Electronic Access Conference

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What's New in EDExpress 9.1 Pell for 2003–2004

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Introduction

- ■ Who is this session for?
  - – Intermediate to Advanced EDExpress Pell module users
- ■ Goal is to provide you with updated Pell information so you can plan for the upcoming cycle

Agenda

- Highlight 2003–2004 changes to the EDExpress Pell module

- Share EDExpress Pell processing tips

- Evaluations

- Questions?

COD Participation

- Starting in 2003–2004 EDExpress will be a full participant in COD

- EDExpress can no longer be used for exception processing (i.e., importing acknowledgements only to determine record status)

- Data must be exported before it can be imported

COD Participation

- If you use EDExpress in 2003-2004, you will communicate with COD as a full participant, but you need to register with COD to indicate your school will be a full participant

- You can sign up to be a full participant with COD Customer Service in the PC Lab

New Terminology

OLD TERM	NEW TERM
Batch ID	Document ID
Origination	Edit Only
Acknowledgement	Response

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Global Changes

- Batch ID has been replaced by Document ID on the screens and the reports
- New File | Open options allow the user to use either current or original SSN
- Link to FAA Access to CPS Online has been added to the view menu. FAA Access to CPS Online can be used to check the student key data in CPS.

Global Changes

- Users can now print to a file within a student's record

- New Student Summary report–A summary of ISIR, Packaging, Direct Loan and Pell information on the same report

- Users can now e-mail any of the User-Defined Letters to the student directly from EDExpress

Setup

- **School Setup**
  - Added Reporting and Attended Entity IDs
  - There are now six Funding Methods which replace the Institutional Disbursement option:
    - Advance Pay
    - Pushed Cash
    - Just in Time (JIT)
    - Cash Monitoring 1
    - Cash Monitoring 2
    - Reimbursement
  - JIT is a pilot program in Pell, but not in Direct Loans

Setup

- Two new Setup options
  - Pell System Setup: Enables user to set up the Source Entity ID and indicate a Third-Party Servicer
  - Disbursement Setup: Enables user to set up a profile code and associate up to 20 disbursement dates with the code. Pell will now only allow 20 disbursements but adjustments can be made to the disbursements.

Setup – Disb Profile

- An example of the screen:

Pell Tab

- Verification Status: Added "S" for Selected, Not Verified

- Removed Disbursement dates from origination and added the Disbursement Profile Code

- The Calculate Award Amount will now create disbursements if the record passes all of the edits and the record has a Disbursement Profile Code

- View Processed Edits will now only display the edit codes and not the message text

Disbursement Tab

- **Disbursement Sequence Number has been added to the disbursement. Sequence number is set by EDExpress**

- **Example**

Disb #	Seq #	Amount	YTD Total
1	01	500	500
1	02	300	300
2	01	500	800

Disbursement Tab

- Disbursement Release Indicator has been added
  - If this field is left blank (False), the disbursement is treated as an edit-only disbursement
  - If the field is checked (True), the disbursement is treated as an actual disbursement

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Disbursement Screen

Disbursement Tab

- **Disbursement Release Indicator for actual disbursements cannot be checked more than indicated number of days in the future**
  - 30 (Advance Pay),
  - 7 (JIT, CM 1)
  - 0 (CM2, Reimbursement) days in the future
- **View Processed Edits will now only display the edit codes and not the message text**

Multiple Entry

- **The following fields have been added to multiple entry:**
  - – Disbursement Profile Code
  - – Disbursement Number
  - – Set Disbursement Release Indicator to True
- **Selected fields can now be corrected to blank through multiple entry**

Exports

- Origination and Disbursement data exports have been removed

- New Common Record export. Common Record combines all edit only and disbursement data. Set "R" Ready to Send. User can export only Pell, Direct Loan or both. This file is in the new XML format and sent to COD.

Exports

- Document ID has the following format:
  - CCYY-MM-DDTHH:mm:ss.ff99999999
  - CCYY-MM-DD (Century, Year, Month, Date)
  - T (Constant "T")
  - HH:mm:ss.ff (Hours, minutes, seconds, thousandths)
  - 99999999 (Source Entity ID from Setup)

Exports

- Edit Only is basically the origination information with anticipated disbursements (DRI = "FALSE")

- Disbursement data can be sent with the origination information, but the disbursements are treated as actual when the DRI = "TRUE"

- The user can export specific Edit Only data or Disbursement data by using selection criteria and setting the disbursement release indicator to True or False

Exports

- Data Request and External export are still in the flat file format

Imports - COD

- Removed Origination Acknowledgement and Disbursement Acknowledgement

- Acknowledgements have been replaced with COD Common Record Responses

- Responses will now be in the Common Record, which is in the new XML format

Imports - COD

- ## Response Records include:
  - "RS": response to file sent to COD
  - "ND": system generated negative disbursement

- ## Added Pell Pending Disbursement Report and Pell Funded Disbursement Report. These are both preformatted reports.
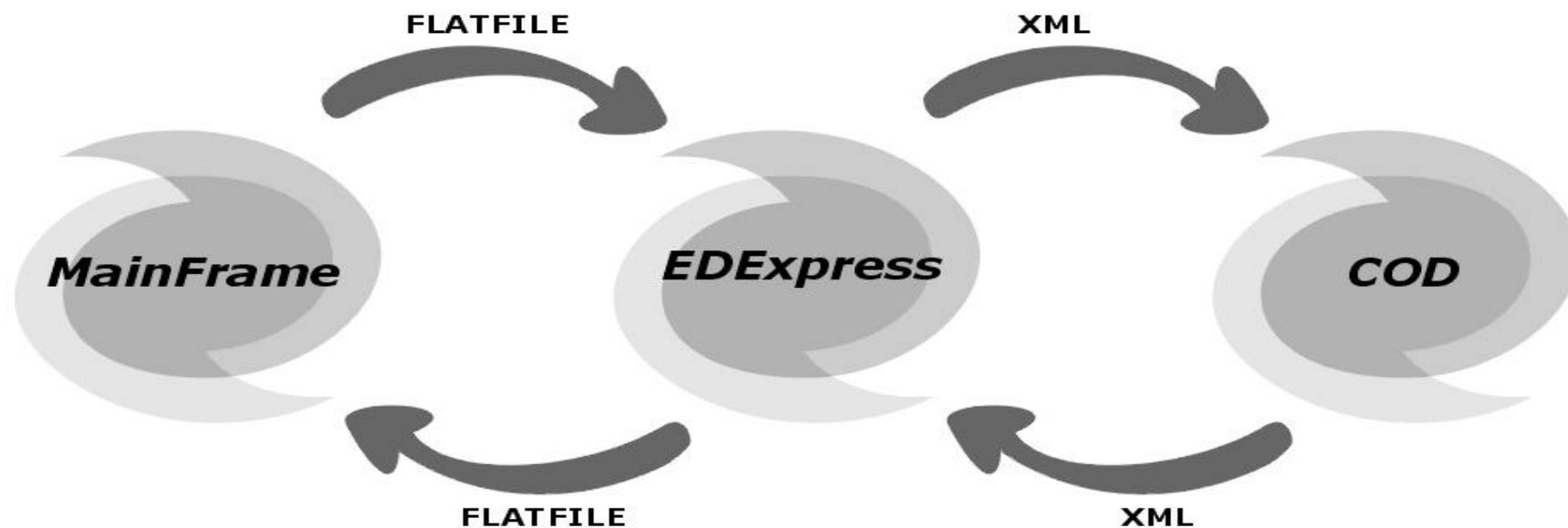
Imports - COD

- The Data Request Acknowledgement, MRR, Reconciliation, ESOA, and YTD files will all remain in the flat file format

Imports

- External Origination and Disbursement Add files will remain in the flat file format. Changes made to the record layouts to accommodate adding and deleting of fields.

Combo School

Regenerate

- Pell Origination and Disbursement regenerate has been removed

- Users will be able to regenerate a Common Record document

- Pell regenerate now functions like Apps. It regenerates various documents instead of resetting the status to allow for export.

Reports

- ESOA report has been modified to:
  - include the Common School Identifier
  - remove Accounting Schedule and Date and replace it with Transaction Date
  - combine Sections A and B into one section

EDExpress Pell Processing Tips

Tip #1

- ## File | Export | Pell | Combine Direct Loan and Pell option

  - User can combine the Direct Loan and Pell data into one file for transmission to COD

  - Benefit of only having to export one file and transmit one file

Tip #2

- Tools | Setup | Global | Security Users | Export to EDconnect option
  - By selecting this option every time a user exports a file, this information will automatically be set up in EDconnect

Tip #3

- **Tools | File Format | Pell**
  - Create two formats to get the basic origination and disbursement data out of EDExpress
  - Origination Format could include the following fields:

    NAME, Origination ID, Amount (award), Status
  - Same could be done for Disbursement data
  - Or create one format that contains all the data

Tip #4

- This is a reminder Tip. Please remember if you are using EDExpress to sign up as a Full Participant with COD. This can be done in the PC Lab.

Contact Information

We appreciate your feedback and comments.

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