Electronic Access Conference
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Student Financial Assistance

Session 11

Managing EDExpress

from a School's Perspective

Introduction

- Who this session is geared towards
- Evaluations
- Questions

Presenter

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School and Staff Profile

- 12,500 undergraduate students

- 2,500 graduate students

- 6,000 receive financial aid

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School and
Staff Profile (cont.)

- 1 Director

- 1 Assistant Director

- 1 Coordinator

- 1 Accountant

- 3 Financial Aid Counselors

- 1 Office/Loan Supervisor

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School and Staff Profile (cont.)

- 2 Loan Processors

- 1 Perkins Loan Processor

- 1 Verification Specialist

- 1 College Work-Study Assistant

- 1 Pell Grant/FAT/NSLDS Assistant

- 1 Emergency Loan Processor

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School and Staff Profile (cont.)

- 1 Secretary

- 1 Receptionist

- 1 File Room Clerk

- 1 Switchboard Operator

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FAFSA Completion

- **January**
  - Students begin filing FAFSAs
  - Encouraged to use FAFSA on the Web
  - Workstations provided in a Financial Aid Computer Lab
  - Staff available for assistance

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FAFSA Completion

■ **February**

– Begin importing ISIRs

– Send out Missing Information Letters for required documentation

– Verification Specialist begins reviewing ISIRs to resolve "C Flags" and conflicting information (use queries to find most common codes)

ISIR Receipt

- ISIRs imported weekly into EDExpress and third-party software

- Initial letter sent to students requesting needed documentation immediately after import.

- Follow-up letter for needed documentation sent 35 days after initial letter.

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ISIR Review

- ISIRs reviewed and issues resolved by Verification Specialist

- Student notified if further resolution required

- Corrections imported and exported 1-2 times a week (depending upon time of year)

ISIR Corrections

- ## Correction Processing
  - Quick Corrections entered by Counselors and/or Verification Specialist and transmitted 1-2 times weekly by Verification Specialist
  - Verification Specialist prints a list of pending corrections, and reviews those she did not enter

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Packaging Process

- Counselors use third-party software to determine aid package

- Loans packaged and sent to state guarantor using third-party software

- Student folder created once Award Notification returned

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Pell Process

- Report created from third party software of those students packaged by each program

- List of Pell students given to Pell Assistant to enter information on Pell Grant tab to create Origination Record

- If within 30 days of disbursement, information entered on Disburse tab

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Pell Process (cont.)

- Export and Transmit Origination Data and Disbursement Data

- Import Origination and Disbursement Acknowledgment files and resolve any MRR files received

- Weekly: Run report to list Pell monies actually disbursed and make any necessary corrections

Pell Process (cont.)

- Monthly: Run Pell Origination List and YTD Disbursement List within EDExpress for reconciliation with school records

- End of Year: Request a detailed YTD file to reconcile RFMS with EDExpress of all Origination and Disbursement records by transactions

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Presenter

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School and Staff Profile

- 13,000 undergraduate students

- 1,500 receive financial aid

School and Staff Profile (cont.)

- 1 Financial Aid Director

- 2 Financial Aid Specialists

- 1 Financial Aid Accounts Clerk

- 1 Financial Aid Technician

- 1 Financial Aid Computer Specialist

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FAFSA Completion

■ January

– Students begin filing FAFSAs

– Encouraged to use FAFSA on the Web

– Workstations provided in Counseling, Computer Lab, and Financial Aid Office

– Staff available for assistance

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ISIR Receipt

- ISIRs imported daily into EDExpress and third-party software
- Initial letter sent to students requesting needed documentation
- Create financial aid folders for students

ISIR Review

- ISIRs reviewed and issues resolved by specialist

- Student notified if further resolution required

- Corrections imported and exported daily

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Packaging Process

- Specialists use third-party software to determine aid package

- Loans packaged and sent to state guarantor using third-party software

ISIR Corrections

- **Correction Processing**
  - Quick Corrections entered and transmitted daily by Computer Support Specialist
  - SAR/ISIR tab used to enter corrections with FAA Adjustments or when EFC calculation required.

Queries

■ Use queries to target a specific population of students

-Printing ISIR's imported

-Importing ISIR's into Pell

-Using Mutiple Entry process

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Operational Suggestions

- Backup database daily

- Run database utilities at least weekly

- Verify transmission in EDconn32 activity log

- Get on SFATECH e-mail listserv

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Why use EDExpress

- Convenient and reliable platform for receipt and correction of student ISIR information

- RFMS module for Pell reporting

- Good support

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Further Assistance

CPS Customer Service can be reached by

      Phone: 800-330-5947

      Email: cps@ncs.com

Or SFATECH: sfatech@inet.ed.gov

We appreciate your feedback and comments

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Questions?