

Session 22



EDExpress/COD Processing from a Pell Perspective

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2005-2006 EDEExpress Release 2 Pell Processing

This session provides information regarding the updates and enhancements in the 2005-2006 EDEExpress Release 2 software for processing Pell.

Agenda

Global module updates

- General
- Grid functions
- Demographic screen

Pell module updates

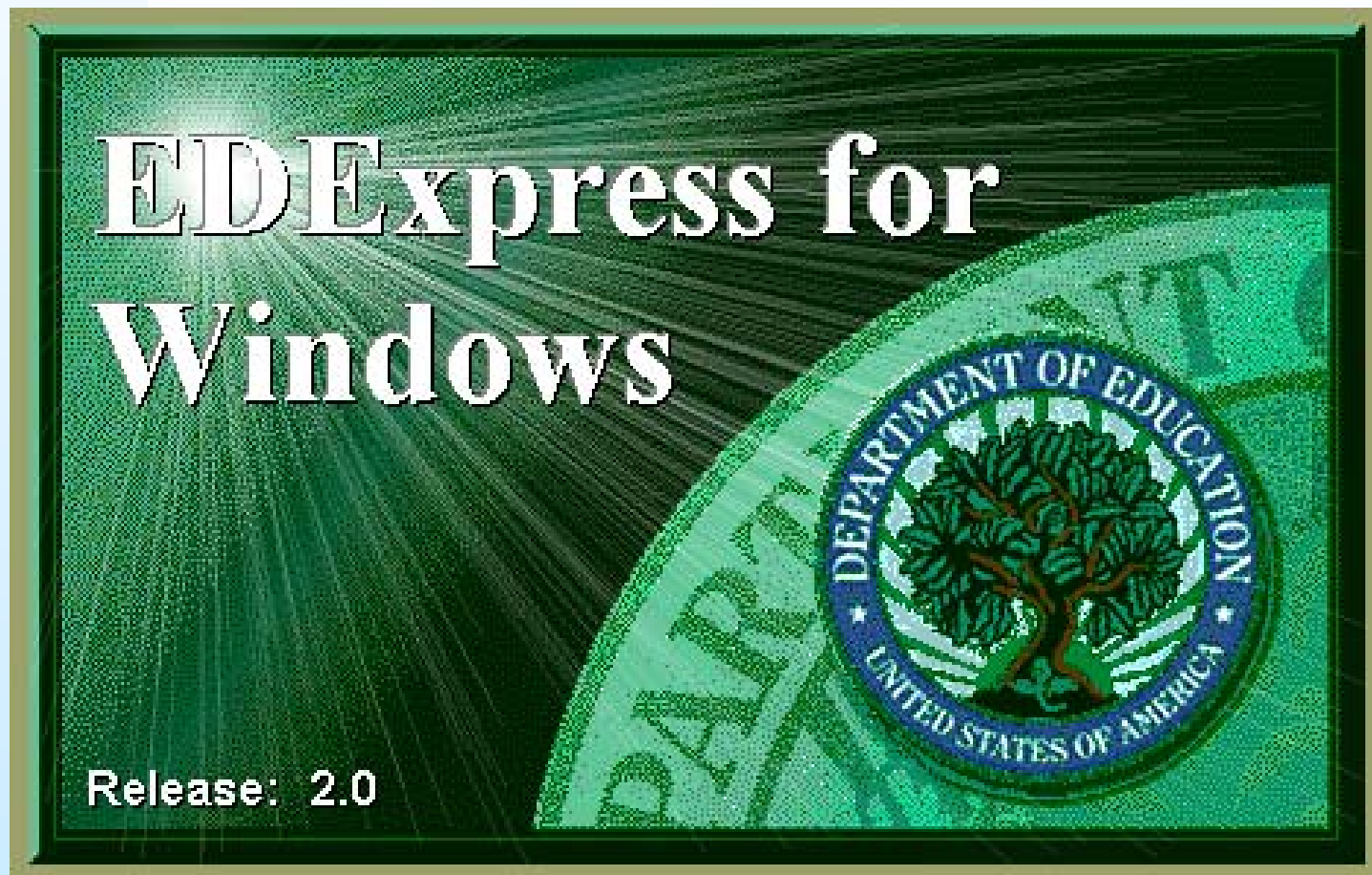
- General
- Setup
- Disbursement
- Import
- Print



Global Enhancements

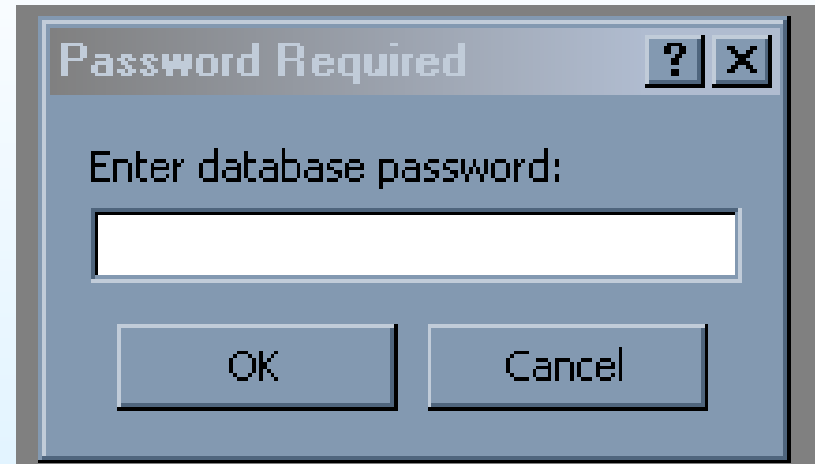
EDExpress/Pell
2005-2006

Global Enhancements- General



Global Enhancements- General

- ❑ The EDEExpress Access database has been password protected
 - Password is needed to open, view, or modify the database in Microsoft Access 2002
 - Software documentation will refer user to the Help Text to obtain the password




Global Enhancements- General

- ❑ FAA Access authentication data Setup fields have been encrypted in the EDEExpress Access database

Microsoft Access - [tbl_A_ParamGeneral : Table]

File Edit View Insert Format Records Tools Window Help



	PRINTLOCATIO	USERID	FAASSN	FAANAMEID	FAADOB	SCHOOLCODE	SAVERE
▶	Screen	A	*****	:F	0)/ /2*	001019	^bm^oZl
	Screen	SYSADMIN					
*	PRINTER						



Global Enhancements- General

- An “Automatically Transmit?” checkbox has been added to Global-Security Users setup
- If this feature is selected in Setup, the system will initiate a transmission in EDconnect after a file is exported in EDExpress

Global Enhancements- General


Security Users [X]

User ID:

Group Name:

Logged in? Export to EDconnect? Automatically Transmit?

Password:

Password Date: 

NEW RECORD

Add Delete Save Retrieve...

OK Cancel Help

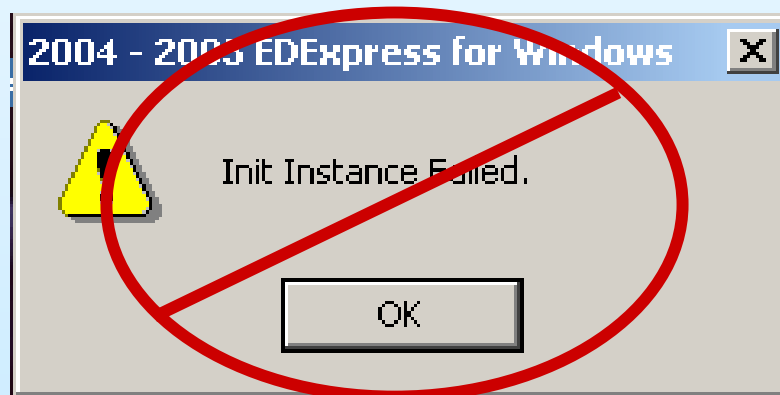
Global Enhancements- General

- ❑ Users can access R2T4 and ISIR Analysis Tool Web home pages from the View menu in EDEExpress



Global Enhancements- General

- ❑ EDEExpress will maximize automatically instead of generating an “Init Instance Failed” message if the user attempts to open EDEExpress when it has been minimized



Global Enhancements- Grid Functions

- Demographic grid columns have been modified to display the full last name without scrolling
- Multiple Entry “update” grid provides an option to deselect records
- Select records grid display in “key order” (SSN, Award ID or Loan ID)

Global Enhancements- Grid Functions

Demographic Database

	Original SSN - Demo	Current SSN - Demo	Student's Last Name - Demo	Student's First Name - Demo
▶	001-48-8578	001-48-8578	ALARCON	ALEMAYEHU
	002-20-1810	002-20-1810	ROBLES	JON
	002-38-1474	002-38-1474	MONTGOMERY	IVAN
	002-68-4685	002-68-4685	PEARSON	IRIS
	003-78-9961	003-78-9961	MAMYAN	VLADIMIR
	004-72-7499	004-72-7499	JONES	MARCUS
	006-84-6590	006-84-6590	PI	PATRICIA
	006-96-3950	006-96-3950	HUFF	CONSUELO
	006-96-3951	006-96-3951	PENA	CONSUELO
	110-00-1810	002-20-1810	JONES	JOHN
	110-02-7499	004-72-7499	PAULSON	MARCUS
	110-04-6590	006-84-6590	PIE	PATRICIA
	110-06-3950	006-96-3950	HUFFINGTON	CONNIE
	110-06-3951	006-96-3951	BOWME	DAVID
	110-08-1474	002-38-1474	JEFFERSONS	IVAN
	110-08-4685	002-68-4685	JOHNSON	IRIS
	110-08-8578	001-48-8578	SMITH	AL
	110-08-9961	003-78-9961	MAXWELL	VLADIMIR
	221-10-1810	002-20-1810	ROBINSON	JON

Record 1

OK Cancel

Global Enhancements- Grid Functions

Pell Multiple Entry

	Selected	Last Name	First Name	Middle Initial	Award ID	Cost of Attendance
1	<input checked="" type="checkbox"/>	ALARCON	ALEMAYEHU		001488578AL200600187500	\$15231

Save Cancel Help

Global Enhancements- Demographic Screen

- ❑ A “Loan Exit Counseling Complete Date” field has been added
- ❑ A second email address field has been added creating separate email address fields for a primary and a secondary email address
- ❑ Canadian province/territory codes have been added to the State field selection



Global Enhancements- Demographic Screen

2005 - 2006 EDExpress for Windows - [[222-22-2222]]

File Process View Help

Last First M.I.

Permanent/Local Address:
 Address:
 City, State, Zip:
 Phone: Country Code:
 Address:
 City, State, Zip:
 Phone:

E-mail Address 1:
 E-mail Address 2:

Current SSN:
 Original SSN:
 Date of Birth:
 Driver's License:
 Citizenship Status:
 Alien Registration #:
 Dependency Status:

Verification Status Code:
 Loan Entrance Interview Date:
 Loan Exit Counseling Completed Date:
 Transaction Paid On:

Change Dates:

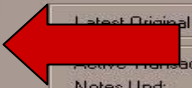
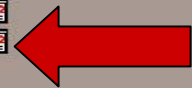
Permanent Address:
 Local Address:
 Social Security #:
 Date of Birth:

Latest Original Student ID:
 Active Transaction:
 Notes Upd:
 Record Upd:
 Packaging Status: Record Source: M
 Document Status: Loan Records? N
 Pell Records? N

School Use:

Demo

For Help, press F1





Electronic Access Conference

Orlando, Florida
Las Vegas, Nevada
2004

Pell Module Enhancements

EDEExpress/Pell
2005-2006

Pell Enhancements- General

- ❑ The two digits that represent the cycle year have been incremented to “06”
- ❑ Users can print the Origination Record to the screen while within a student’s record



Pell Enhancements- Origination Tab

- ❑ The Secondary EFC Code field has been removed from the Pell Module
 - CPS will continue to calculate the Secondary EFC on the ISIR
 - Removed from Origination screen, reports and export/import files
- ❑ Label Change—Origination ID has been changed to Award ID
 - Origination Screen
 - All reports

Pell Enhancements- Origination Tab

2005 - 2006 EDExpress for Windows - [ALEMAYEHU ALARCON]

File Record Process View Help

Direct Loan **Pell Grant**

Student Information Original SSN: Original Name Code: School Information Reporting Pell ID: Attended Pell ID: Reporting Entity ID: Attended Entity ID:	Origination Information ← Award ID: Origination Status: Origination Processed Date: Document ID: Record Source: Total Payment Ceiling: Scheduled Award: Total of All Disbursement Amounts: \$0.00	Last Updated User: Date: Time: Record 0 of 0
---	--	---

CPS Transaction #: <input type="text"/> EFC: <input type="text"/> Cost of Attendance: <input type="text"/> Enrollment Date: <input type="text"/> Award Amount for Entire School Year: <input type="text"/> E-mail Address 1: <input type="text"/> ← E-mail Address 2: <input type="text"/>	Disbursement Profile Code: <input type="text"/> Verification Status Code: <input type="text"/> Low Tuition & Fees Code: <input type="text"/> Incarcerated?: <input type="text"/> School Internal Sequence Number: <input type="text"/> Origination Cross Reference: <input type="text"/>	Enrollment Information - For School Use Only Enrollment Status: <input type="text"/> Academic Calendar: <input type="text"/> Payment Methodology: <input type="text"/> Weeks of Instructional Time Used to Calculate Payment: <input type="text"/> Weeks of Instructional Time in Program's Definition of Academic Year: <input type="text"/> Credit/Clock Hours Used to Calculate Payment: <input type="text"/> Credit/Clock Hours in This Student's Program of Study's Academic Year: <input type="text"/>
--	---	--

Demo FAFSA Student Inquiry ISIR Rvw Docs Notes User Data **Origination** Disburse Awards
 For Help, press F1 C:\PROGRAM FILES\EDSUITE\EDEXPRESS FOR WINDOWS 2005-2006\expres56.mdb NUM

Pell Enhancements- Setup

- New setup fields in 2004-2005 that will import in the Prior Year Import function:
 - Calculate Amount Using Pennies? (School)
 - Disable Source Entity ID Setup Warning (System)
 - Combine DL and Pell Export (System)
 - Module and Inactive fields (Disbursement)

Pell Enhancements- Disbursement

- Users can make disbursement adjustments to the date and the amount in the same transaction—for Pell only
 - Edit 057, restricting date and amount adjustments in the same transaction, has been removed
 - Includes disbursement adjustments made on the COD web site

Pell Enhancements- Disbursement

- ❑ New edits have been added for disbursing records that have a Verification Status of W
 - **1302**—Disbursement amount greater than 50% of the award amount
 - **1303**—Disbursement adjustment amount greater than Disbursement 1/Sequence 1 disbursement amount
 - **1304**—DRI can only be selected for the 1st disbursement

Pell Grant

Add Disbursements

Disbursement Number:

Disbursement			Amount		Pay Period	Disbursement			
#	Seq.	Date	Submitted	Accepted	Start Date	Status	Rel. Ind.	Cross Reference	Document ID
01	1	08/15/2004	\$300.00			R	<input checked="" type="checkbox"/>		
02	1	10/30/2004	\$300.00			R	<input type="checkbox"/>		
03	1	02/15/2005	\$300.00			R	<input type="checkbox"/>		

Additional Information

CPS Transaction #: 01 Total Actual Disbursed Amount: \$ 300.00
 EFC: 3188 Pell Processor YTD Total: \$ 0.00
 Attended Pell ID: 030107 Award Amount: \$ 900

Record

Pell Enhancements- Import

- A warning has been added to the Import Edit Report Web Response for the following condition:
 - If the user created actual disbursements on the COD web site, and
 - Upon importing the Response, the combination of the anticipated and actual disbursements exceeds the award amount

Pell Enhancements- Import

Report Date: 09/16/2005 U. S. DEPARTMENT OF EDUCATION Page: 1

Report Time: 15:13:26 2005-2006 FEDERAL PELL GRANT PROGRAM

Pell Response - Web Generated (WB)

THIS DOCUMENT CONTAINS SENSITIVE INFORMATION PROTECTED BY THE PRIVACY ACT

Document Id: 2005-09-15T13:10:30.2212345678

Last Name

SSN	Reporting Entity Id #	Disbursement Seq	Disbursement Date	Disbursement Amount
123-45-6789	12345678	1	66 09/15/2005	\$1,025.00
07/22/1975	Total of all disbursements exceeds Award Amount in EExpress. Award Amount must be increased or total of all disbursements must be decreased in EExpress before taking further action on this Award.			

Total Disbursement Records in Document 1
Total Disbursement Amount Reported in Document \$1025.00

COD Screen Shot/sign up for web response to SAIG mailbox

Pell Enhancements- Print



A COD Print Tab has been added to the print functionality on the main menu and will contain the following reports:

- List—Disbursement Profile Setup
- List—Document Activity
- List—Student Records in Document
- Student Summary



Pell Enhancements- Print

Print

Global App Express Packaging Direct Loan Pell COD

Report

List - Disbursement Profile Setup
List - Disbursement Profile Setup
List - Document Activity
List - Student Records in Document
Student Summary

Single
Multiple

E-mail

File...

SSN File

File...

Options

Sort Order: Disbursement Profile Code

Module: All

DL Code: ...

Status: Both Active and Inactive

Selection Criteria OK Cancel Help Print Setup

List—Disbursement Profile Setup

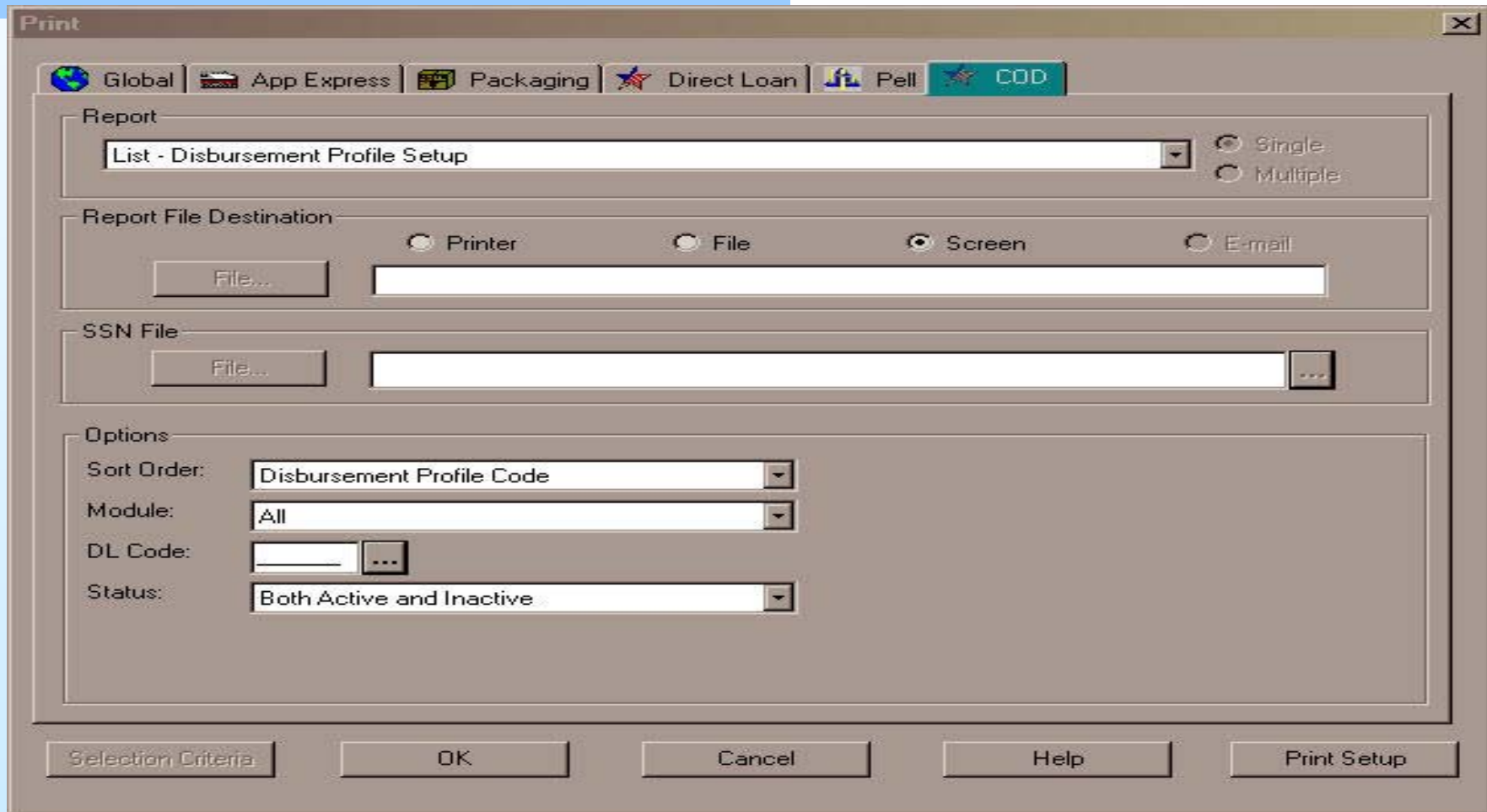
Print options

- All disbursement profiles
- DL disbursement profiles
- Pell disbursement profiles
- “Both” disbursement profiles

Sort order

- Disbursement Profile Code
- Disbursement Profile Description
- Module
- Status
- DL-Loan Period Start Date

List—Disbursement Profile Setup



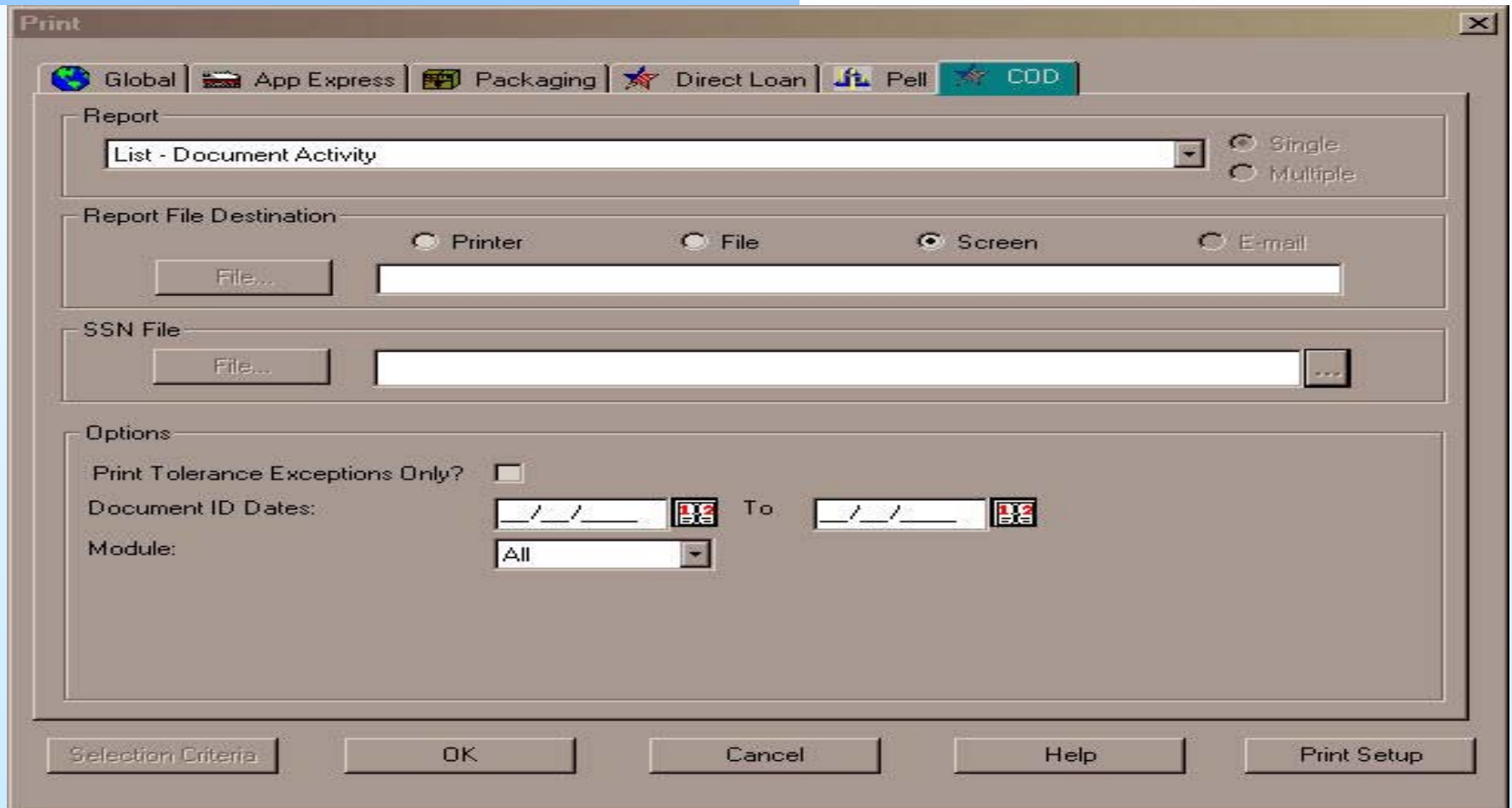
The screenshot shows a 'Print' dialog box with the following sections:

- Global Navigation:** Buttons for Global, App Express, Packaging, Direct Loan, Pell, and COD.
- Report:** A dropdown menu set to 'List - Disbursement Profile Setup'. Radio buttons for 'Single' (selected) and 'Multiple'.
- Report File Destination:** Radio buttons for 'Printer', 'File', 'Screen' (selected), and 'Email'. A 'File...' button and an empty text field.
- SSN File:** A 'File...' button and an empty text field with a browse button (...).
- Options:**
 - Sort Order: Dropdown menu set to 'Disbursement Profile Code'.
 - Module: Dropdown menu set to 'All'.
 - DL Code: Text field with a browse button (...).
 - Status: Dropdown menu set to 'Both Active and Inactive'.
- Buttons:** Selection Criteria, OK, Cancel, Help, and Print Setup.

List—Document Activity Report

- This report will include document activity for both Direct Loan and Pell with the following options:
 - Only Direct Loan records in a document
 - Only Pell records in a document
 - Both Direct Loan and Pell records in a document

List—Document Activity Report



The screenshot shows a 'Print' dialog box with the following sections and controls:

- Global Navigation:** Buttons for Global, App Express, Packaging, Direct Loan, Pell, and COD.
- Report:** A dropdown menu set to 'List - Document Activity'. To the right are radio buttons for 'Single' (selected) and 'Multiple'.
- Report File Destination:** Radio buttons for 'Printer', 'File', 'Screen' (selected), and 'E-mail'. A 'File...' button is next to a text input field.
- SSN File:** A 'File...' button next to a text input field with a browse button (...).
- Options:**
 - 'Print Tolerance Exceptions Only?' checkbox (unchecked).
 - 'Document ID Dates:' with two date pickers (MM/DD/YYYY) and a 'To' label between them.
 - 'Module:' dropdown menu set to 'All'.
- Buttons:** Selection Criteria, OK, Cancel, Help, and Print Setup.

List—Document Activity

Report Date: 99/99/9999 U.S. DEPARTMENT OF EDUCATION PAGE: 1

Report Time: 99:99:99 9999-9999 EDEExpress - COD

Document Activity List

THIS DOCUMENT CONTAINS SENSITIVE INFORMATION PROTECTED BY THE PRIVACY ACT

Document ID Dates: 99/99/9999 to 99/99/9999

Document ID	Create	Response	Days	Document	DL	Pell
Export Filename	Date	Import Date	Elapsed	Type		
Import Filename						
9999-99-99T99:99:99:999999999999	99/99/9999	99/99/9999	999	00	Y	Y
00000000000000000000000000						
00000000000000000000000000						
9999-99-99T99:99:99:999999999999	99/99/9999	99/99/9999	999	00	Y	Y
00000000000000000000000000						
00000000000000000000000000						

List—Student Records in Document

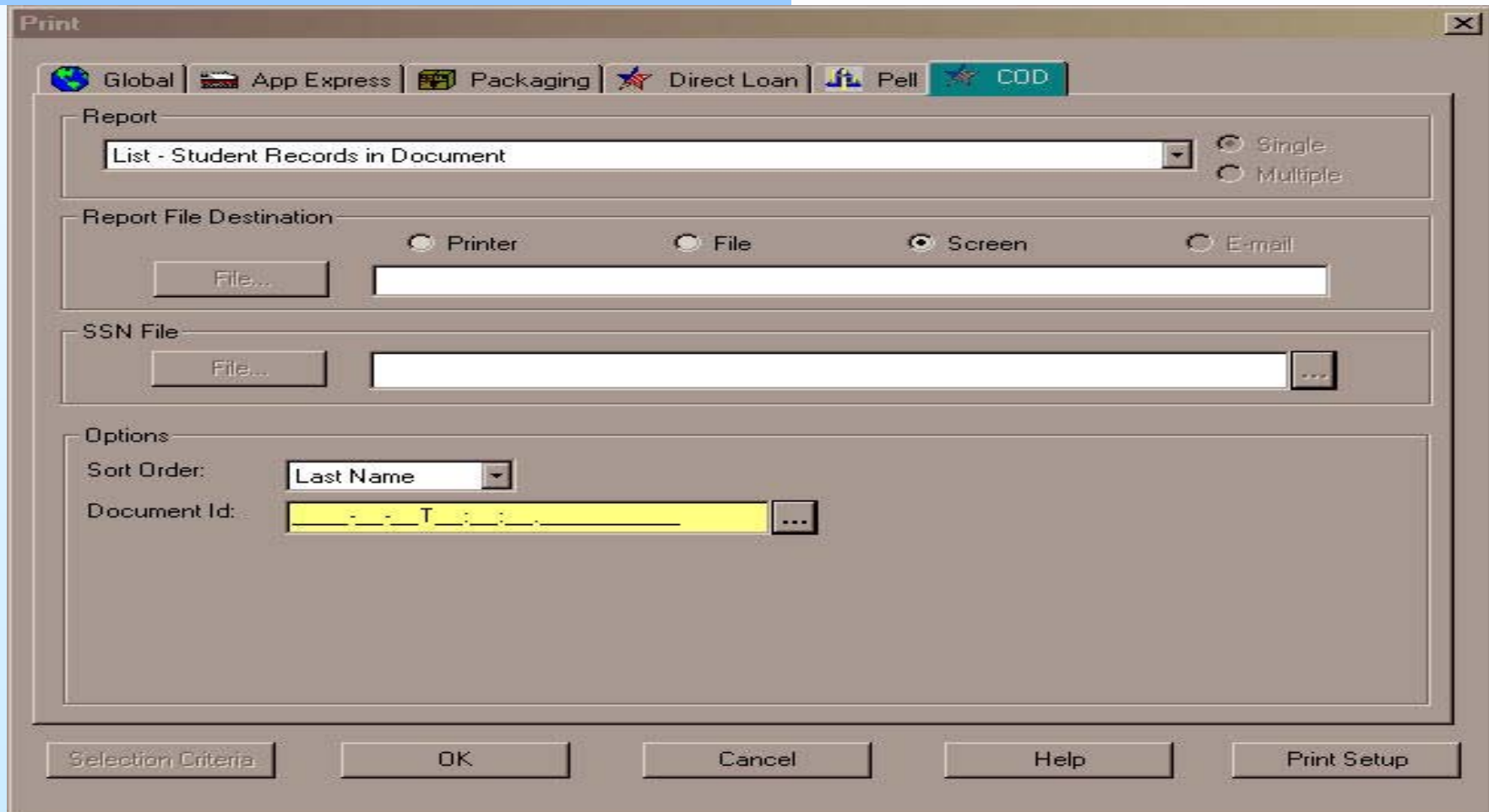
Data elements:

- SSN
- Last Name
- First Name
- Program Type
- Award ID
- Loan ID

Record type in the document for each student record:

- Pell Origination
- DL Origination
- Pell Disbursement
- DL Disbursement
- DL Change

List—Student Records in Document



Print

Global | App Express | Packaging | Direct Loan | Pell | COD

Report: List - Student Records in Document

Single Multiple

Report File Destination: Printer File Screen E-mail

File... [Text Field]

SSN File: File... [Text Field]

Options: Sort Order: Last Name

Document Id: [Text Field]

Selection Criteria | OK | Cancel | Help | Print Setup

List—Student Records in Document

Report Date: 99/99/9999 U.S. DEPARTMENT OF EDUCATION PAGE: 1

Report Time: 99:99:99 9999-9999 EExpress - COD

List - Students in Document
 SORT ORDER: Current SSM

THIS DOCUMENT CONTAINS SENSITIVE INFORMATION PROTECTED BY THE PRIVACY ACT

DOCUMENT ID: 9999-99-99T99:99:99:99.999999999

Student's Name PLUS Borrower's Name Award ID	Student's Current SSN Program	Origination	Disburse	Change
-----	-----	-----	-----	-----
000000000000000000, 000000000000 0	999-99-9999			
000000000000000000, 000000000000 0				
000000000000000000000000	Direct Loan	Y	Y	N
000000000000000000000000	Direct Loan	N	Y	Y
000000000000000000000000	Pell	Y	N	

List-Student Records in Document - Totals

DOCUMENT TOTALS

Total # Unduplicated Students:	9999999
Total # Award ID's in Document:	9999999
Total # Direct Loan Award ID's:	9999999
Total # Subsidized Loans:	9999999
Total # Unsubsidized Loans:	9999999
Total # PLUS Loans:	9999999
Total # Direct Loan Disbursement Records:	9999999
Total # Direct Loan Change Records:	9999999
Total # Pell Award ID's:	9999999
Total # Pell Disbursement Records:	9999999

Available on fsadownload@ed.gov



- ❑ 2005-2006 Release 1 available
January/2005; Release 2 available
March/2005
- ❑ 2005-2006 Electronic School Process Guide
available now
- ❑ 2005-2006 EDEExpress Release 2 Desk
Reference available March/2005
- ❑ 2005-2006 COD Technical Reference is
available now

Technical Assistance

We appreciate your feedback and comments.

CPS/SAIG Technical Support:

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