Connect For SUCCESS

U.S. Department of Education
1998 Electronic Access Conferences

Session 11

EDExpress Packaging:

What can it do for me?

What is Packaging?

- Efficient, convenient means of converting student data into completed award

- Users can track fund balances, print award letters, award funds manually or

- Reduces busywork, automates time-

Session Agenda

- Before you start…

- Setup Basics

- Creating Packaging Records

- The Package Process

- Award Letters

- Reports and Lists

Before you start...

- Identify your office needs, assess what you need EDExpress to do for you

- Gather all relevant information on available funds, awarding schemes, COA's

- Write it out --- use Packaging setup sheets

Setup Basics

- Each setup screen defines an aspect of how you award aid to your students

- Flexibility of setup --- simple or complex?

- Testing and tweaking

Queries

- Define all potential selection criteria, student groups, restrictions

- Create queries first to save time and

Academic Year Profile

- Determines how awarded fund totals are split amongst terms

- Defines how Pell is awarded: select formula type, percentages

- Select most common AYP as default

- Required for ISIR import

Fund Maintenance

- Create fund profile for each federal, state, local or private aid source to be awarded

- Use accurate beginning balances for precise tracking of awarded funds

- Attach queries to restrict awarding

- Use correct aid type!

Award Methodologies

- Define various awarding schemes: Which groups get which set of funds first?

- Priority field and queries filter methodologies students are run through

- Can use self-help, gift-aid limit fields to set award ceiling for certain aid types

Budgets

- Establish Cost of Attendance for different student populations

- Assigned automatically during ISIR import

- Use priority field, queries to control

- Can manually adjust components on

SAP

- User-defined indicator for tracking Satisfactory Academic Progress

- Use manual entry, multiple entry or external import to assign

- SAP codes can restrict ability to package; unlimited number of codes can be created

Creating Packaging

Manual Entry

- File/New: Create and save Demo record to activate Awards tab

- Populate all relevant fields to prepare record for packaging process

- Pell EFC will default to 99999

- If all required fields are filled, record(s) will be set to "R" (ready to package) status
- Use selection criteria to filter import records

External Add

- Create Packaging records on external system and import in External Add file

- Record layouts listing import file format can be printed from Packaging print menu

- Update existing records using External

Packaging Process

- All required elements must be present for Package process to run

- Package globally or within student record

- Process awards Pell first (if defined as fund), then determines proper methodology

Packaging Process

- New Packaging statuses: "H" (hand-packaged) and "M" (manually adjusted)

- Can manually add or adjust funds awarded before or after Package process on Awarded Funds screen

- Global selection criteria includes new sorting by date options

Award Letters

- Print globally or from Awards tab
- Must have at least one fund awarded
- User-defined text can be created, will print

- New letter choices: Notification and Offer

Reports and Lists

- Lists provide variety of views of data: unpackaged students, packaged students by SSN, last name, EFC, fund code

- Fund reports show balances, awarded amounts, student tallies

- FISAP reports available

- Can print Packaging records, setup

Questions?

Thanks!

Please complete feedback forms!

For a more extensive demonstration of Packaging software, please visit the PC

Thank you for attending!!