



Electronic Access Conference **2000 GET CONNECTED**



We Help Put America
Through School

Student Financial Assistance

Session 17

Pell Hands-On #2

Managing Exceptions and Creating Meaningful Exceptions Reports EDExpress Pell Payment



Introduction

- This session concentrates on how to effectively use EDExpress to identify exceptions records and reconcile Pell data.
- Evaluations
- Questions



Agenda

- Pell Query Module Overview
 - Basic Query Functions
 - Highlight of Important Query Fields
- Hands-On Exercises

Basic Query

- Parameter or (Prompt at Execution)
- Parenthetical Statements
- Value Help



Parameter Query


Global App Express Packaging Direct Loan Pell

Title:
ORIGINATION STATUS =PARAMETER

Field: ORIGINATION STATUS Operator: = Value: ☒ Prompt at Execution

Append Remove Change And Or Value Help

Criteria 2000 - 2001 EDExpress for Windows

 Valid values are N = Not Ready, R = Ready, B = Batched, A = Accepted, E = Error and T = Transfer.

OK

Remove Right

NEW RECORD

Add Delete Save Retrieve...

OK Cancel Help



User Enters Value

Parameter Query Entry

QUERY TITLE: ORIGINATION STATUS =PARAMETER

This parameter query allows you to access records from the database based on values that you specify. Please fill in values (parameters) for the following fields:

Field Name	Operator	Field Value	List Field Value
ORIGINATION STATUS	=	E	

OK Cancel Help Value Help View Query



Parenthetical

Query

Global App Express Packaging Direct Loan Pell

Title:
UPDATED ORIGINATION READY

Field: RFMS STATUS Operator: Value: ☐ Prompt at Execution C_

Append Remove Change And Or Value Help

Criteria:

(ORIGINATION STATUS = "R") AND
((RFMS STATUS = "A") OR
RFMS STATUS = "C")

Add Left (Add Right)
Remove Left (Remove Right)

NEW RECORD
Add Delete Save Retrieve...



Important Fields

■ Edit/Comment Codes:

- Use Like and Not Like operators instead of =, <>, ... unless using Null value
- Origination Edits/Comments Returned by RFMS
- Disbursement Comments

■ Null - leave field blank and Append - can be useful.



Origination Status

■ EDExpress Origination Record Status

- N = Not Ready
- R = Ready
- B = Batched
- A = Accepted
- E = Rejected (Error)



RFMS (Origination) Status

- RFMS Origination Status returned on Origination Acknowledgement or Year to Date File
 - A = Accepted
 - C = Corrected
 - E = Rejected (Error)



Disbursement Status

■ EDExpress Disbursement Record Status

- R = Ready
- B = Batched
- A = Accepted
- E = Rejected (Error)



RFMS Disbursement Status

- RFMS Disbursement Status returned on Disbursement Acknowledgement or Year to Date File
 - A = Accepted
 - C = Corrected
 - E = Rejected (Error)



Further Assistance

- Questions About The Pell Module Of The EDExpress Software Should Be Referred To CPS Customer Service At 1-800-330-5947, Option 4
- Questions About The Electronic Transmission Process Should Be Referred To Title IV WAN Customer Service At 1-800-615-1189



Further Assistance

- Questions About The Pell Process, Rejected Batches Or Account Information Should Be Referred To RFMS At 1-800-4-P-Grant (1-800-474-7268)

Hands On!

- Please remember to always set print options to “Screen”
- We’re here to help, just flag us down.
- The Computer Lab is a great resource - feel free to drop in with any questions or issues.

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Please Remember Evaluations

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