Effective Techniques for Using EDExpress Packaging (Hands-On)

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Introduction

- This session is designed for beginning or novice users of EDExpress Packaging
- Evaluations
- Questions

What is Packaging?

- Efficient, flexible method of awarding funds to student records and generating award letters

- Interacts with Apps, Pell and Direct Loan modules

- Can import data from and export data to external system(s)

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Agenda

- Setup Planning

- Packaging Setup Basics

- Creating Records

- The Package Process

- Printing Award Letters

- Hands-on Exercises

Setup Planning

- Identify your office needs and assess what you need Packaging to do for you

- Gather all relevant information on available funds, awarding schemes, COA for different student groups

- Write it out --- use Packaging setup sheets

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Academic Year Profile

- Determines how awarded fund totals are split between terms
- Defines how Pell is awarded: select formula type, percentages
- Required for ISIR import

Fund Maintenance

- Create fund profile for each federal, state, local or private aid source to be awarded
- Use queries and Remaining Need to restrict awarding
- Use correct aid type!

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Award Methodologies

- Tell EDExpress how to award defined funds to different student groups

- Use Priority field and queries to filter methodologies

- Use Self-help, Gift-aid limit fields to set award ceiling for certain aid types

- Establish Cost of Attendance amounts for different student populations

- Assign either during ISIR import or from Process menu

- Use Priority and queries to control assignment

Creating Records

- ## ISIR import
  - Will only import valid ISIR data
  - Most time-efficient, accurate method
- ## Manual entry
- ## External import add

Packaging Records

- Package from Awards tab or Globally

- Will award Pell first, then run through methodologies in priority order

- View Awarded Funds screen to examine results of Package process

- Unpackage/Repackage functions

Award Letters

- Print Globally or from Awards tab
- Record must have fund(s) awarded
- Offer and Notification letter options
- Some letter text can be modified

Hands-On Exercises

Further Assistance

We appreciate your feedback and comments. We can be reached:

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SFATECH web site:

www.ed.gov/offices/OSFAP/sfatech

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Questions?