-2007, a comment code was added to the student’s SAR directing the student to double check these fields.

- The number of family members for an independent student is greater than two, the student’s marital status is married, and the student answered No to both of the following questions:
 - Do you have children who receive more than half of their support from you?
 - Do you have dependents (other than your children or spouse) who live with you and who receive more than half of their support from you, now and through June 30, 2007?

This warning edit already existed at the CPS for 2006-2007, however this edit is now a soft warning edit on the Web. In 2006-2007, a comment code was added to the student’s SAR directing the student to double check these fields.

- The student’s response to the federal SSI benefits question equals Yes, the total from Worksheet A is zero or blank, and the automatic zero EFC conditions are not met. The edit also occurs if the parents’ response to the federal SSI benefits question equals Yes, the total from the parents’ Worksheet A is zero or blank, and the automatic zero EFC conditions are not met.
- The student’s response to the federal TANF benefits question equals Yes, the total from Worksheet A is zero or blank, and the automatic zero EFC conditions are not met. The edit also occurs if the parents’ response to the federal TANF benefits question equals Yes, the total from the parents’ Worksheet A is zero or blank, and the automatic zero EFC conditions are not met.
- The student’s tax return status is will not file, and the income and spouse’s income (depending on the marital status) is over the minimum amount required for filing a tax return. The minimum amount required for filing a tax return is different depending on the student’s marital status and the number of family members in the student’s household.

- The parents' tax return status is will not file, and the father's income and/or mother's income (depending on the marital status) is over the minimum amount required for filing a tax return. The minimum amount required for filing a tax return is different depending on whether the parents are married, single, divorced, or widowed.

Student Inquiry Enhancements

Starting with the 2007-2008 cycle, the FAA Access to CPS Online Web site offers the following additional changes:

- **Preparer's Social Security Number (SSN) Masked on Student Inquiry and the eSAR.** For security purposes, when a Preparer's SSN is present on an application, Student Inquiry and the eSAR display "REPORTED" for the value. In addition, the Echo Document masks the first five digits of a preparer's SSN instead of displaying the entire number.
- **Expanded Text for Required Fields Left Blank.** "(BLANK) DATA IS REQUIRED" displays in Student Inquiry and on the eSAR when a required field on a processed transaction is blank. If the field is blank and not required, no text displays.

Return of Title IV Funds (R2T4) on the Web

R2T4 on the Web is a non-year-specific application developed to calculate the earned and unearned portion of Title IV program assistance in accordance with section 484B of the Higher Education Act.

In August 2006, Federal Student Aid released an updated version of R2T4 on the Web to implement changes to R2T4 calculations resulting from provisions of the Higher Education Reconciliation Act of 2005 (the HERA) Pub. L. 109-171. No further updates related to the HERA are planned for R2T4 on the Web at this time.

As a result of the HERA provisions, R2T4 and Post-Withdrawal disbursement worksheets now differ for students who withdrew from a school before July 1, 2006 versus students who withdraw on or after July 1, 2006.

R2T4 on the Web is accessible through the FAA Main Menu of the FAA Access to CPS Online Web site (fafsa.ed.gov/FOTWebApp/faa/faa.jsp) and from the View menu in EDEXpress for Windows 2007-2008.

General Functionality

The following functionality is available on R2T4 on the Web:

- **The Home Page.** R2T4 on the Web's home page is designed to provide you with a quick overview of the site's functionality and capabilities. Help links provide additional detailed information on R2T4 issues.
- **Navigation.** The left navigation bar links enable you to move quickly and intuitively through R2T4 on the Web. Links included are: Institutional Charges, School Calendar, Student Record Status, Create New Record, Find Existing Record, User-Specified Fields, Reports, and Data Export.
- **Institutional Charges.** R2T4 on the Web requires that you first establish Institutional Charges and School Calendar Profile codes before creating student records. Institutional Charges codes are created to track various combinations of tuition and fees, room, board, and other fees by academic program. We recommend that you enter charges that apply to the majority of your students. If necessary, you can modify the charges within an individual student's record.
- **School Calendar.** Define your school's calendar by academic program using the School Calendar Profile (SCP) setup page. SCP is used to calculate the number of days or hours in a program's payment period or period of enrollment. An Institutional Charges code must be associated with each SCP.

- **Student Record Status.** The Notification Tracking Status page of R2T4 on the Web is designed to give users a method to track student records at various stages in the R2T4 process and enables you to quickly view, monitor, and update those records. Tracking pages available include:
 - **Student Notification.** This status page tracks the date you notify each student of a Title IV grant overpayment or the number of days you have left to notify the student.
 - **Student Repayment Arrangements – Not Completed and Student Repayment Arrangements – Completed.** These two status pages track whether the student has made arrangements to repay funds, the type of repayment arrangement and the date the repayment arrangement is made, or the number of days the student has left to respond to your notification that he or she must take positive action to resolve the Title IV grant overpayment.
 - **School Portion of Title IV Funds To Be Returned and School Portion of Title IV Funds Returned.** These two status pages track whether the school has returned its portion of the unearned funds, the date, or the number of days the school has left to return the funds it is responsible to repay.
 - **Students with a Post-Withdrawal Disbursement.** This status page tracks the number of days the school has to notify the student, when the school has received a response from the student, and the date a post-withdrawal disbursement is completed.
 - **Student Records Referred to ED.** This status page tracks the students referred to ED and the date the school referred them to ED.
- **Create New Record.** New student records are easily created in R2T4 on the Web. You must first enter the student’s SSN to create a demographic page for the student—you can also provide the student’s name, address, and other demographic information on this page (although it is not required). You can then add an R2T4 worksheet for the student by providing the student’s withdrawal date, award year, and school calendar profile. Based upon the information you submit, either the pre-HERA R2T4 worksheet and calculation (for students who withdrew before July 1, 2006) or the revised, HERA-compliant R2T4 worksheet and calculation (for students who withdrew on or after July 1, 2006) is used.
- **Find Existing Record.** A link on the left navigation bar enables you to locate existing student records easily. You can search for records by SSN or last name.
- **User-Specified Fields.** Five predefined fields (GPA, Major, Repayment Status, Withdrawal Reason, and Leave of Absence Reason) commonly used by schools are provided by default on the Web site. In addition, you can create up to ten user-specified fields to gather and track student data specific to your school. The ten additional user-specified fields can be formatted to collect data in numeric, string (text), date, or Boolean (yes/no) format.

- **Reports.** Six reports are available in R2T4 on the Web:
 - **Student Listing.** This report lists all the student records in your database by withdrawal date, withdrawal reason, last name, and SSN.
 - **Student Notification.** This report lists students who owe a Title IV grant overpayment greater than the regulatory de minimus amount (which is calculated differently for pre- and post-HERA R2T4 worksheets). Students appear on this report regardless of their Repayment Arrangement Type.
 - **Student Repayment Arrangements.** Students who have to repay their overpayment amounts appear on this report.
 - **School Portion of R2T4 Returned.** This report lists students for whom the school has returned or must return an unearned portion of Title IV funds.
 - **Students with a Post-Withdrawal Disbursement.** This report lists student records in your database with post-withdrawal disbursements at a complete or an incomplete status.
 - **Student Records Referred to ED.** Students appear on this report if their Repayment Arrangement Type is one of the following:
 - **3** (Make satisfactory repayment arrangements with ED)
 - **4** (No satisfactory arrangement made)
 - **5** (Made arrangements, but did not comply with arrangements)
 - Blank and more than 45 days have elapsed since the school notified the student that a Return of Title IV funds is required
- **Data Export.** The Data Export feature enables you to download your R2T4 on the Web student data by using a comma-delimited text file or by displaying data on a viewable Web page using the Browse Data option.
- **Student Record Tabs.** Each student record contains six tabs that organize, calculate, and store data:
 - **Overview Tab.** Provides high-level information on the R2T4 records you have created for a particular student, including the last date you modified a particular section of the record. You can print a summary report of the student's R2T4 records from this tab.
 - **Demographic Tab.** Documents the student's name, DOB, address, phone numbers, and other general student information.

- **R2T4 Tab.** Calculates the student and school repayment obligations automatically using established federal rules and regulations. You can print the R2T4 Worksheet in Adobe Acrobat format from this tab.

Note: The pre-HERA R2T4 worksheet displays if the student withdrew before July 1, 2006. The revised, HERA-compliant R2T4 worksheet displays if the student withdrew on or after July 1, 2006.

- **Post-Withdrawal Disbursement Worksheet Tab.** Enables you to view, track, calculate, update, and print post-withdrawal disbursement amounts.

Note: The pre-HERA Post-Withdrawal Disbursement worksheet displays if the student withdrew before July 1, 2006. The revised, HERA-compliant Post-Withdrawal Disbursement worksheet displays if the student withdrew on or after July 1, 2006.

- **Notes Tab.** Enables you to document information about the student, including withdrawal information or other data you want to track.
- **User Data Tab.** Enables you to enter data in user-specified fields you have created, or in the five predefined fields (GPA, Major, Repayment Status, Withdrawal Reason, and Leave of Absence Reason) provided by default on the Web site.

- **Help and Federal Student Aid Links.** All pages display a link to the R2T4 on the Web Welcome page, R2T4 on the Web Online Help and Frequently Asked Questions, and the FSA Schools Portal (fsa4schools.ed.gov).

Additional R2T4 Changes Related to the HERA

The following additional changes related to the HERA have been implemented on the R2T4 on the Web site:

- The R2T4 and Post-Withdrawal tabs for students with a withdrawal date on or after July 1, 2006 display new entry fields for tracking award data for the Academic Competitiveness Grant (ACG), National Science and Mathematics Access to Retain Talent Grant (National SMART Grant), and Graduate and Professional Student PLUS Loan (Grad PLUS) award data. We also updated R2T4 reports and the Data Export feature to include ACG, National SMART Grant, and Grad PLUS data when it is present on the student's record.
- The R2T4 tab for clock-hour students with a withdrawal date on or after July 1, 2006 automatically calculates the percentage of Title IV aid earned based on scheduled hours rather than allowing a choice between scheduled or completed hours.
- The R2T4 tab automatically calculates the Title IV grant protection amount in Step 9, Box T to 50% of the total amount of Title IV grants that were disbursed or could have been disbursed to the student. The R2T4 tab displays Step 9 calculations when the View Printable Page option or the R2T4 Tab is selected for a student who has a withdrawal date of July 1, 2006 or later.

- The R2T4 tab for students with a withdrawal date on or after July 1, 2006 automatically calculates the de minimis student repayment obligation amount for each Title IV grant. A student with a withdrawal date on or after July 1, 2006 is not responsible for returning funds to any Title IV grant programs to which the student owes \$50 or less.

Note: If the amount of Title IV owed by the student is \$50 or less for any of grant programs, it will be shown in the View mode on the R2T4 tab as well as on the R2T4 report. Remember, a school should NOT report a student owing \$50 or less to any Title IV grant program to NSLDS, nor refer him or her to Federal Student Aid’s Student Management Collections (ED Collections), nor attempt to collect on Title IV grant overpayments of \$50 or less.

- The HERA provides that schools must now contact borrowers and receive affirmative responses before making post-withdrawal disbursements of loan funds. New data edits covering this HERA provision have been added to the Post-Withdrawal tab for students with withdrawal dates on or after July 1, 2006.
- The HERA increases the deadline that schools have to return funds to ED (or to FFEL lenders for FFEL funds) from 30 to 45 days from the date of the school’s determination that the student withdrew. The “Days Remaining” calculations on R2T4 on the Web’s School Portion of Title IV Funds To Be Returned and School Portion of Title IV Funds Returned status tracking pages are now calculated using the 45-day rule for student records with a withdrawal date on or after July 1, 2006. The 30-day calculation rule will continue to be followed for student records with withdrawal dates before July 1, 2006.

For additional information and guidance regarding enhanced R2T4 on the Web functionality related to the HERA, access the R2T4 on the Web site, click the **FAQ** button at the top of the home page, and select the FAQ titled “What updates have been made to R2T4 on the Web to ensure compliance with the Higher Education Reconciliation Act (the HERA) of 2005, Pub. L. 109-171?”

Enrollment for R2T4 on the Web

Your staff members must be enrolled for both FAA Access to CPS Online and Return of Title IV Funds specifically to access the R2T4 on the Web site. The destination point administrator (DPA) or secondary destination point administrator (SDPA) of the TG number currently used by your school to send and receive FAFSAs and ISIR corrections has access to the FAA Access to CPS Online Web by default and can add or modify rights. The DPA or SDPA will need to enroll financial aid staff members for access to FAA Access to CPS Online and the R2T4 on the Web sites.

You can easily sign up financial aid staff members for FAA Access to CPS Online and R2T4 on the Web on the SAIG Enrollment Web site, located at:

fsawebenroll.ed.gov

Signature pages are *not* required for FAA Access to CPS Online or R2T4 on the Web enrollment.

ISIR Analysis Tool

The ISIR Analysis Tool Web application is designed for any school that wants to review and analyze its ISIR data and better understand certain characteristics about its Title IV applicant population and verification process (either selected by ED or defined by the school).

The ISIR Analysis Tool is accessible through the FAA Main Menu of the FAA Access to CPS Online Web site (fafsa.ed.gov/FOTWebApp/faa/faa.jsp).

Note: Using the ISIR Analysis Tool does not necessarily mean that your school is in the Quality Assurance (QA) Program or is exempt from federal verification requirements. To have these benefits, you must have a signed QA Amendment to your Title IV Program Participation Agreement (PPA).

General Functionality

You can use the ISIR Analysis Tool to:

- Request specific Initial and Paid On ISIR transactions using a basic text flat file. The requested ISIR transactions are loaded from the ISIR Datamart into your ISIR Analysis Tool database. The Initial and Paid On ISIR transaction requests can be submitted at the same time or individually.

Note: ISIR comment codes are not included with the ISIR data added to your ISIR Analysis Tool database.

- Request that the ISIR Analysis Tool application select a random sample of students from a flat ASCII file (including SSNs) provided by your school. After the sample is selected, the ISIR Analysis Tool loads the students' ISIR transactions from the ISIR Datamart into the ISIR Analysis Tool database to be used for analysis. The Initial and Paid On ISIR transactions can be loaded at the same time using built-in business logic (for example, lowest transaction as of a processed date). In addition, the school can request that ISIR Analysis Tool load both Initial and Paid On transactions from the sample or request them individually.
- Define and complete user-specified fields to track data specific to your school.
- Set the School Verification Flag to indicate students meeting your school's institutional verification criteria.
- Run the Data Validation process to identify student records missing both an initial and paid-on ISIR transaction and perform other calculations to finalize your overall ISIR sample before generating reports.

- Generate standard reports that are used for in-depth analysis based on discrepancies or trends identified in requested ISIR data. QA participants can share standard report templates with other schools using the ISIR Analysis Tool.

Note: You can apply criteria to standard reports based on specific ISIR and user-specified field data to filter report output to specific student populations.

- Create ad-hoc reports that can be used to conduct additional analysis unique to your school's user data and student demographics.

Note: All ad-hoc reports display the total number of records on the report in the footer.

- Export a flat file listing of all student records in your ISIR Analysis Tool database to your SAIG mailbox.

Note: The ISIR Analysis Tool displays the total number of records exported at the conclusion of the export process to provide you with an indication of the number of records you will receive in the file.

2007-2008 Enhancements to the ISIR Analysis Tool

The 2007-2008 version of the ISIR Analysis Tool will be available in February 2007 and will include the following enhancements:

- **Enhanced “Common Look and Feel” for the ISIR Analysis Tool Web Site.** Federal Student Aid updated the “common look and feel” of such Web sites as FAFSA on the Web and FAA Access to CPS Online (including the ISIR Analysis Tool) to enhance user navigation and to more clearly indicate to users that they are viewing an official Federal Student Aid site. These changes, which include modifications to the color scheme, toolbar options, and standard labels on various Web pages, will eventually be applied to all Federal Student Aid Web sites.

Note: The “common look and feel” changes did not affect the appearance or functionality of the ISIR Analysis Tool Dashboard page.

- **2007-2008 Year References and Message Classes Added.** We updated all ISIR Analysis Tool Web site labels and other text to reference the 2007-2008 cycle. We also updated the message class for Export files listing all student records in your ISIR Analysis Tool database to IATX08OP.

- **New 2007-2008 ISIR Data Elements Added to the ISIR Analysis Tool Database.** Eleven new fields were added to the 2007-2008 ISIR as a result of the Higher Education Reconciliation Act of 2005 (the HERA), Pub. L. 109-171. These fields will be added to your 2007-2008 ISIR Analysis Tool database as a result of ISIR Data Requests you submit. The new 2007-2008 ISIR fields added are:
 - Active-Duty Military Status
 - Student’s Supplemental Security Income
 - Student’s Food Stamps
 - Student’s Free/Reduced Price Lunch
 - Student’s TANF
 - Student’s WIC
 - Parents’ Supplemental Security Income
 - Parents’ Food Stamps
 - Parents’ Free/Reduced Price Lunch
 - Parents’ TANF
 - Parents’ WIC

Enrollment for the ISIR Analysis Tool

Your staff members will need to be enrolled for both FAA Access to CPS Online and the ISIR Analysis Tool specifically to access the ISIR Analysis Tool Web site. The destination point administrator (DPA) or secondary destination point administrator (SDPA) of the TG number currently used by your school to send and receive FAFSAs and ISIR corrections has access to the FAA Access to CPS Online Web site by default and can add or modify rights. The DPA or SDPA will need to enroll financial aid staff members for access to the FAA Access to CPS Online and the ISIR Analysis Tool Web sites.

You can easily sign up financial aid staff members for FAA Access to CPS Online and the ISIR Analysis Tool on the SAIG Enrollment Web site, located at:

fsawebenroll.ed.gov

Signature pages are *not* required for FAA Access to CPS Online or ISIR Analysis Tool enrollment.

Demonstration Site

The demonstration site can be used as a training tool for you and your financial aid staff and will be available for use at fafsademo.test.ed.gov beginning December 3, 2006.

User Name: eddemo

Password: fafsatest

Note: The user name and password fields are case-sensitive.

The demonstration Web site offers most of the features of the production versions of the FAFSA on the Web and FAA Access to CPS Online Web sites.

Notes:

- Actual personal identifying information should never be used on this demonstration site.
- No data is processed by the CPS. An estimated EFC is not calculated after an application is submitted. The EFC value is always 99999 for any test case on the demonstration site.
- The site provides preloaded test data and FAA login information.
- Saved data and submitted data are cleared from the database each evening.
- Printed signature pages include a “test sample” watermark and should not be mailed to the processor. The sample signature page is not accepted or processed.

What's New for EDESuite?

Overview

The following sections describe the major 2007-2008 cycle changes in the EDESuite software:

- EDEXpress Release 1.0—Global functionality and the Application Processing and Packaging modules
- EDEXpress Release 2.0—Pell (including ACG and National SMART Grant functionality) and Direct Loan modules
- DL Tools
- SSCR

Note: If you are using EDEXpress for Windows for the first time in the 2007-2008 award year, review “Enrollment Requirements and Training for New EDEXpress Users” later in this section.

Enhancements to EDESuite Products Related to the HERA

During the 2007-2008 cycle, Federal Student Aid will continue to implement enhancements to the EDESuite PC software related to provisions of the Higher Education Reconciliation Act of 2005 (the HERA), Pub. L. 109-171. These enhancements will build upon or modify changes implemented for the HERA in the 2006-2007 versions of EDESuite PC software.

Enhancement releases were developed and posted for the EDEXpress 2006-2007 and DL Tools software to add functionality related to two new Title IV grant programs established by the HERA—the Academic Competitiveness Grant (ACG) and the National Science and Mathematics Access to Retain Talent Grant (National SMART Grant)—and to modify existing Direct Loan functionality to allow processing of the Federal Direct PLUS Loan for graduate or professional students (as Grad PLUS loans).

Note: The HERA provides for eligible graduate or professional students to receive Direct PLUS Loans on or after July 1, 2006. The HERA provision does not create a new loan program, but rather, allows a new type of borrower—an eligible graduate or professional student—to borrow under the existing Direct PLUS Loan Program. In EDEExpress 2007-2008, a Direct PLUS loan for a graduate or professional student is referred to as a “Grad PLUS” loan.

Also as a result of the HERA, some of the annual loan limits in the Direct Stafford Loan Program are increased. The EDEExpress 2007-2008 Packaging and Direct Loan modules will be modified to accommodate these new loan limits. For additional details on loan limit increases related to the HERA, see [Dear Colleague Letter GEN-06-02](#), posted on the Information for Financial Aid Professionals (IFAP) Web site, located at ifap.ed.gov, on March 10, 2006.

Note: The higher loan limits apply to loans first disbursed on or after July 1, 2007. The COD System will use the date of the earliest anticipated disbursement (DRI = False) if there are no actual disbursements (DRI = True) when determining the appropriate loan limits to apply. The COD System will use the earliest actual disbursement, if both actuals and anticipated disbursements exist for a loan, when determining the appropriate loan limits to apply.

We updated EDEExpress help topics available in online help for 2007-2008 that provide detailed information and guidance on EDEExpress changes related to the HERA. The topics, which were originally added in EDEExpress 2006-2007, are titled “Academic Competitiveness Grant (ACG),” “National Science and Mathematics Access to Retain Talent (SMART) Grant,” “Graduate and Professional Student PLUS Loan (Grad PLUS),” and “Other HERA Changes Overview.” The topics can be accessed by clicking **Help, Help Topics** from the EDEExpress menu bar, selecting the **Index** tab, and typing the name of the topic you want to view.

Additional EDEExpress 2007-2008 and DL Tools enhancements related to the HERA, including the addition of ISIR fields and updates to Direct Loan origination fees, are detailed in the “EDEExpress – Release 1.0,” “EDEExpress – Release 2.0,” and “Direct Loan (DL) Tools” subsections later in this guide.

EDESuite Products and Section 508 Compliancy

To comply with Section 508 of the Rehabilitation Act, all EDESuite 2007-2008 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. If the change is made to a field that is shaded yellow, the “-C” text will replace the “-R” text after the label.
- All software grids display “floating” text descriptions of the contents of grid cells when cells are selected. The text appears one cell above (or below, if the first cell is selected) the selected cell. The text lists Row number, Column title, and (if applicable) the current Value. Clicking once in a cell, or using the Tab key or arrow keys to move to a cell, displays the text. Clicking a second time, or using the Tab key or arrow keys to move from a cell, hides the text.

Floating text is always enabled for the SYSADMIN user ID and always appears on the Startup Information dialog box. For all user IDs other than SYSADMIN, floating text is disabled by default. To enable it, select the **Enable 508 Grid Functionality?** checkbox on the Security Users dialog box. To disable the floating text, go to **Tools, Setup, Security Users** and create a new user ID and password. Exit the software, and then log back in with your new user ID and password.

Note: Users will always see the “-R” and “-C” labels added to software fields.

Enrollment Requirements and Training for New EExpress Users

To exchange data with the CPS or the COD System, users must enroll for these services. If not currently enrolled, you must enroll yourself and your staff for 2007-2008 access rights to the FAA Access to CPS Online Web site and as a participant with the COD System for the Pell program, the Direct Loan program, or both.

If you were enrolled with the COD System as a participant in either Pell or Direct Loan for the 2006-2007 award year, your enrollment for that specific program only is automatically rolled over for the 2007-2008 award year. If you were enrolled with the COD System for both programs in 2006-2007, enrollment for both programs will be rolled over for 2007-2008.

- To enroll as a participant on the FAA Access to CPS Online Web site, visit the SAIG Enrollment Web site located at:

fsawebenroll.ed.gov

- To enroll as a participant with the COD System, contact COD School Relations at 800/474-7268 (for Pell, ACG, and the National SMART Grant) or 800/848-0978 (for Direct Loan), through e-mail at CODsupport@acs-inc.com, or visit the COD Web site, located at:

cod.ed.gov

We also encourage new EDEExpress users to visit Federal Student Aid's Training for Financial Aid Professionals (T-FAP) Web site. The T-FAP Web site offers a complete list of current and future training activities and learning resources provided by Federal Student Aid, including a Web-based tutorial in EDEExpress Basics (also currently available at ifap.ed.gov/edexpress). This self-paced training course walks the user through basic skills required to access and navigate the EDEExpress and EDconnect software; beginning users can learn basic functionality and practice using the software in a simulated environment.

For more information, visit the T-FAP Web site, located at:

ed.gov/offices/OSFAP/training

Lastly, new EDEExpress users should review user documentation posted to the FSAdownload Web site (located at fsadownload.ed.gov) with each software release. User documentation includes the EDEExpress desk references, cover letters, and installation guide. These documents provide important information about each software release and step-by-step guidance on basic and advanced EDEExpress functionality.

New EDEExpress Pell, ACG, National SMART Grant, and Direct Loan users may also want to review the *2007-2008 COD Technical Reference*, which is also available on the FSAdownload Web site.

EDExpress – Release 1.0

This section of the *School Electronic Process Guide* describes enhancements to EDExpress for Windows 2007-2008, Release 1.0. Release 1.0, available January 2007, contains the Application Processing and Packaging modules, as well as Global functionality applicable across all EDExpress modules.

Global

The following enhancements have been made to EDExpress 2007-2008 Global functionality (applicable to all EDExpress releases and modules):

General

- **Cycle References and Message Classes Updated for 2007-2008.** We updated software labels, online help, reports, and other functionality throughout EDExpress to reference the 2007-2008 cycle. Message classes with cycle indicators are also updated for 2007-2008 in File Management (**Tools, Setup, Global, File Management**) and on various Import and Export dialog boxes throughout EDExpress.
- **HERA Overview Help Topics Updated for 2007-2008.** We updated help topics available in Global, Application Processing, Packaging, and Query online help for 2007-2008 that provide detailed information and guidance on EDExpress changes related to the HERA. The topics, which were originally added in EDExpress 2006-2007, are titled “Academic Competitiveness Grant (ACG),” “National Science and Mathematics Access to Retain Talent (SMART) Grant,” “Graduate and Professional Student PLUS Loan (Grad PLUS),” and “Other HERA Changes Overview.” The topics can be accessed by clicking **Help, Help Topics** from the EDExpress menu bar, selecting the **Index** tab, and typing the name of the topic you want to view.

Prior Year Import

- **Global Setup Field Added to Prior Year Import:** Prior Year User-Defined Queries, Setup, and File Formats Import now imports values for the Global Security Users setup field “Enable 508 Grid Functionality?” from the prior year’s EDExpress database.

Other Imports

- **Updated ED-Initiated Import Message Class for ACG Data File.** The 2007-2008 version of the ACG Data File (message class **ED2008OP**) can be imported and printed using the EDEExpress Global ED-initiated Import function. The ACG Data File contains ACG student self-identification data entered on FAFSA on the Web or FAA Access to CPS Online, or by calling the Federal Student Aid Information Center (FSAIC), which can be used as part of eligibility determination and verification procedures. The report is print-only, and the data is not stored in the EDEExpress database. You can define the ACG Data File message class in **Tools, Setup, Global, ED Initiated Imports**; while this step is not required, it will allow you to locate ACG Data Files you've received more quickly for importing. A record layout for the ACG Data File is available in Section 3 of the *2007-2008 Electronic Data Exchange (EDE) Technical Reference*, available on the FSAdownload Web site, located at fsadownload.ed.gov.

Note: Due to a limitation in the number of comment codes that can be assigned to a given ISIR transaction, ACG-related comment codes may not always appear on the ISIR for ACG-eligible students. Be sure to check ACG Data Files (ED2008OP) for additional ACG eligibility information.

Application Processing

The following enhancements have been made to the EDEExpress for Windows 2007-2008, Release 1.0 Application Processing module:

ISIR View, Print, and Query

- **New Dependency Status Question Related to the HERA Added to 2007-2008 ISIR View, Print, and Query Functionality.** As a result of the HERA, a new dependency status question indicating active-duty U.S. military status has been added to the 2007-2008 ISIR and is available in EDEExpress Application Processing view, print, and query functionality. The new ISIR data element added for 2007-2008 is labeled "Are you on active duty in U.S. Armed Forces?"
- **Means-Tested Federal Benefit Program Fields Added to 2007-2008 ISIR View, Print, and Query Functionality.** As a result of changes to need analysis in the HERA, ten means-tested federal benefit program data elements have been added as 2007-2008 ISIR fields and are available in EDEExpress Application Processing view, print, and query functionality. A parent or student who receives any of these federal benefits and who has an income at a certain level may qualify for the simplified needs test (SNT) or an automatic zero EFC. The new ISIR fields added for 2007-2008 are:
 - Parent Supplemental Security Income Benefits
 - Parent Food Stamp Benefits

- Parent Free or Reduced Price School Lunch Benefits
 - Parent TANF Benefits
 - Parent WIC Benefits
 - Student Supplemental Security Income Benefits
 - Student Food Stamp Benefits
 - Student Free or Reduced Price School Lunch Benefits
 - Student TANF Benefits
 - Student WIC Benefits
- **Student Interest in Work-Study/Loans Now Indicated in Consolidated 2007-2008 ISIR Field.** The 2006-2007 ISIR questions “In addition to grants, are you interested in student loans (which you must pay back)?” and “In addition to grants, are you interested in ‘work-study’ (which you earn through work)?” have been combined into a single question for 2007-2008 labeled “Interested in Work-Study or Student Loans?” Valid answers to the new question are: **1** = Work-Study, **2** = Student Loans, **3** = Both, **4** = Neither, and **5** = Don’t Know. This new field is available in EExpress Application Processing view, print, and query functionality.
 - **Enrollment Status Question Relocated.** The enrollment status question has been moved to display and print following the grade level question on the 2007-2008 ISIR report and on the ISIR Review tab.

Note: See *The 2007-2008 ISIR Guide*, available at fsadownload.ed.gov, for more detailed information on changes to the ISIR for 2007-2008.

NSLDS View and Print

- **NSLDS Data for ACG, National SMART Grant, and Grad PLUS Added to View, Print Functionality.** EExpress now displays and prints NSLDS data for ACG, National SMART Grant, and Grad PLUS awards that are included in the NSLDS section of the 2007-2008 ISIR. You can view or print the NSLDS data on the ISIR and NSLDS reports (**File, Print, App Express**) or view the data from any EExpress entry tab by selecting **View, NSLDS**.
- **Field Length for Three NSLDS Data Elements Increased.** The length of the three fields used to store the NSLDS data element “% Scheduled Award Used” has been increased from five bytes to seven bytes. EExpress now imports, displays, and prints the fields as seven bytes.

Packaging

The following enhancements have been made to the EDEExpress for Windows 2007-2008, Release 1.0 Packaging module:

Import

- **Import Logic Added for New ISIR Field Indicating Student Interest in Work-Study/Loans.** The 2006-2007 ISIR questions “In addition to grants, are you interested in student loans (which you must pay back)?” and “In addition to grants, are you interested in “work-study” (which you earn through work)?” have been combined into a single question for 2007-2008 labeled “Interested in Work-Study or Student Loans?” When a packaging award record is created by importing ISIR data into the Packaging module, EDEExpress selects the Interested In: Employment and Interested In: Student Loans checkboxes on the Awards tab based on the ISIR value for this new field using the following logic:
 - The Interested in: Employment checkbox is selected if the answer is **1** (Work-Study) or **3** (Both)
 - The Interested in: Student Loan checkbox is selected if the answer is **2** (Student Loans) or **3** (Both)
 - Neither checkbox is selected if the answer is **4** (Neither), **5** (Don’t Know), or blank

Entry

- **Awards Tab Fields for Interested in Employment/Student Loans Added to Packaging Multiple Entry.** The Awards tab fields Interested In: Employment and Interested In: Student Loan can now be updated using Packaging Multiple Entry.

Package/Repackage Process

- **Package/Repackage Process Modified to Award Subsidized and Unsubsidized Loans at Higher Loan Limits Established by the HERA.** The EDEExpress Package/Repackage process has been modified to award all subsidized (Aid Type **S**) and unsubsidized (Aid Type **U** for non-need based or **D** for need based) loans at the higher loan limits established by the HERA. EDEExpress Packaging users can also increase subsidized and unsubsidized awards manually to the new limits on Packaging records at any time. For loan limit increase details, see [Dear Colleague Letter GEN-06-02](#), posted to ifap.ed.gov on March 10, 2006.

EExpress – Release 2.0

This section of the School Electronic Process Guide describes enhancements to EExpress for Windows 2007-2008, Release 2.0. Release 2.0, available April 2007, adds the 2007-2008 Pell and Direct Loan modules.

Note: The Pell module includes origination and disbursement functionality for the ACG and the National SMART Grant. Grad PLUS loan functionality is part of the Direct Loan module.

A section for new EExpress Release 2.0 users immediately follows this section.

Overall Enhancements

We have implemented enhancements affecting both the Pell (including ACG and National SMART Grant data) and Direct Loan modules in EExpress for Windows 2007-2008, Release 2.0 in the following areas:

- **Updated Valid Date Ranges.** We updated valid date ranges for Pell and Direct Loan processing for the 2007-2008 processing cycle to synchronize EExpress with the COD System edits and federal policy. These date ranges include:

Field	Range
Pell Enrollment Date	01/01/2007 to 06/30/2008
Pell Payment Period Start Date	01/01/2007 to 06/30/2008
Pell Disbursement Date	07/01/2007 to 09/30/2013
Date of Birth	01/01/1908 to 12/31/1999
DL Award Begin Date	07/02/2006 to 06/30/2008
DL Award End Date	07/01/2007 to 06/29/2009
DL Academic Year Start Date	07/02/2006 to 06/30/2008
DL Academic Year End Date	07/01/2007 to 06/29/2009
DL Disbursement Date (Subsidized, Unsubsidized, and PLUS loan types)	06/22/2006 to 10/27/2009
DL Disbursement Date (Grad PLUS loan type)	07/01/2006 to 10/27/2009

Note: With the exception of disbursement date range, all Pell date ranges also apply to ACG and National SMART Grant records. The valid 2007-2008 disbursement date range for ACG and National SMART Grant records is 7/1/2007 to 9/30/2012.

- **HERA Overview Help Topics Updated for 2007-2008.** We updated help topics available in Pell, Direct Loan, and EExpress COD online help for 2007-2008 that provide detailed information and guidance on EExpress changes related to the HERA. The topics, which were originally added in EExpress 2006-2007, are titled “Academic Competitiveness Grant (ACG),” “National Science and Mathematics Access to Retain Talent (SMART) Grant,” “Graduate and Professional Student PLUS Loan (Grad PLUS),” and “Other HERA Changes Overview.” The topics can be accessed by clicking **Help, Help Topics** from the EExpress menu bar, selecting the **Index** tab, and typing the name of the topic you want to view.

Pell Enhancements

The following enhancements related to the ACG and the National SMART Grant affect the EExpress Pell module only:

Import

- **ACG and National SMART Grant Electronic Statement of Account (ESOA) Data Now Stored in EExpress Database.** ACG and National SMART Grant ESOA data you import are now stored in the EExpress database for subsequent viewing and printing. Select **File, Import, Pell, Electronic Statement of Account** to import an ACG (message class **AGAS08OP**) or National SMART Grant (message class **SGAS08OP**) ESOA.

To view or print ACG or National SMART Grant ESOA reports you have imported, go to **File, Print, Pell**, select **ESOA** as the Report, then select **ACG** or **National SMART** as the Grant Type (depending on the program you want to print ESOA data for). As with the Pell ESOA report, you can print ACG or National SMART Grant data from a single ESOA file (by Document ID) or all ESOA data for a particular Reporting Entity ID.

Print

- **ACG and National SMART Grant-Specific Reports Added.** We have added several new reports for ACG and National SMART Grant data to the Pell module. The format and content of the following new reports are modeled on the existing Pell versions:
 - Edits by Student – Origination
 - Edits by Student – Disbursement
 - List-Processed Disbursements YTD
 - List-Disbursement Activity Summary
 - SSN/Name Differences

To view or print these reports, go to **File, Print, Pell**, select the report you want to run, and provide the appropriate Grant Type for the data you want to view or print (**Pell, ACG, or National SMART**).

- **Student Summary Report Displays ACG and National SMART Grant Award Data.** We updated the Student Summary report to include 2007-2008 ACG and National SMART Grant award information for the student as part of the existing Pell Grants section of the report. As with Pell records, only ACG and National SMART Grant records with actual disbursements (Disbursement Release Indicator = True, or selected) are displayed or printed on the Student Summary report.

Direct Loan Enhancements

The following enhancements affect the EExpress Direct Loan module only:

Setup

- **Origination Fee Defaults to 2.5% for Subsidized and Unsubsidized Loans.** Provisions of the HERA reduced the origination fee charged to Direct Stafford Loan borrowers to 2.5 percent for 2007-2008 loans, provided the first actual disbursement (Disbursement Release Indicator = True, or selected) is made on or after July 1, 2007. As a result, the Sub/Unsub Loan Fee Percentage in Direct Loan School setup (**Tools, Setup, COD, School, Direct Loan**) will default to the reduced origination fee percentage of 2.5 percent for 2007-2008 subsidized and unsubsidized loan records.

Note: If you are originating loans in EExpress 2007-2008 with a first disbursement date *before* July 1, 2007, you must change the Sub/Unsub Loan Fee Percentage field to 3.0 in Direct Loan School setup before originating those loans. If you want to subsequently originate 2007-2008 loans with a first disbursement date *on or after* July 1, 2007 you must change the Sub/Unsub Loan Fee Percentage field back to 2.5 in Direct Loan School setup before originating those loans.

Entry

- **Flag Added to Indicate Additional Unsubsidized Loan Award for Preparatory Coursework for Enrollment in a Graduate or Professional Program or Teaching Certification.** The HERA increases the 2007-2008 Direct Stafford Unsubsidized loan limit to \$7,000 for students with a College Grade Level of 5 (5th Year other undergraduate) taking preparatory coursework for enrollment in a graduate or professional program or state teaching certification. As a result, we added a new field to the Direct Loan Origination tab labeled “Additional Unsub Preprofessional or Teacher Certification?” (the word “Preprofessional” in the field label refers to preparatory coursework for enrollment in a graduate or professional program). Select this new checkbox to indicate unsubsidized loan records eligible for the higher loan limit under the HERA provision.

The field “Additional Unsub Preprofessional or Teacher Certification?” is available for selection under Direct Loan Query and Direct Loan File Formats. It can also be added or modified using Direct Loan External Import Add or External Change, respectively. The new flag will print on the DL Origination Record and List–Loan Eligibility reports, and can be viewed in Direct Loan Browse on the Sub/Unsub tab.

Note: EDEExpress data edits have been updated to prevent selection of both the “Additional Unsub Preprofessional or Teacher Certification?” and the “Additional Unsub Eligibility for Health Profession Programs?” flags on an unsubsidized loan origination record, whether through manual entry, multiple entry, or external import.

- **MPN Expiration Date Field Added to Origination Tab.** The MPN Expiration Date is now returned in the Common Record Response file (**CRAA08OP**) or the MPN Response file (**CRPN08OP**) by the COD System. When the MPN Expiration Date exists in the response file you import, EDEExpress displays the date on the Direct Loan Origination record in the MPN Information section of the Loan Info tab.

The MPN Expiration Date field is also now available for selection under Direct Loan Query and Direct Loan File Formats. The date will print on the DL Origination Record, List–Sub/Unsub MPN, List-PLUS MPN, and List-Grad PLUS MPN reports, and can be viewed in Direct Loan Browse on the Sub/Unsub, PLUS, and Grad PLUS tabs.

Process

- **Sub/Unsub Loans Originated At Higher Loan Limits Established by the HERA.** As a result of the HERA, some of the annual loan limits in the Direct Stafford Loan Program are increased. The increased loan limits resulting from the HERA are shown in bold below and are effective for a loan originated in EDEExpress on or after July 1, 2007:
 - **\$3,500** for 1st year undergraduate base subsidized/unsubsidized loans; \$4,000 for additional unsubsidized loans
 - **\$4,500** for 2nd year undergraduate base subsidized/unsubsidized loans; \$4,000 for additional unsubsidized loans
 - \$5,500 for 3rd year and beyond undergraduate base subsidized/unsubsidized loans; \$5,000 for additional unsubsidized loans
 - \$8,500 for graduate/professional base subsidized/unsubsidized loans; **\$12,000** for additional unsubsidized loans
 - \$2,625 for preparatory coursework base subsidized/unsubsidized loans (for enrollment in an undergraduate program); \$4,000 for additional unsubsidized loans
 - \$5,500 for preparatory coursework base subsidized/unsubsidized loans (for enrollment in a graduate or professional program); **\$7,000** for additional unsubsidized loans

- \$5,500 for teacher certification base subsidized/unsubsidized loans; **\$7,000** additional unsubsidized loans

Note: The aggregate loan limits for subsidized and unsubsidized loans have not been increased. Also, the preparatory undergraduate coursework loan limits remain at \$2,625 for base subsidized/unsubsidized loans and \$4,000 in additional unsubsidized loans.

Note: The higher loan limits apply to loans first disbursed on or after July 1, 2007. The COD System will use the date of the earliest anticipated disbursement (DRI = False) if there are no actual disbursements (DRI = True) when determining the appropriate loan limits to apply. The COD System will use the earliest actual disbursement, if both actuals and anticipated disbursements exist for a loan, when determining the appropriate loan limits to apply.

For additional details on loan limit increases related to the HERA, see [Dear Colleague Letter GEN-06-02](#), posted to ifap.ed.gov on March 10, 2006.

Import

- **Direct Loan Packaging Import Allows Higher Loan Limits.** You can now import subsidized and unsubsidized loan awards packaged at the higher loan limits established by the HERA for 2007-2008 from the Packaging module into the Direct Loan module to create origination records. Select **File, Import, Direct Loan, Loan Data-Packaging** to perform this import.

Note: You must use the appropriate Packaging Aid Type (Aid Type **S** for subsidized loans or Aid Type **U** or **D** for non-need based or need-based unsubsidized loans, respectively) to package or repackage subsidized or unsubsidized loans at the higher loan limits and import those awards into Direct Loan to create origination records.

Note: The higher loan limits apply to loans first disbursed on or after July 1, 2007. The COD System will use the date of the earliest anticipated disbursement (DRI = False) if there are no actual disbursements (DRI = True) when determining the appropriate loan limits to apply. The COD System will use the earliest actual disbursement, if both actuals and anticipated disbursements exist for a loan, when determining the appropriate loan limits to apply.

COD Print Enhancement

The following enhancements affect COD reports (**File, Print, COD**) only:

- **ACG and National SMART Grant-Specific Reports Added.** The following EDEExpress COD reports are updated to uniquely distinguish ACG and National SMART Grant data (in addition to the Pell and Direct Loan data currently displayed on the report):
 - List – Student Records in Document
 - List – Document Activity

New EDEExpress Release 2.0 Users

All schools submitting Pell, ACG, National SMART Grant, or Direct Loan data must be enrolled as participants with the COD System. You only need to enroll as a participant for Direct Loan or Pell if you were not enrolled with the COD System for the respective program in 2006-2007.

- If your school used EDEExpress in 2006-2007 for both the Pell and Direct Loan programs and registered as a participant with the COD System at that time, you do *not* need to contact the COD System School Relations and register again for 2007-2008.
- If you are a new EDEExpress user, see the “Enrollment Requirements and Training for New EDEExpress Users” topic in the EDEExpress – Release 1.0 section earlier in this guide for additional information and guidance.

All 2007-2008 Pell, ACG, National SMART Grant, and Direct Loan data must be sent to the COD System in the COD Common Record’s Extensible Markup Language (XML) format. Response files received from the COD System are also in XML format and can be imported into EDEExpress to view processed results.

Schools that used non-XML third-party software or mainframe systems to communicate with the COD System in past cycles can use EDEExpress for Windows 2007-2008, Release 2.0 as an XML “translator.”

In this scenario you would:

1. Use record layouts provided in the *2007-2008 COD Technical Reference, Volume III* to create an External Import Add file of origination and disbursement data for Pell, ACG, National SMART Grant, or Direct Loan from your third-party or mainframe system.
2. Import the External Import Add file into EDEExpress to create student records.
3. Export the student data records (in XML format) from EDEExpress.

4. Transmit the data from your SAIG mailbox to the COD System mailbox using the SAIG.

After the data is processed by the COD System and returned to your SAIG mailbox, you can:

1. Download the COD Response file from SAIG.
2. Import the COD Response file into EDEExpress to update the student records.
3. Create a Pell or Direct Loan File Format in EDEExpress to select origination and disbursement fields you want to export from EDEExpress and load back into your third-party or mainframe system.

Note: To create a file format for ACG and National SMART Grant data, select the Pell File Formats option.

4. Perform an External Export from EDEExpress to create data files in flat file (non-XML) format.
5. Load the flat file from the EDEExpress External Export into your third-party software or mainframe system.

Direct Loan (DL) Tools

Direct Loan (DL) Tools is a multi-year Windows-based application designed to provide the following functionality related to all Direct Loan schools' software:

- Compare the School Account Statement (SAS) report loan/disbursement data to loans and actual disbursements recorded in EDEXpress or an external file, and/or compare the SAS to the DL Tools Cash Database.
- Print the SAS in a readable format.
- Track cash receipts (drawdowns) and Refunds of Cash for Direct Loan.
- Rebuild your Direct Loan origination and disbursement records in EDEXpress using an automated process.
- Track your EDEXpress Direct Loan disbursement processing efficiency to monitor against regulatory reporting requirements with the Disbursement Measurement Tool report.

DL Tools Release 7.0, scheduled for release in July 2007, will contain Rebuild, Cash Management, and Compare functionalities for the 2005-2006, 2006-2007, and 2007-2008 cycles.

All Direct Loan schools can use the Compare and Cash Management functions. The Rebuild function allows EDEXpress schools to rebuild selected Direct Loan records or their entire Direct Loan databases. Non-EDEXpress users can also use a Rebuild file to create an EDEXpress database and then export that data from EDEXpress into their own systems to rebuild databases that may have been lost or corrupted.

Enhancement Release for DL Tools Release 6.0

In September 2006, Federal Student Aid posted an enhancement release for DL Tools Release 6.0 to the FSAdownload Web site, located at fsadownload.ed.gov. The September 2006 enhancement release implemented the following functionality:

- DL Tools Rebuild functionality was updated to allow Grad PLUS loans to be rebuilt in your EDEXpress 2006-2007 database. The rebuilt records are identified specifically as Grad PLUS loans in EDEXpress 2006-2007, Release 3.0 and forward.
- The DL Tools Measurement Tool report now displays and prints calculated totals for Grad PLUS loans separately from other loan types.
- Existing DL Tools Release 6.0 reports (excluding the Measurement Tool report) now display Grad PLUS data under existing PLUS report fields, calculations, and statistics.

The September 2006 enhancement release for DL Tools Release 6.0 included two program files, ImportExport6.dll and Report6.dll, that must be copied to the program directories of all PCs accessing your DL Tools Release 6.0 database.

To take advantage of the functionality added in the September 2006 enhancement release for DL Tools Release 6.0, you must also install EDEExpress 2006-2007, Release 3.0 (available at <http://fsadownload.ed.gov/>), Release 4.0 (available December 2006), or Release 5.0 (available April 2007).

Schools that do not use the DL Tools software, or that do not plan to use EDEExpress 2006-2007 for Grad PLUS loan processing, do not need to install the September 2006 DL Tools enhancement release.

For more information, see the [electronic announcement](#) regarding the September enhancement release posted on ifap.ed.gov on September 1, 2006.

Enhancements for DL Tools Release 7.0

Listed below are the additional planned enhancements to DL Tools for Windows, Release 7.0:

General

- **2004-2005 Functionality Removed.** We are removing all DL Tools functionality applicable to program year 2004-2005. This includes the elimination of all COD Phase-In Participant Rebuild fields.
- **Program Year 2007-2008 Added.** We are adding DL Tools functionality applicable to program year 2007-2008.

Note: Additional enhancements may be identified for DL Tools Release 7.0 and will be communicated by Federal Student Aid in future communications.

SSCR

SSCR (Student Status Confirmation Report) for Windows is a multi-year application designed to help you perform enrollment reporting electronically with the National Student Loan Data System (NSLDS). No changes are planned for the SSCR software for the 2007-2008 cycle.

NSLDS regularly sends you an Enrollment Reporting Roster, formerly called the SSCR Roster, containing the students enrolled at your school for whom NSLDS has loan records. SSCR Release 3.0, currently available on the FSAdownload Web site (fsadownload.ed.gov), can be used to import, update, and export student records in the Enrollment Reporting Roster to return to NSLDS.

The Enrollment Reporting Roster can be sent to you by NSLDS as often as once a week or as seldom as twice a year. You can change your preferences on the U.S. Department of Education's NSLDS Web site, located at nsls.ed.gov/nsls_FAP/secure/logon.jsp.

Software and Hardware Requirements

Federal Register Notice – September 2004

The Student Assistance General Provisions regulations in 34 CFR 668.16(o) provide, in part, that to be administratively capable an institution must participate in electronic processes designated by the Secretary. These processes were first identified in a notice published in the *Federal Register* on September 19, 1997. In that Notice, we also provided information regarding the hardware and software requirements needed for an institution to participate in the designated electronic processes.

Because of advances in technology, we updated those hardware and software requirements in the *Federal Register* Notice published on December 22, 2000, and, most recently, in the *Federal Register* Notice published in September 2004.

The current designated electronic processes and new minimal and optimal hardware and software requirements can be found in the September 2004 Notice, available on the IFAP Web site at:

ifap.ed.gov/fregisters/FR09142004

Getting Help

CPS/SAIG Technical Support

If you have any questions regarding this guide or the 2007-2008 EDESuite software products in general, contact CPS/SAIG Technical Support at 800/330-5947 or by sending an e-mail to CPSSAIG@ed.gov. TDD/TTY services are also available at 800/511-5806. Representatives are available Monday through Friday, 7 a.m. to 7 p.m. (CT).

CPS/SAIG Technical Support can assist you with the following:

Software and Web Assistance

- EDExpress – Application Processing, Packaging, Direct Loan, and Pell (including ACG and National SMART Grant)
- DL Tools
- SSCR
- FAA Access to CPS Online
- Return of Title IV Funds (R2T4)
- ISIR Analysis Tool
- CPS Test System Support
- Custom/Combo/Mainframe Support for Direct Loans
- EDconnect
- Student Aid Internet Gateway (SAIG) Network Password Changes and Resets, Restoral of Files to Mailboxes, and Transmission Error Resolution
- EDE Enrollment and Participation
- Federal Student Aid Fall Conferences

Technical References

- *COD Technical Reference Vol. III*
(Pell Grant, ACG, National
SMART Grant & Direct Loan
Combination System Supplement)
- *Electronic Data Exchange (EDE)
Technical Reference*
- *EDExpress Packaging Technical Reference*
- *COD Technical Reference Vol. IV*
(Direct Loan Tools)

The IFAP Web Site

Visit our Information for Financial Aid Professionals (IFAP) Web site at ifap.ed.gov. IFAP contains the latest information on federal financial aid, including Dear Partner/Colleague Letters, electronic announcements, training information, ED publications, technical publications, and other documents.

In addition, on the IFAP home page under Online References, there is a link to “Higher Education Reconciliation Act of 2005 (HERA) Information Including ACG and National SMART Grant information.” Click on the link for a complete list of Federal Student Aid’s published information about the HERA.

Other Customer Service Resources

Sources of Assistance for Schools

For a complete listing of all Federal Student Aid sources of assistance, go to the Financial Aid Professionals Web site at fsa4schools.ed.gov/help/contacts.

COD School Relations Center

The COD School Relations Center integrates customer service for the Direct Loan, Pell Grant, ACG, and National SMART Grant programs for all award years.

If you have any questions, contact the COD School Relations Center at 800/4PGRANT (800/474-7268) for ACG, National SMART Grant, and Pell Grant or 800/848-0978 for Direct Loan. The COD School Relations Center telephone system prompts the school to enter the award year about which the school is calling, and the call is routed to the proper COD Customer Service Center staff.

E-mail: CODsupport@acs-inc.com

Federal Student Aid Information Center (FSAIC)

800/4-FED-AID (800/433-3243); TDD/TTY: 800/730-8913

The Federal Student Aid Information Center (FSAIC) assists students with address and school code changes, questions regarding completion of the FAFSA and SAR corrections, FAFSA status inquiries, requests for duplicate SARs, publication requests, and other general student financial aid questions. FSAIC can also provide student borrowers with the name and phone number of the holders of their loans.

Representatives are available Monday through Sunday, 8 a.m. to midnight (ET).

Research and Customer Care Center (RCCC)

800/433-7327 (phone); 202/275-5532 (fax)

Federal Student Aid's Research and Customer Care Center (RCCC) provides assistance with Title IV policy and regulations, including questions regarding application processing systems and the HERA, and helps clients contact other ED staff.

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

E-mail: FSA.Customer.Support@ed.gov

FSATECH Listserv

This listserv is used to address technical questions and issues about Federal Student Aid's systems and software.

For more information about FSATECH, including how to subscribe, go to fsa4schools.ed.gov, click "Listservs/Mailing Lists" on the left menu, and click the "FSATech" link.

Documents

The following documents detail 2007-2008 changes to the Central Processing System (CPS), the COD System, Federal Student Aid Web sites for financial aid professionals, and the EDEExpress for Windows software. All documents listed are located on the Federal Student Aid download Web site, located at fsadownload.ed.gov, and on the Information for Financial Aid Professionals (IFAP) Web site, located at ifap.ed.gov.

- *Renewal FAFSA Process Guide*, available September 2006
- *Summary of Changes for the Application Processing System*, available October 2006
- *2007-2008 EDEExpress Packaging Technical Reference*, available October 2006 (FSAdownload Web site only)
- *2007-2008 Electronic Data Exchange (EDE) Technical Reference*, available November 2006
- *2007-2008 Common Origination and Disbursement (COD) Technical Reference*, available November 2006
- *The ISIR Guide*, available November 2006
- *Student Web Application Products Process Guide*, available November 2006
- *EDEExpress for Windows 2007-2008, Release 1.0 Desk Reference*, available January 2007 (FSAdownload Web site only)
- *EDEExpress for Windows 2007-2008, Release 2.0 Desk Reference*, available April 2007 (FSAdownload Web site only)

For record layouts and other information on the Enrollment Reporting process, see the *NSLDS Enrollment Reporting Guide*. To find this document on the IFAP Web site, click the “NSLDS Reference Materials” link on the main page under “On-Line References,” then click “NSLDS User Documentation” on the following page.

Web Sites

You can find out more about the products and services described in this guide, as well as information about other student financial aid tools, on the following Web sites:

- Federal Student Aid's Schools Portal (including FSATECH subscription): fsa4schools.ed.gov
- IFAP: ifap.ed.gov
- FSAdownload: fsadownload.ed.gov
- Training for Financial Aid Professionals (TFAP): ed.gov/offices/OSFAP/training
- SAIG Enrollment: fsaweбенroll.ed.gov
- FAA Access to CPS Online: fafsa.ed.gov/FOTWWebApp/faa/faa.jsp
- Federal Student Aid PIN: pin.ed.gov
- Common Origination and Disbursement (COD): cod.ed.gov
- Demonstration Web site: fafsademo.test.ed.gov
- Quality Assurance Web site: ifap.ed.gov/qahome/Default.html