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U.S. Department of Education
1998 Electronic Access Conferences

Session 27

Student Aid File Preparation Using EDExpress

Session Objectives:

- Discuss preparing a Student Aid File

- Look at the tools in EDExpress that will assist you in this process

Student Aid File

- Valid ISIR

- Verification Worksheets

- Document Tracking Letters

- Other important documents

Session Topics

■ **Working with the ISIR**

– Correcting the ISIR

– Using Quick Correction

– Verification Worksheet Tab

– The New ISIR Review Tab

Session Topics

- Query

- User Database

- Document Tracking
  - Setup
  - Updates
  - Printing

- User-Defined Letters

- Labels

Working with the ISIR

■ FAFSA is processed and the ISIR imported

■ ISIR needs to be corrected

- – SAR/ISIR tab

- – Quick Correction

- – Verification Worksheet

SAR/ISIR Tab

■ Method to view entire ISIR

■ Go to appropriate field and enter correction

■ Do not need to have ISIR on file to do the

Quick Correction

- Accessed from Process menu from main

- Enter SSN, Name ID, Transaction #

- Originating Institution defaults to Assumed Institution but can be changed

- Make the corrections

How can it help me?

- Very fast way to do corrections
- Particularly handy for adding your institution on to the ISIR record--just add DRN and school code and record is ready

Verification Worksheet

- View any transaction on file in ISIR column

- Enter in verified data in Tax/Wrksht column

- Any discrepancies are marked in Diff

Verification Worksheet

- "Correct" button creates a correction record

- The data in the Tax/Worksheet column is used as the corrected data

How can it help me?

- Allows you to process verification worksheets easily

- Any students on system can be verified, not just those selected by CPS

- Make corrections to discrepancies and automatically marks them ready for export

ISIR Review Tab

- New for 1999-2000

- Allows you to compare two ISIR transactions

- Flags any differences

- Determine which ISIR contains the most accurate information

- ISIR Review Tab allows you to select the Active Transaction

- EDExpress considers the Active Transaction to be the "correct transaction"

Active Transactions

■ Active Transaction will be the ISIR used by the system when the record is imported into Packaging, Direct Loan, or Pell

■ Selecting Process|Activate Transaction from the menu bar sets the Active

How can it help me?

- ISIR Review tab will show changes made between one transaction and another

- Active Transaction ensures all records created by an ISIR import use the same

Queries

- Queries are an essential part of working in

- Allow you to limit the number of records you are working with

- Query has expanded considerably

Queries

- Using the Append button places your current entry into the query screen

- Modify existing queries

- "Nest" query phrases inside each other using parenthetical statements

User Database

- Define fields for your own use

- Store fields specific to your institution

- Useful for query purposes

Setup

■ Fields can be:

– (T) Text, up to 40 characters

– (L) Long Integer, 10 characters, numeric

(D) Date, 8 characters (MMDDCCYY)

(Y) Boolean, Y/N fields

■ Fields appear on the User Data tab

How can it help me?

- Helps you customize EDExpress
  - Scholarships with specific requirements

  If you can define it, EDExpress can query on it
- New for 1999-2000, the User Database can be updated through an external import

Document Tracking

- Keep track of important documents in the

- Common uses:
  - Tax returns
  - Institutional applications

Setup

■ **Auto Request**

– Makes document available for Add Documents

Assigned to all records that meet the criteria

Selecting Criteria

- **Criteria field**
  - Select any user-defined or predefined query
    Uses ISIR, and any User-Defined Database

- **Using queries is necessary for Auto Request documents or every student in your database will get the document**

Comment Codes

- You may select documents by entering up to six comment codes from the ISIR

- Document will be added to student record if any ISIR transaction contains the selected

Printing Letters

- You can send Document Tracking letters to students to request missing documents

- Setup options allow you to determine how many letters you want to send to a student or how long the system should wait between printing out letters

Using Document Tracking

- **Selecting Process|Add Documents from**

  - Adds document to any records that meet the

    If no criteria are listed, every student record will receive document

- **Manual entry**

  - Documents can be added at Docs tab

Docs Tab

■ Document Status

- – N, Not Received

- – R, Received

- – W, Waived

- – I, Incomplete

■ Received Date

■ New for 1999-00, Document Added Date

Updating Documents

- Update individual documents at the tab

- Use Multiple Entry

Multiple Entry

- Allows multiple students to be updated at

- Process|Multiple Entry from main screen
  - Document Tracking is a Global function

Multiple Entry

- Enter values to be applied to records

- Highly advisable to use Selection Criteria or all students get the update

- Can also update User Database and several other Demo tab fields

How Can It Help Me?

- Keep track of your important documents
- Query functions allow you to carefully select who gets documents
- Very flexible

Usable for any institutional needs

- Welcome letters
- Can be used with queries to address a particular segment of your population

Labels

■ File Folder Labels

  – Prints on two-across label sheets

■ Address Labels

  – Prints on one- or three-across label sheets

New Label Print

- "First Sheet Position Print" dialog box
- Select exactly where the label will print
  - Print in the correct sheet position

    Save label sheets

Creating the file

Johnny J. Student

- **User Database**
  - Create user-defined field of ALUMNI, a Y/N

    Mark ALUMNI field as Y on User Data tab or update fields using the Import User Data file

Query

- Create a Query based on ALUMNI = Y
- Running this query will give you any students that have this flag set to Yes

Document Tracking

- ## Create a document
  - Proof of Parental Attendance
- ## Query is attached to this document
  - When Process|Add Documents is run, all students with ALUMNI = Y will receive the

Johnny J. Student

- **User-Defined Letter**
  - Institutional welcome letter for alumni students
- **Query is used when printing letter**
- **Also use this query to print off Address Labels to prepare letters for mailing**

Final Thoughts

- EDExpress has a number of flexible tools

- Allows for a lot of customization of your system to your institutional needs

- To look more closely at the topics of today's discussion, stop down in the PC lab for a hands-on demonstration