Electronic Access Conference
2000 GET CONNECTED

Student Financial Assistance

We Help Put America
Through School

Electronic Access Conference
2000 GET CONNECTED

2001-2002 EDE Technical Reference Document Review and Layout Changes

We Help Put America
Through School

Introduction

- Who this session is geared for?
- Evaluations
- Questions

Agenda

- What is the EDE Technical Reference?

- Where can I get the EDE Tech Ref?

- Structure of EDE Tech Ref

- As You Requested!

Agenda (Cont.)

- **Message Classes**

- **Summary**

- **Further Assistance**

- **Questions**

What is the EDE Technical Reference?

- ■ What is it?

  – Reference tool explaining the electronic data exchange (EDE) process with the Central Processing System (CPS)

  – Map describing what to expect in each position of a file or a long string of alpha and numeric characters

What is the EDE Tech Ref? (Cont.)

- **Who is it used by?**
  - Schools in the programming area or financial aid office
  - State agencies
  - Third Party Servicers
  - CPS
    - Customer service
    - Development departments

Where Can I get the EDE Tech Ref?

- Go to www.sfadownload.ed.gov

- Select References and Documentation from Blue Column on Left side of screen

- Under Electronic Data Exchange Technical Reference select 2001-2002

- Select either a MS Word or Adobe PDF document

  - www.ifap.ed.gov

Electronic Access Conference
2000 GET CONNECTED

We Help Put America Through School

Structure of EDE Technical Reference

- **Table of Contents**

- **Overview, section 1**
  - Explains the different EDE processes
  - What's New and What's Changed for 2001-2002
  - Sources of Assistance- lists phone numbers and email addresses

We Help Put America
Through School

Structure of EDE Tech Ref (Cont.)

■ **EDE Processing, section 2**

– Provides more detail to the overall electronic data exchange (EDE) processing

– Step by step instructions for doing the different process

- How to make a duplicate request
- How to add your school code to a student's record

We Help Put America
Through School

Structure of EDE Tech Ref (Cont.)

- ## Record Layouts, section 3
  - The Record Layout section is a map to read the data sent by the CPS, or a map of what the CPS is expecting to receive
  - EDExpress has the record layout logic written into the program

Electronic Access Conference
2000 GET CONNECTED

We Help Put America
Through School

Structure of EDE Tech Ref (Cont.)

■ **Record Layouts, section 3 (Cont.)**

– New layout HOLD02OP; file of all student's applications who listed your school that are on hold at CPS waiting for appropriate signatures

- Demographic info
- Date added to Hold file
- Electronic App Entry Source
- Signed By
- Model

Record Layout Lengths

Record Layout	Length in 2000-2001	Length in 2001-2002
Header Record	85	85
Trailer Record	109	109
EDE Batch Level Rejects	109	109
EDE Record Level Rejects	109	109

Record Layout Lengths (Cont.)

Record Layout	Length in 2000-2001	Length in 2001-2002
Type 2 Individual RAD request	109	109
RADD Request Address 1	109	109
RADD Request Address 2	109	109
RAD Import Record	525	460
Initial App/Renewal App	620	650

We Help Put America
Through School

Record Layout Lengths (Cont.)

Record Layout	Length in 2000-2001	Length in 2001-2002
ISIR	2735	2850
History Correction	450	580
Duplicate Request	450	580
FDR Request	450	580
Signature Records	450	580
Hold file records	N/A	150

Structure of EDE Tech Ref (Cont.)

- **Processing Codes/System Requirements, section 4**
  - 2000-2001 to 2001-2002 ISIR Cross-Reference
  - Table of Reject Codes and How to Respond to Each
    - Deleted Reject 20
    - 14 - Missing student signature
    - A - Date of birth year equals 1900, 1901 or 1902
    - C - Taxes paid equal Adjusted Gross Income

Structure of EDE Tech Ref (Cont.)

■ Processing Codes/System Requirements, section 4 (Cont.)

- – Error Messages with code and text
- – Assumption Overrides
- – Comment Codes
- – SAR/ISIR Correction Flags and Correction/Highlight Field Number

Structure of EDE Tech Ref (Cont.)

- Processing Codes/System Requirements, section 4 (Cont.)
  - NSLDS Codes
  - State/Country/Jurisdiction Codes
  - Correction Data Entry Specifications

Structure of EDE Tech Ref (Cont.)

- **Printing, section 5**

  - Layouts for printing ISIRs and Renewal Applications to ED specifications

  - Describes assumptions, highlights, comments, signed-numeric values, rejects and how to print them

  - Sample output documents

Changes to the Printed ISIR

- ## ISIR Page 1
  - Changed year reference on each page
  - Page number moved from top to bottom
  - Trankey prints

We Help Put America
Through School

Changes to the Printed ISIR (Cont.)

- ## ISIR Page 2
  - Examples of Label changes
    - Enrollment plans
    - Legal Residence Date
    - Grade Level in College
    - Father's/Stepfather's SSN
    - Adjusted Gross Income
    - Total from Worksheet A
    - Total from Worksheet B

Changes to the Printed ISIR (Cont.)

- ## ISIR Page 2 (Cont.)
  - ### Examples of Print Instruction changes
    - Driver's License #
    - Marital Status
    - Enrollment Plans
    - Father's Educational Level
    - Grade Level in College
    - Tax Return Filed
    - Eligible to File 1040A or 1040 EZ

We Help Put America
Through School

Changes to the Printed ISIR (Cont.)

- ISIR Page 2 (Cont.)
  - Deleted
    - Have Driver's License?
    - Net Worth of Investment Farm
    - Earned Income Credit for Student and Parent's
  - Added
    - E-mail Address
    - Have Children You Support?
    - Total from Worksheet C for Student and Parent's

Electronic Access Conference
2000 GET CONNECTED

We Help Put America
Through School

Changes to the Printed ISIR (Cont.)

- **ISIR Page 2 (Cont.)**
  - Step labels changed
  - Drug Conv Affecting Elig? renamed and moved
  - Cash, Savings and Checking moved
  - Added @ description in footer

We Help Put America
Through School

■ ISIR Page 3

- – Label changes
  - School #
  - Housing #
  - Federal School Code Indicator
  - Paid EFC Type

Changes to the Printed ISIR (Cont.)

- **ISIR Page 3 (Cont.)**
  - Print Instruction changes
    - Signed By
    - Application Source
    - Dependency Override
    - FAA Adjustment

We Help Put America
Through School

Changes to the Printed ISIR (Cont.)

■ **ISIR Page 3 (Cont.)**

– Added

- Duplicate SSN Flag
- INS Sec. Conf. Flag

– Switched Application Receipt Date and Transaction Receipt Date locations

– Added @ description in footer

We Help Put America
Through School

Changes to the Printed ISIR (Cont.)

- ## ISIR Page 4
  - Text changed to reflect certification page changes

Changes to the Printed ISIR NSLDS Page

■ **NSLDS Page 1 and 2**

– Added title across top of page 2001-2002 Institutional Student Information Record

– Changed year references

– Changed format of Processed date from MM-DD-CCYY to MM/DD/CCYY

We Help Put America Through School

Changes to the Printed ISIR NSLDS Page (Cont.)

■ NSLDS Page 1 and 2 (Cont.)

– Increased field length for Pell EFC

- Scheduled Amount

- Award Amount

- Amount Paid

- Remaining Amount Paid :

Changes to the Printed ISIR NSLDS Page (Cont.)

- **NSLDS Page 1**
  - Label Changes
    - Subsidized Loans:
    - Pell Verification Flag
  - Added Fields
    - Extra Unsub
    - Capitalized Interest

We Help Put America Through School

Changes to the Printed ISIR NSLDS Page (Cont.)

■ **NSLDS Page 1 (Cont.)**

– Print Instruction Changes

• Overpayment values of D and W added for:

– NSLDS Pell Overpayment Flag

– NSLDS SEOG Overpayment Flag

– NSLDS Perkins Overpayment Flag

Changes to the Printed ISIR NSLDS Page (Cont.)

- **NSLDS Page 2**
  - Added a line of asterisks
  - Added page number at bottom of page
  - Added Fields
    - Extra Unsub
    - Capitalized Interest
    - MPN Information
      - Direct Loan MPN:
      - FFEL MPN
      - FFEL MPN Lender Code

Structure of EDE Tech Ref (Cont.)

- **Miscellaneous, section 6**
  - Provides additional information necessary to assist user in the EDE implementation process
  - Message Classes
  - Optional testing procedures with test cases
  - Removed the ISIR change list
- **Index**

As You Requested!

- **More space for first name and street**
  - i.e. Christopher and foreign addresses
- **Modified values**
  - Grade Level
  - Tax Return Filing Status
  - Eligible to File 1040A or 1040EZ

As You Requested! (Cont.)

- Correction flags

- Master Promissory Note (MPN) flags for DL and FFEL

- State agencies will get NSLDS info on ISIR

We Help Put America
Through School

Message Classes

- Year increased from 01 to 02

- New HOLD02OP

- Modified Correction ISIR and Correction Error file names
  - Instead of,

    SARR02OP -- changed to CORR02OP
    SARE02OP -- changed to CORE02OP

We Help Put America
Through School

Message Classes (Cont.)

- Modified resident and non-resident state agency ISIR file names
  - <u>Resident</u> ISIRs

    Instead of YTDN02OP -- YTD<u>R</u>02OP
  - <u>Non-resident</u> ISIRs

    Instead of YTDF02OP -- YTD<u>N</u>02OP

We Help Put America
Through School

Summary

- **What is the EDE Technical Reference?**
  - What is it used for?
  - Who uses it?
- **Structure of the EDE Technical Reference**
  - 8 Sections
- **As You Requested!!!**
- **Message Classes**

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.

Electronic Access Conference
2000 GET CONNECTED

We Help Put America
Through School

Electronic Access Conference
2000 GET CONNECTED

Questions?

We Help Put America
Through School