



U.S. Department of Education
1998 Electronic Access Conferences



Session 13

EDExpress Pell Payment for Windows --- Part I



Pell Payment in EDEExpress

- Pell is now a module in EDEExpress
- Two tabs related to Pell
 - Pell Grant Tab
 - Disbursement Tab



Session Agenda

- Importing Data
- Pell Grant Tab
- Reports
- Message Classes
- Transfer Data



Importing Data

- Only one transaction per Attended Campus
- Which transaction will import?
 - Transaction Paid On (Demo tab)
 - Active Transaction (ISIR Rvw tab)



Pell Grant Tab

- **Origination Record**
 - Only 1 per Attended Institution
 - All changes made to this record
 - Scroll through multiple origination records for multiple Attended Institutions



Pell Grant Tab

■ New Fields

– Origination ID

- Original SSN
- Name Code
- Year Indicator (2000)
- Attended Institution Code
- Origination Sequence Number (00)



Pell Grant Tab

■ New Fields

– Origination Status

- N = Not Ready
- R = Ready
- B = Batched
- A = Accepted
- E = Error
- T = Transfer



Pell Grant Tab

■ New Fields

– RFMS Status - Acknowledgements

- A = Accepted
- C = Corrected
- E = Rejected
- MRR Status



Pell Grant Tab

■ New Fields

- Scheduled Award
- Award Amount for Entire School Year
- Total of Disbursement Amounts
- Low Tuition and Fees
- Estimated Disbursements Dates 1-15



Pell Grant Tab

■ Changes to Valid Field Content

– Enrollment Status

- 1 = Full-time
- 2 = 3/4 time 3 = 1/2 time
- 4 = Less than 1/2 time 5 = Other

– Secondary EFC Code

- O = Award based on Secondary EFC
- S = Award previously based on Secondary EFC



Pell Grant Tab

- **Methods of Entry**
 - Import Origination Data - ISIRs
 - Import Origination Data - External



Pell Grant Tab

- Changes to View Menu
 - View Payment Schedule - moved to help text
 - View Eligibility Used - still in View menu
 - View Transfer Data - removed; now an origination record with status T (Transfer)
 - View User Defined Fields - moved to Global



Pell Grant Tab

- Changes to View Menu
 - View Notepad - moved to Global Notes
 - View Created By/Last Updated By - added to
 - View Original Data - removed
 - View Edits/Comments - still in View menu
 - View ED Flags



Reports

■ New Reports

- Origination Record
 - Print Edits/Comments?
 - Print Disbursement Information?
- List - Origination Records
- List - Disbursement Records



Reports

- New Report
 - Students by Payment Period
- Renamed Reports
 - Batch Activity List (formerly Status of Batches)
 - Transfer Data (formerly Transfer Overaward)



Reports

- Carryover Reports
 - Edits/Comments by Student
 - ESOA
 - Batch Summary
 - SSN/Name Difference
 - Record Layouts



Message Classes

- PGOR00IN - Origination Record (#O batch
- PGOA00OP - Origination
Acknowledgement Record (#O batch type)
- PGDR00IN - Disbursement Record (#D
- PGDA00OP - Disbursement
Acknowledgement Record (#D batch type)



Message Classes

- PGSP00IN - Special Disbursement Record
- PGSD00OP - Special Disbursement Acknowledgement Record (#S batch type)
- PGSA00OP - Electronic Statement of Account Records (#A batch type)
- PGEO00OP - External Origination Add
- PGED00OP - External Disbursement Add



Message Classes

- PGID00IN - Institution Data Record (#I
- PGIA00OP - Institution Data Acknowledgement Record (#I batch type)
- PGRQ00IN - Data Request Record (#R
- PGRA00OP - Data Request Acknowledgement Record (#R batch type)



Message Classes

- PGMR00OP - Multiple Reporting Response Record (#M batch type)





Transfer Data

- Transfer Data Utility Removed
- Creating Transfer Records
 - Manual Entry
 - Importing RFMS-Initiated MRR (Multiple Reporting Response) File



Manual Entry

- Select Add button on Pell Grant tab
- Mark option “Create Transfer Record?”
 - Scheduled Award
 - Total of Disbursement Amounts
- Enter Award Amount for Entire School Year and Enrollment Date
- All other fields left blank and disabled



Manual Entry

- Origination status will be T (Transfer)
- RFMS status will be blank
- No Total Payment Ceiling calculated
- No View Edits/Comments
- May delete a manually created Transfer



Questions?

- Questions about the Pell module of the EDEExpress software should be referred to CPS Customer Service at 1-800-330-5947,
- Questions about the electronic transmission process should be referred to Title IV WAN Customer Service at 1-800-



Questions?

- Questions about the Pell process, rejected batches or account information should be referred to RFMS at 1-800-4-P-GRANT.