

Session #13

Using EDExpress for Direct Loan Processing Hands-On

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U.S. Department of Education



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Agenda

- What is EDEExpress?
- How Can I Use EDEExpress to Process Direct Loans?
 - Setting It All Up
 - How Do I Create All of These Loans?
 - What About MPNs?
 - How Do I Get All of These Loans to COD and Back Again?
- Can I Use EDEExpress With My School's Other Systems?
- Where Do I Get Help?
- Let's Get Into EDEExpress

What is EDExpress?

- **App Express:** Interfaces with the FAA Access to CPS Online Web site; import, store, view, and print ISIRs
- **Packaging:** Package student financial aid awards
- **Pell:** Create Pell Grant, ACG and National SMART Grant records, and process data through COD
- **TEACH Grant:** Create TEACH Grant records and process data through COD
- **Direct Loan:** Create Direct Loan records and process data through COD



How Do I Process Direct Loans?

In EDExpress you can:

- Originate loans
- Print MPNs
- Create disbursements
- Print reports
- Send and receive data to/from COD



Setting It All Up

- COD School Setup
 - Enter information about your school
- COD System
 - Enter your Source Entity ID
 - Do you want to send DL records to COD combined with Pell and/or TEACH records?
- COD Disbursement Profile
 - A different profile for each student group with similar loan periods, academic year, and anticipated disbursement dates
 - Will the same profile work for DL, Pell and TEACH?

How Do I Create These Loans?

Create or update Direct Loans by:

- Manual Entry

The screenshot displays the '2009 - 2010 EDEXPRESS for Windows' application. The 'Direct Loan' tab is active, showing 'Borrower Loan Information' and 'Loan Info' sections. A confirmation dialog box titled '2009 - 2010 EDEXPRESS for Windows' with a yellow warning icon and the text 'Loan Originated.' is overlaid on the main window. Three red arrows point to specific areas: one points to the 'Loan ID' field (555667777S10G23456001), another points to the 'MPN Print Indicator' dropdown (set to 'S'), and a third points to the 'MPN Acknowledgement Date' field.

Borrower Loan Information:

- DL Code: G23456
- AN EDEXPRESS TRAINING SCHOOL
- Disbursement Profile Code: -R [UP_...]
- Loan Period: -R 08/23/2009 to -R 05/03/2010
- Academic Year: 08/23/2009 to 05/03/2010
- Dependency Status: D
- Loan Amount Approved: 4,500
- CPS Transaction #: 01
- Borrower's Loan Default/Grant Overpayment: N
- College Grade Level: 2
- Created By: USER1 On: 10/22/2009 At: 16:27:21
- Last Updated By: USER1 On: 10/22/2009 At: 16:27:21
- E-mail Address 1:
- E-mail Address 2:
- Loan ID: 555667777S10G23456001 1 of 1

Loan Info | PLUS Info | Credit Info | Change History

MPN Information:

- MPN Status: T Manifest Document ID:
- MPN Expiration Date: Manifest Date:
- MPN Print Date: Signed MPN Received: / /
- MPN Print Indicator: -R S MPN Acknowledgement Date:

Loan Information:

- Origination Date: 10/22/2009 Origination Status: R
- Origination Reject Codes:
- Origination Document ID: Transmission #: 0
- Last Change Document ID: Export to COD: Y
- Booked Document ID:
- Export to External: Y
- Inactive Loan? Inactive Loan Date: / /
- Booked Status:
- Booked Date:
- Disclosure Statement Print Indicator: S Fee Percentage: 01.500
- Disclosure Printed Rebate Percentage: 01.000
- Record Source: M

2009 - 2010 EDEXPRESS for Windows

! Loan Originated.

OK

Demo | FAFSA | Student Inquiry | Docs | Notes | User Data | Origination | Disburse | Awards

For Help, press F1. C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS 2009-2010\expres90.mdb



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More Ways to Create Loans

- Also create or update Direct Loans by:
 - ISIR Import
 - Packaging Import
 - External Add/Change Import
 - Multiple Entry
 - Rebuild

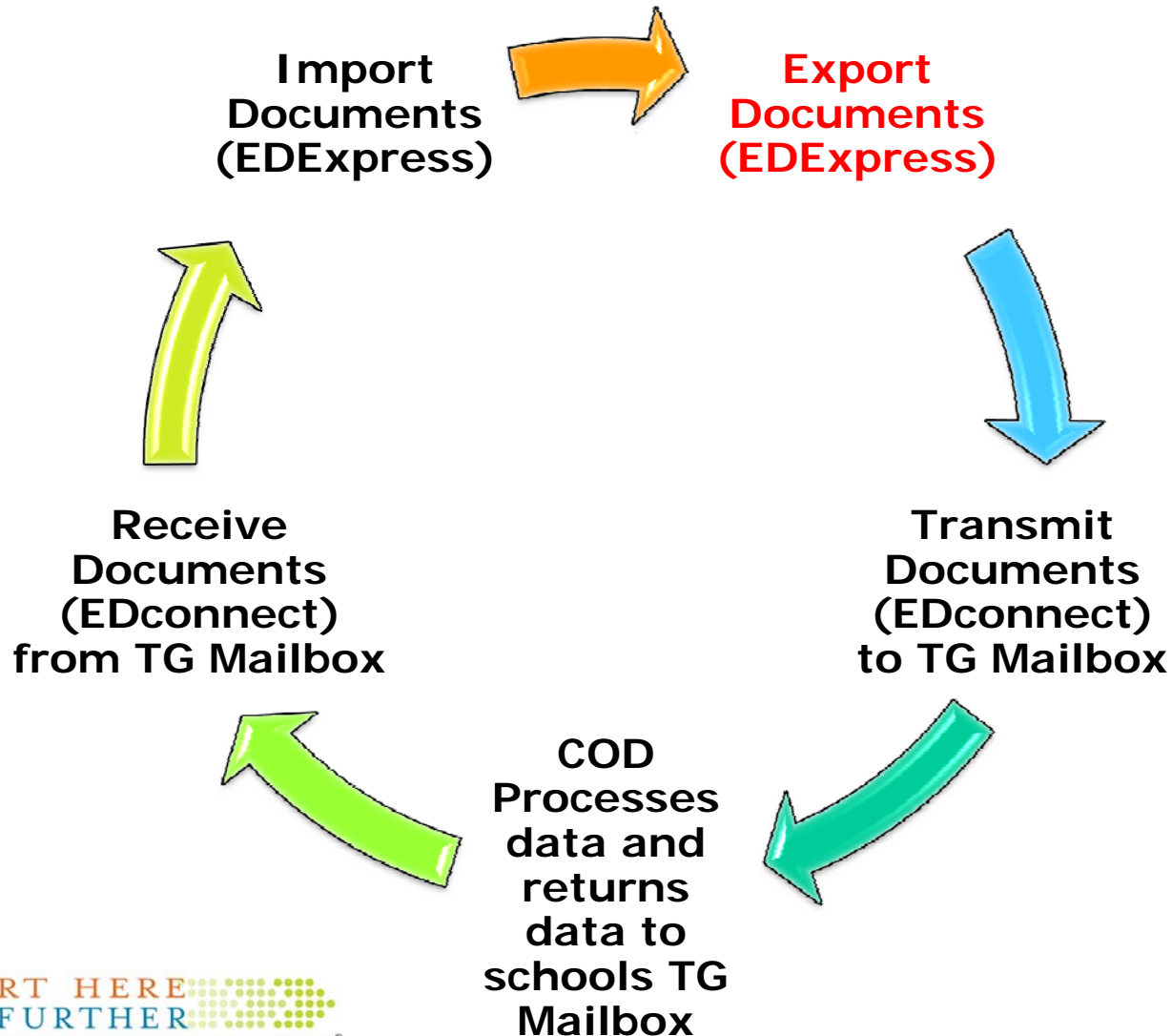
What About MPNs?

- EDExpress can determine if a loan should be associated with an existing MPN (linked to an MPN)
- Request that COD print and send to borrower or to school **or** print MPNs using EDExpress
- Student can also complete online eMPN at dlenote.ed.gov

To COD and Back Again

- Export Direct Loan origination and disbursement records to a Common Record document file
- Do you want to send DL records to COD combined with Pell and/or TEACH records?
- Transmit to and from COD using SAIG
- Import the Common Record response containing processed results from COD

To COD and Back Again



EDExpress and Other Systems?

- Prepare data files from your school's system using record layouts in the COD Technical Reference, Volume III, Section 3 (Combination System Record Layouts)
- Import the file into EDExpress
- Export only the data you need for your system

Where Do I Get Help?

www.ifap.ed.gov:

- Webinar Training
- Computer Based Training (CBT)
- Publications

Where Do I Get Help?

EDEExpress:

- Desk References
- Cover Letters
- Installation Guides
- Help Text
- School Electronic Process Guide

Where Do I Get Help?

CPS/SAIG Technical Support:

- Phone: 800/330-5947
- TDD/TTY services: 800/511-5806
- Email: CPSSAIG@ed.gov
- Representatives are available Monday through Friday, 8 a.m. to 8 p.m. ET

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Let's Get Into EDExpress

- Three Tracks in Hands-on Exercises
 - New to EDExpress
 - New to Direct Loan
 - Advance Placement