
School Electronic Process Guide

FAA Access to CPS Online
ISIR Datamart
EDESuite
Return of Title IV Funds
ISIR Analysis Tool

2005-2006

U.S. Department of Education



**F E D E R A L
S T U D E N T A I D**

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Overview

Preface

The *School Electronic Process Guide* is designed to meet the reference needs of financial aid administrators (FAAs), programmers, and data processing staff. In this guide, we describe the following updates and enhancements for the 2005-2006 processing cycle:

- Message Classes
- What's New for FAA Access to CPS Online
- What's New for the Institutional Student Information Record (ISIR) Datamart
- What's New for EDESuite for Windows PC Software
 - EDEExpress for Windows Release 1 – Global functionality and Application Processing (App Express) and Packaging modules
 - EDEExpress for Windows Release 2 – Pell and Direct Loan modules
 - Direct Loan (DL) Tools for Windows
 - Student Status Confirmation Report (SSCR) for Windows
- Return of Title IV Funds (R2T4) on the Web
- ISIR Analysis Tool (Web)
- New Software and Hardware Requirements

We recommend you review all of the information provided in this guide related to the products and services you use, as some enhancements may require you to modify your office procedures and systems operations. Refer to the “Schedules” section for more details on the anticipated availability of these products.

Major Changes

The following major changes are implemented for the 2005-2006 processing cycle:

- **Annual Changes.** 2005-2006 EDESuite software products conform with annual changes to the FAFSA, ISIR, PIN, Direct Loan, Pell, and Common Origination and Disbursement (COD) processes. Annual changes to the FAFSA, ISIR, and PIN have also been implemented in the FAA Access to CPS Online Web site.
- **XML for Pell and Direct Loan.** In 2005-2006 all Pell and Direct Loan origination and disbursement data must be submitted to the COD system in Extensible Mark-up Language (XML) format using the Common Record layout.
- **New Software and Hardware Requirements.** New minimum and optimum software and hardware requirements are established for schools using EDEExpress for Windows and other Federal Student Aid (FSA) electronic products, effective January 2005, based on the September 2004 *Federal Register* notice (available on the IFAP Web site at ifap.ed.gov/fregisters/FR09142004).

In addition, we have taken into account in this year's product designs the many valuable suggestions and recommendations shared by our focus group panels, beta test participants, and Electronic Access Conference (EAC) attendees. We thank all of you who have provided input on our systems and software throughout the past year.

XML ISIR Implementation

FSA will not implement the XML ISIR for 2005-2006. FSA remains committed to XML as an effective tool to meet the current and future business needs of FSA, schools, and the community. In addition, we realize that a large benefit of XML is the creation and adoption of a community-based XML standard. However, we are not able to implement the XML ISIR at this time without significant impact to schools and other customers.

XML technology is the foundation for the shared services outlined in the FSA Data Strategy Initiative. Note the following:

- All schools are required to be full participants using the Common Record: COD for 2005-2006.
- The XML Registry and Repository for the Education Community will be made available in fall 2004. The XML Registry and Repository will house all XML schemas related to the Standards Forum for Education.

Watch for further information on the revised implementation schedule in early spring 2005. FSA is fully committed to community standards, which benefit all of us in the financial aid community. We look forward to the continuation of this endeavor.

Schedules

FAA Access to CPS Online and ISIR Datamart Schedule

The following schedule shows the release dates for 2005-2006 enhancements to the FAA Access to CPS Online Web site and the ISIR Datamart.

Product	Date of Release
FAA Access to CPS Online	January 1, 2005
ISIR Datamart	January 1, 2005

School Electronic Product Release Schedule

The following schedule provides release dates for the 2005-2006 EDESuite PC software on the FSAdownload Web site and the 2005-2006 version of the ISIR Analysis Tool Web application.

Product	Modules/Functionality Included	Month of Release
EExpress for Windows 2005-2006, Release 1.0	<ul style="list-style-type: none"> • Global functionality • Application Processing module • Packaging module 	January 2005
EExpress for Windows 2005-2006, Release 2.0	<ul style="list-style-type: none"> • Direct Loan module • Pell module 	March 2005
ISIR Analysis Tool 2005-2006	<p>The ISIR Analysis Tool Web site is designed for any school that wants to review and analyze its ISIR data and better understand certain characteristics about its Title IV applicant population and verification -- either federally selected or defined by the institution</p> <p>The ISIR Analysis Tool Web site enables schools to:</p> <ul style="list-style-type: none"> • Retrieve ISIR data from the datamart directly into the tool without having to create ISIR files • Draw sample aid recipient data easily by using the random sample functionality built directly into the tool • Run predefined analytic reports and create ad hoc reports 	June 2005

School Electronic Product Release Schedule (Continued)

Product	Modules/Functionality Included	Month of Release
Direct Loan Tools, Release 5.0	<ul style="list-style-type: none"> • Rebuild your Direct Loan origination and disbursement records in EDEExpress using an automated process • Compare the School Account Statement (SAS) report loan and disbursement data to loans and actual disbursements recorded in EDEExpress or an external file, and/or compare the SAS report cash data to the DL Tools Cash database • Print the SAS in a readable format • Cash Management utility 	July 2005

You can download EDESuite software and the related user documentation from the U.S. Department of Education’s Federal Student Aid Download (FSAdownload) Web site located at fsadownload.ed.gov.

The ISIR Analysis Tool is accessible through the FAA Main Menu of the FAA Access to CPS Online Web site (fafsa.ed.gov/faa/faa.htm) and from the View menu in EDEExpress for Windows 2005-2006.

Message Classes

2005-2006 ISIR Message Classes

The following table displays the ISIR data message classes used by the Central Processing System (CPS) for the 2005-2006 award cycle.

ISIR Type	Message Class	Description
Daily	IGCO06OP	Modified for 2005-2006! Daily ISIRs that are the result of correction records submitted by your school (includes ISIRs previously returned in the IDCO message class, which has been removed for 2005-2006)
Daily	IDAP06OP	Daily ISIRs that are the result of application records submitted by your school
Daily	IDSA06OP	Daily automatic ISIRs that are generated for all schools listed on the record except the school that submitted the application or correction Note: If you receive an ISIR in this message class, another school created a new transaction for the student and your school code was listed as one of the other five codes on the transaction.
Daily	IDRE06OP	Daily ISIRs for State Agency residents
Daily	IDNR06OP	Daily ISIRs for State Agency non-residents

2005-2006 ISIR Message Classes (Continued)

ISIR Type	Message Class	Description
CPS Pushed	IGSG06OP	<p>New for 2005-2006! Pushed ISIRs generated for all schools listed on the record that are a result of system-generated processing by the CPS</p> <p>Note: IGSG files are sent to schools when new transactions are system-generated by the CPS for circumstances such as reprocessing, NSLDS post-screening, or Department of Homeland Security (DHS) automated secondary confirmation</p>
CPS Pushed	IGSA06OP	<p>Pushed automatic ISIRs that are generated for all schools listed on the record except the school that submitted the correction (which now receives the record in the IGCO message class)</p> <p>Note: See the “ISIR Datamart” section later in this guide for more detail on CPS processing conditions that cause IGSA files to be generated.</p>
CPS Pushed	IGRE06OP	Pushed ISIRs for State Agency residents
CPS Pushed	IGNR06OP	Pushed ISIRs for State Agency non-residents
Requested	ISRF06OP	ISIRs requested directly from the ISIR Datamart
Errors	EAPR06OP	Error records from processing of Application data
Errors	CORE06OP	Error records from processing of Correction data
Errors	SIGA06OP	Error records from processing of Signature records

2005-2006 COD Message Classes

The following table displays the Common Origination and Disbursement (COD) system's export, import, and report message classes used by the EDEExpress for Windows 2005-2006, Release 2.0 software. You can also choose to receive data from COD in 2005-2006 message classes that do not include academic cycle indicators (although you will not be able to import these types of message classes into EDEExpress).

Schools with third-party or mainframe systems interested in using non-cycle-specific COD message classes should review the *2005-2006 COD Technical Reference, Volume II, Section 2*, available on FSADownload Web site, located at fsadownload.ed.gov.

Type	Program Affected	Message Class	Description
Export	Pell and Direct Loan	CRAA06IN	Common Record Document sent to COD
Export	Pell	PGRQ06IN	Pell Data Request sent to COD
Import	Pell and Direct Loan	CRAA06OP	Common Record Response sent by COD
Import	Pell and Direct Loan	CRRC06OP	Common Record Receipt sent by COD
Import	Pell and Direct Loan	CRWB06OP	COD Web-Generated Response (generated by activity on COD Web site)
Import	Pell	CRND06OP	Pell Negative Disbursements (COD system-generated)
Import	Direct Loan	CRBN06OP	Direct Loan Booking Notification (COD system-generated)
Import	Direct Loan	CRCO06OP	Direct Loan Credit Decision Override Response (COD system-generated)
Import	Direct Loan	CRPS06OP	Direct Loan Payment to Servicing (COD system-generated)

2005-2006 COD Message Classes (Continued)

Type	Program Affected	Message Class	Description
Import	Direct Loan	CRPN06OP	Direct Loan Master Promissory Note (MPN) Response (COD system-generated)
Report	Pell	PGRA06OP	Pell Data Request Response
Report	Pell	PGAS06OP	Pell Electronic Statement of Account (ESOA)
Report	Pell	PGMR06OP	Pell Multiple Reporting Record (MRR)
Report	Pell	PGRC06OP	Pell Reconciliation Report
Report	Pell	PGYR06OP	Pell Year-to-Date Record
Report	Pell	PGSN06OP	Pell SSN/Name/Date of Birth Change Report (preformatted)
Report	Pell	PGTX06OP	Pell Text File
Report	Pell	PGPD06OP	Pell Pending Disbursement Report (preformatted)
Report	Pell	PGFD06OP	Pell Funded Disbursement Report (preformatted)
Report	Pell	PGVR06OP	Pell Verification Status Report (preformatted)
Report	Pell	PGPR06OP	Pell Potential Overpayment (POP) Report
Report	Direct Loan	MPNDISOP	New for 2005-2006! MPN Discharge Report (preformatted)*
Report	Direct Loan	MPNINAOP	New for 2005-2006! Expired MPN Report (preformatted)*
Report	Direct Loan	MPNEXPOP	New for 2005-2006! MPNs Due to Expire Report (preformatted)*

***Important Note:** EDEExpress for Windows 2005-2006 will only import the fixed-length preformatted versions of the new COD-generated reports for 2005-2006.

2005-2006 COD Message Classes (Continued)

Type	Program Affected	Message Class	Description
Report	Direct Loan	CODRBFOP	Direct Loan Rebuild File (must be imported into DL Tools software)
Report	Direct Loan	DSDF06OP	School Account Statement (SAS) – Disbursement Detail (must be imported into DL Tools software)
Report	Direct Loan	DSLFF06OP	School Account Statement (SAS) – Loan Detail – Loan Level (must be imported into DL Tools software)
Report	Direct Loan	DIAA06OP	Pending Disbursement List (preformatted)
Report	Direct Loan	DIAO06OP	Funded Disbursement List (preformatted)
Report	Direct Loan	DIWR06OP	30 Day Warning Report (preformatted)
Report	Direct Loan	DECF06OP	Entrance Counseling Results from Servicing Web site
Report	Direct Loan	DLFF06OP	Exit Counseling Results from Servicing Web site
Report	Direct Loan	INACPFOP	Inactive Loan Report
Report	Direct Loan	DUPLPFOP	Duplicate Student Borrower Report
Report	Direct Loan	SNDCPFOP	SSN/Name/Date of Birth Change Report

What's New for FAA Access to CPS Online?

Overview

Changes to the FAA Access to CPS Online Web site for the 2005-2006 cycle are described in the following sections:

- Enrollment for FAA Access to CPS Online
- New Functionality
- Enhancements
 - Personal Identification Number (PIN) Process
 - Application and Correction Entry
 - Verification Tool
 - ISIR Requests
- Changes in other FAA Access Features
- Demonstration Site

Enrollment for FAA Access to CPS Online

To ensure your school can take full advantage of 2005-2006 enhancements at the beginning of the processing cycle:

- The Destination Point Administrator (DPA) of the TG number you use to send and receive FAFSA and ISIR correction data should verify your enrollment status.

If your school is enrolled for 2004-2005 your enrollment status will rollover to 2005-2006.

If your school is not enrolled:

- Complete enrollment for FAA Access to CPS Online site services.
- Your school's DPA can enroll your school through the Student Aid Internet Gateway (SAIG) Enrollment Web site, located at:

fsawebenroll.ed.gov

New Functionality

We implemented the following functionality in the 2005-2006 processing cycle.

- **ISIR Compare Feature.** Using Student Inquiry, you can now compare and view the differences between two ISIR transactions for the same student. You have the capability of sorting by the Differences column, so that all of the values with differences are listed at the top.
- **Standalone FAA Signatures.** From the Application Status Check page, a financial aid administrator (FAA) has access to a standalone FAA signature feature. The standalone FAA signature feature enables the FAA to submit a signature flag when the application is in the Signature Hold status. To get to this option:
 - Access the Student Inquiry section of the Web site.
 - If the initial transaction is not processed, you are automatically directed to Application Status Check. If you are viewing a correction transaction, you are asked if you would like to view the Application Status. The Application Status Check page will be available for 14 days or until the transaction is processed.
 - At the Application Status Check page, if the student or parent signatures are missing from the record and the user's school code is on the application, an Apply Signature button is available.
 - When the button is selected, a page displays for the FAA to provide a signature flag (**A** for applicant, **P** for parent, or **B**, for both the applicant and parent). This page also contains a link to print the signature page and a Submit button to submit the signatures. You can print the signature page to keep for your records under regular record retention rules. The user should have the signed signature page before he or she indicates that the transaction is signed.
 - A successful submission will display a confirmation page.

Enhancements

PIN Process

To enhance the security of the PIN, we made two significant changes to the PIN process effective January 1, 2005. The changes include the implementation of a PIN Terms and Conditions Agreement, and a Challenge Question and Response. These changes affect all PIN users, including FAAs, who receive a PIN before January 1, 2005, and PIN applicants who apply on or after January 1, 2005. The two major changes to the PIN process are:

- **Terms and Conditions Agreement.** The PIN Terms and Conditions Agreement explains to PIN users and applicants the importance of keeping the PIN in a safe place and not sharing the PIN with anyone. PIN users and applicants are required to agree with the terms and conditions before they can continue using their PIN or submit their PIN application.
- **Challenge Question and Response.** To increase the security of the PIN, current PIN users and new PIN applicants are required to select a Challenge Question and give a Response when applying for a PIN. An example of a Challenge Question is “What is your mother’s maiden name?”

Application and Correction Entry

For the 2005-2006 processing cycle, several enhancements were made to Application and Correction Entry through FAA Access to CPS Online:

- **Streamlined Entry Process.** The entry process was streamlined to make entry easier and quicker for you by:
 - Removing the step links between each step on the entry page
 - Pre-filling the demographic fields on the FAA Access FAFSA entry page when an FAA entered data on the Demo tab in EDEExpress and then linked to FAA Access to CPS Online through the FAFSA tab
 - Pre-filling the “Born before?” question based on date of birth
 - Reducing the number of keystrokes for those who use the keyboard to navigate through a record, where accessibility and browser issues could be avoided
 - Placing the cursor in the first field on the entry page

- **Enhanced Correction Entry.** We have updated the correction entry functionality as follows:
 - We added a column to FAA Correction Entry to display the values for the transaction being corrected. You can now view the original value along with the corrected value.
 - A List Changes button has been added at the bottom of the corrections entry page. When this button is selected, a page displays listing the fields for which a value has been entered in the correction value column. This page can be printed for your records.
 - The FAA entry submission flow has changed. We removed the additional “certification text” page. The certification text is now at the bottom of the entry page. Now you can select Submit, a one-step process that submits the application, or you can select Run Final Check. After the final check process is complete, you can submit the application or return to the entry form.
 - We added two reject overrides (for FAA use only) to suppress rejects on initial applications and corrections and enable you to override rejects 3 and 12 (Taxes paid is greater than or equal to AGI). There are rare cases in which taxes paid can be greater than or equal to the AGI. Refer to the *2005-2006 Application Processing System Summary of Changes Process Guide* for a description of the rejects.
- **Numeric Answers in Lists.** All fields on FAA Entry with a selectable list of responses are now prefaced with the numeric equivalent of the response. This enables you to enter a number rather than the first letter of the answer if you use the keyboard rather than the mouse when entering applications and corrections.
- **Canadian Province Codes.** Canadian province codes are now valid values for permanent address state and driver’s license state. When one of the following codes is selected as permanent address state, the permanent address country code is activated so **CN** (Canada) can be selected:

AB = Alberta

NT = Northwest Territories

BC = British Columbia

NU = Nunavut

MB = Manitoba

ON = Ontario

NB = New Brunswick

PE = Prince Edward Island

NF = Newfoundland

PQ or **QC** = Quebec

NL = Newfoundland and Labrador

SK = Saskatchewan

NS = Nova Scotia

YT = Yukon Territory

- **Saved Page Information.** The Save Successful page has been removed; however, float-in text displays at the top of the saved page to indicate that the save was successful. This change was made because some users found it confusing when they were directed to another page after using the Save function.
- **Application Print Report in PDF Format.** We added a PDF version (printer-friendly version) of the “Application Print Report”.
- **Enhanced Federal School Code Lookup.** We have updated the Federal School Code Lookup functionality, as follows:
 - A school can sort a search by School Name, City, Address, or Federal School Code.
 - If a school code is replaced by another school code, we cross-reference the original school code and display a message explaining that the code has been replaced.
 - Schools with other country codes (AS, CN, FM, GU, MH, MP, MX, and PW) can find their school under the listed country code as well as under Foreign Country (FC).
- **Help Search Feature for FAA Access.** We have added a search feature to FAA Access to CPS Online so you can search Help topics and locate your topic more quickly.
- **Updated Read Access Functions.** FAAs that have “Read” access to FAA application and correction entry are now allowed to enter and save records. They are not allowed to submit the record. To submit the saved record, an FAA with “Write” access must open the saved record and complete the application.
- **Idle Message.** If a session has been idle for 25 minutes, a message is displayed indicating the current time (based on the time on the user’s computer) and the time the session will expire. If you click the OK button within the message before the session expires, the session will refresh and be available for another 30 minutes.

Verification Tool

The Verification Worksheet has been renamed the Verification Tool for the 2005-2006 cycle. Additional changes are:

- **Button to Calculate Tolerance.** The automatic calculation of the tolerance when all required fields have been entered has been removed and replaced with a Calculate button. This enables you to wait for all the fields to be entered before you calculate the tolerance. A message and arrows display if fields are missing after the Calculate button is selected.
- **Difference Column.** A difference indicator column has been added to the Verification Tool. Similar to the ISIR compare feature, a Yes or No displays when the Verification Tool field contains a value that differs from the ISIR value. This column appears when the Calculate Tolerance button is selected.

- **Message to Save Verification Report.** A message displays on the view printable page explaining how to save a Verification report on your computer. With the addition of this new feature you are provided with two options for keeping Verification reports, a printed Verification report or a saved Verification report in a file on your computer.
- **Correction Must Be Submitted Message.** Text displays when the tolerance is calculated and a correction must be submitted. You must submit a correction if any of the following are true:
 - Verification Tolerance is \$400 or greater,
 - Income from Work was updated for a tax filer, or
 - Number in Household or Number in College was updated.

ISIR Requests

Enhancements to the ISIR request process are:

- **Multiple ISIR Requests.** Multiple ISIR requests can now be made each day by the same school.
- **Specify Request Title.** To help identify your different ISIR requests, you can specify a title for each. The request title is returned in the first line of the ISIR output file to help you identify the “batches” after they are retrieved from your SAIG mailbox. This will assist you in matching incoming ISIR files to individual requests you submitted to the datamart. For more information on how this change has affected the ISIR record layout, review Section 3 of the *2005-2006 EDE Technical Reference* on the FSAdownload Web site, located at fsadownload.ed.gov.
- **Correction ISIRs Submitted by Your School.** A new ISIR request criterion enables you to request ISIRs resulting from corrections submitted by your schools.

Changes in other FAA Access Features

Starting with the 2005-2006 cycle, the Web site offers the following additional changes:

- **Removed Signature Hold File.** Signature Hold File request functionality has been removed for 2005-2006 due to lack of usage.
- **Renewal PIN Request Replaced with Paper Renewal Application Request.** The PIN Request functionality has been replaced with the Paper Renewal Application Request. This is due to increased Web renewal submissions far exceeding paper renewals. For more information on the changes to the RAD process, refer to the *RAD Process Guide* which is available on IFAP and FSAdownload.

Demonstration Site

The demonstration site, which can be used as a training tool for your financial aid staff, is available for use starting November 28, 2004 at fafsademo.test.ed.gov.

User Name: eddemo

Password: fafsatest

What's New with the ISIR Datamart?

ISIR Datamart Overview

The ISIR Datamart is the centralized location for all ISIR data generated by the CPS. Schools, state agencies, and other authorized users receive ISIR distributions from the datamart through the Student Aid Internet Gateway (SAIG).

You can use FSA's Participation Management System to establish your school's preferences regarding receiving "daily" ISIR files from the ISIR Datamart. For more information visit the SAIG Enrollment Web site at:

fsawebenroll.ed.gov

Daily ISIRs

Schools can receive "daily" ISIRs or request specific ISIR records or groups of records from the ISIR Datamart.

All users, by default, are set up for the daily ISIR distribution preference. This preference can be updated at any time in FSA's Participation Management System. You can also control how and when to receive ISIRs at your school based on the preferences or needs of your institution.

If you select daily receipt of ISIRs, you can also use the datamart as needed to request ISIRs. All ISIR transactions for each student are stored in the datamart and are available for retrieval upon request. The FAA Access to CPS Online Web site enables you to submit requests to the datamart for specific ISIR data based on query criteria.

Requested ISIRs

Requesting ISIRs is a simple process that enables you to receive only the ISIRs you need. You use the ISIR Request feature on the FAA Access to CPS Online Web site to request ISIRs from the datamart. You can submit a query request to the datamart for duplicate ISIRs, year-to-date (YTD) files, or federal data request (FDR) files (for state agencies only). There is no limit to the number of times you can request the same ISIR.

As in past cycles, your school must be listed on the specific ISIR transaction you are requesting for the request to be successfully processed.

As queries are run against the datamart, files of requested ISIRs are generated and sent to you through the SAIG. These files must be retrieved from your SAIG mailbox within 14 calendar days or they will be deleted (and cannot be restored). If this occurs, you can resubmit the same request to the datamart and the data will be generated and sent to you again.

You can view the request date and request status any time after submitting a request. If the request has been processed, you can also view the request completion date and the number of ISIRs that were sent.

Unlimited Queries Each Day. For the 2005-2006 cycle, you are no longer limited to one query request to the ISIR Datamart per day.

Titles can be added to the query requests you submit, and the title you enter will be returned in the ISIR file you receive as a result of your request. This will assist you in matching ISIR files to individual requests you have submitted to the datamart. For more information on how this change has affected the ISIR record layout, review Section 3 of the *2005-2006 EDE Technical Reference* on the FSAdownload Web site, located at fsadownload.ed.gov.

When you return to FAA Access to CPS Online to enter a new request, your most recently completed or pending requests are displayed. Rather than creating a new query, you can save time by using a prior query again to request ISIRs, provided the parameters still apply. You may want to modify the title of the request to distinguish it from other requests you have previously submitted.

For your convenience, queries can be set up to run on a future date. For example, you can set a date in the future to receive all ISIRs processed on or before key deadlines at your school or state agency.

If you want your query to run as soon as possible, simply leave the execute date blank and your query will run after the next CPS compute.

On FAA Access to CPS Online, your identity is authenticated through the PIN Web site and current Participation Management information on file. Your school's Destination Point Administrator (DPA) or members of your staff with "DPA-like" access rights can request ISIRs from the datamart.

ISIR Request Options

A variety of query options are available to facilitate your ISIR requests to the ISIR Datamart, including one new option:

- **New for 2005-2006!** ISIRs created as a result of corrections submitted by your school/destination point
- Date range for Process Date, Receipt Date, or Date Completed
- Dependency Status (Dependent or Independent)
- Eligibility Status (Pell Eligible, Ineligible, or Rejected)
- Expected Family Contribution (EFC) range (00000 to 99999)
- Grade Level (0 to 7)
- School Codes
- SSN/Name Identification (ID)
- State of Legal Residence or state of college
- Transaction Number (first, last, all, specific or greater than X)
- Verification Status (Selected or Not Selected)
- Veteran Status (Veteran Status = Yes or No)
- Combination of these fields

Automatically “Pushed” ISIRs

Certain ISIR transactions are automatically distributed (or “pushed”) to you, regardless of the ISIR delivery option selected in the Participation Management System. This process assists you in meeting requirements for reviewing relevant ISIR data for your students before and after disbursement of financial aid awards.

When your Federal School Code is listed on the following types of transactions, a system-generated ISIR (IGSG06OP) is automatically pushed to your school:

- CPS reprocessing
- Department of Homeland Security (DHS) automated secondary confirmation
- NSLDS Post-Screening

When a correction record processed by the CPS results in one of the following changes on the new transaction, the school that submitted the correction receives the transaction in a daily ISIR file (IGCO06OP), while all other schools listed on the transaction received a pushed ISIR file (IGSA06OP):

- **New for 2005-2006!** Reject Status changes (records that go from a rejected status to having a calculated EFC or from having a calculated EFC to a rejected status)
- **New for 2005-2006!** Verification Status changes (not selected to selected)
- EFC changes
- SAR C Code changes

Pushed ISIR files are sent to state agencies in the IGRE06OP or IGNR06OP message classes (for resident and non-resident transactions, respectively).

ISIRs you receive from daily processing or specific submitted ISIR requests are sent to your SAIG mailbox in the IDAP06OP, IDSA06OP, IDRE06OP, IDNR06OP, or ISRF06OP message classes.

Daily and pushed ISIR data files are stored for retrieval in your SAIG mailbox under current retention and archival guidelines.

Important Notes:

- **Schools Must Obtain ISIRs for All Eligible Students.** Although the flexibilities and options provided to schools through use of the ISIR Datamart are extensive, we want to remind you that you are obligated to obtain ISIRs for all eligible students who enroll at your school.
- **Develop an ISIR Request Process.** We highly recommend that you develop a process for requesting ISIRs from the datamart that takes into account your ongoing student admissions process as well as the tracking and monitoring of existing students with paid-on ISIR transactions.
- **Review ALL Pushed ISIRs.** Your school *must* review all pushed ISIRs and assess any potential impact to your students' aid eligibility, regardless of whether or not you select the "daily" ISIR distribution.
- **Schools Choosing NOT to Receive Daily ISIRs.** Schools that elect not to receive daily ISIRs and instead request specific ISIR transactions from the datamart *must* continue to review ISIR transactions for all enrolled students.

What's New for EDESuite?

Overview

The following sections describe the major 2005-2006 cycle changes in the EDESuite software:

- EDEExpress Release 1.0 — Global functionality and Application Processing and Packaging modules
- EDEExpress Release 2.0 — Pell and Direct Loan modules
- DL Tools
- SSCR

Note: If you are using EDEExpress for Windows (Release 1.0 or Release 2.0) for the first time in the 2005-2006 award year, review the “Enrollment Requirements and Training for New EDEExpress Users” section on the following page.

Enrollment Requirements and Training for New EExpress Users

To exchange data with the Central Processing System (CPS) or the Common Origination and Disbursement (COD) system, users must enroll for these services. If not currently enrolled, you must enroll yourself and your staff for 2005-2006 access rights to the FAA Access to CPS Online Web site and as a Full Participant with COD for the Pell program, the Direct Loan program, or both.

If you were enrolled with COD as a Full Participant in either Pell or Direct Loan for the 2004-2005 award year, your enrollment for that specific program only is automatically rolled over for the 2005-2006 award year. If you were enrolled with COD for both programs in 2004-2005, enrollments for both will be rolled over for 2005-2006.

- To enroll for the FAA Access to CPS Online Web site, visit the SAIG Enrollment Web site located at:

fsawebenroll.ed.gov

- To enroll as a Full Participant with COD, contact COD School Relations at 800/474-7268 (for Pell) or 800/848-0978 (for Direct Loan), through e-mail at CODsupport@acs-inc.com, or visit the COD Web site, located at:

cod.ed.gov

We also encourage new EExpress users to visit FSA's recently redesigned Training for Financial Aid Professionals (T-FAP) Web site. The T-FAP Web site offers a complete list of current and future training activities and learning resources provided by the Federal Student Aid programs, including computer-based training (CBT) courses in EExpress Basics, Electronic Applications, and COD.

For more information, visit the T-FAP Web site, located at:

ed.gov/offices/OSFAP/training

EDEExpress — Release 1.0

This section of the *School Electronic Process Guide* describes enhancements to EDEExpress for Windows 2005-2006, Release 1.0. Release 1.0 contains the Application Processing and Packaging modules, as well as Global functionality, which is applicable across all EDEExpress modules.

Global

The following enhancements have been made to EDEExpress for Windows 2005-2006 Global functionality (applicable to all EDEExpress releases):

Security

- **Password-Protected Database.** The EDEExpress database (expres56.mdb) is now password-protected. You will not be able to open, view, or modify the database in Microsoft Access 2002 without this password. This change will not affect your ability to log into EDEExpress normally. For more information, see the Help topic “Database Password” in the EDEExpress for Windows 2005-2006, Release 1.0 software.
- **Encrypted FAA Information.** For additional security, FAA Social Security Number, Name ID, and Date of Birth data entered in FAA Access setup is encrypted in the EDEExpress database (expres56.mdb).

Prior Year Import

- **Option to Overwrite Data during the Prior Year User Data Import.** You can now elect to overwrite or not overwrite existing user database field data during Prior Year User Data import. We added this functionality to give you the flexibility to import your prior year User Database field data after you have already created student records in EDEExpress for Windows 2005-2006. In past releases, prior year User Database field data was skipped during import if the student record already existed.
- **Prior Year File Format Import.** Prior Year File Format import now imports all fields selected for a file format code in the prior year’s database, provided the fields still exist in EDEExpress for Windows 2005-2006.
- **Prior Year User-Defined Queries.** Prior Year User-Defined Queries import now imports all queries defined in the prior year’s database, provided the fields still exist in EDEExpress for Windows 2005-2006.

Setup

- **Default Address Fields.** We added a new field, Default Address, to Global System setup. This field enables you to define the local or permanent address as the default selection to print on reports displaying student address information. For Release 1.0, this includes the Document Tracking Letter, Award Letter, User-Defined User Letters, and Mailing Labels. For Release 2.0, the Sub/Unsub Disclosure Statement is also affected. This default can be changed on the Print dialog box before printing any of these reports.
- **Automatically Transmit Checkbox.** We added a new checkbox, Automatically Transmit?, to Global Security Users setup. You can fill the EDconnect Transmission Queue and automatically transmit a file at the completion of the export process by selecting this checkbox and the Export to EDconnect? checkbox. You can also continue to leave both checkboxes blank (which leaves the Transmission Queue blank following an export), or select only the Export to EDconnect? checkbox (which fills the Transmission Queue but does not automatically transmit the file).
- **Global File Formats and External Export Functionality.** We added file formats and external exports to the global functionality. This enhancement enables you to add Demo tab fields to a global file format code and run global External Export to create files of student data for use in other systems, similar to functionality already available in the other EDEXpress modules. We have also added a global report, RL-User Defined Formats, which prints the record layout for a specified global file format you have created, which can then be used to interpret global External Export files you create.
- **200 User Database Fields.** A maximum of 200 User Database fields can be defined in EDEXpress for Windows 2005-2006. If you run a Prior Year User Data import, a maximum of 200 fields will be carried forward to your new database from the prior year's EDEXpress database.

View Menu

- **Web Links Added to View Menu.** We added Web links for the Return of Title IV Funds and ISIR Analysis Tool Web sites in the EDEXpress View menu. When either link is selected, the EDEXpress software transfers you directly to the home page of the respective site, provided your PIN authentication is successful.

E-mail Address

- **Two E-mail Address Fields Are Now Available on Demo Tab.** We renamed the existing E-mail Address field on the Demo tab to E-mail Address 1 and added a second e-mail address field labeled E-mail Address 2. This enables schools to more easily accommodate students who may have both temporary and permanent e-mail addresses. The e-mail address included on the imported ISIR is stored in the E-mail Address 1 field. Both fields can be updated through manual entry or by External Add or Change import (for modules that have these import options).
- **Print to E-mail Address 1 or E-mail Address 2.** All EDEExpress letters that can be printed to e-mail (for example, Document Tracking Letter, Award Letter, and User-Defined User Letters) can be printed to either E-mail Address 1 or E-mail Address 2 by selecting the preferred destination on the Print dialog box.
- **Default E-mail Address.** A default e-mail address can be specified in Global System Setup. This setup enables you to define E-mail Address 1 or E-mail Address 2 as the default e-mail address for reports that you choose to print to e-mail. You can manually change the e-mail address that is selected on the Print dialog box.
- **Reports Display E-mail Address 1 and E-mail Address 2.** All reports and lists that previously displayed the single student E-mail Address now display E-mail Address 1 and E-mail Address 2 with the exception of the ISIR report. The ISIR report continues to display the single E-mail Address field and prints the value stored in the E-mail Address 1 field.
- **E-mail Addresses Appear on Student Tabs.** We renamed the E-mail Address field to E-mail Address 1 and added the new E-mail Address 2 field on all student record tabs. The E-mail Address 1 and E-mail Address 2 values are display only fields on all tabs except the Demo tab.
- **E-mail Addresses Available in File Formats Setup.** The renamed E-mail Address 1 field and the new E-mail Address 2 field are available in File Formats setup for all modules except Application Processing, enabling you to include the fields in an External Export file.

Entry

- **Loan Exit Counseling Completed Date.** We added a new modifiable field, Loan Exit Counseling Completed Date, to the Demo tab. In Release 1.0, you can query on this field and manually update the field through Global External Add or Change import and through Global Multiple Entry. In Release 2.0, you can also update this field by importing a Direct Loan External Add or Change file, through Direct Loan Multiple Entry, and by importing the Loan Exit Counseling report (DLFF06OP) file sent by COD.

- **Canadian Province Codes.** We added the following Canadian province codes as valid values for permanent address state, local address state, and driver's license state on the Demo tab. The permanent address country code is enabled and the permanent zip code is filled with zeroes when one of the following province codes is selected as the permanent address state:

AB = Alberta

NT = Northwest Territories

BC = British Columbia

NU = Nunavut

MB = Manitoba

ON = Ontario

NB = New Brunswick

PE = Prince Edward Island

NF = Newfoundland

PQ or **QC** = Quebec

NL = Newfoundland and Labrador

SK = Saskatchewan

NS = Nova Scotia

YT = Yukon Territory

Multiple Entry

- **Multiple Entry Records can be Deselected.** We added a Select column to the update grid (second grid) in Multiple Entry. By clearing the checkbox in this column for a student record, the record is deselected for Multiple Entry update and is not counted in the record count or displayed on the Multiple Entry Edit report. Initially all Select column checkboxes for students displayed on this grid are selected for Multiple Entry update.

Reports

- **Print Global Reports Includes Setup Document Tracking Report.** Users with User IDs other than SYSADMIN who have security access to print Global reports can now print the Setup-Document Tracking report.
- **Exclude SSN Selected when Printing to E-mail Address.** The Exclude SSN? checkbox is now automatically selected and disabled from modification when E-mail is selected as the Report File Destination on the Print dialog box. The Exclude SSN? checkbox is activated when you select a Report File Destination other than E-mail. If the checkbox is activated, you can select or clear the field according to your preference.

- **School Address and Student ID on Printed Letters Moved Closer to the Right Margin.** We moved the school code, school name, school address, and student ID fields on the Document Tracking Letter, Award Letter, and User-Defined User Letter to begin 35 characters before the right margin to better accommodate window envelopes used by schools. When a school name exceeds 35 characters, the school name will be split appropriately between words to allow for printing on two lines.

Application Processing

The following enhancements have been made to the EDEExpress for Windows 2005-2006, Release 1.0 Application Processing module:

ISIR Rvw Tab

- **Student E-mail Address Removed from ISIR Rvw Tab Grid.** The student's e-mail address has been removed from the grid on the ISIR Rvw tab. The ISIR Rvw tab displays the student's E-mail Address 1 and E-mail Address 2 at the bottom of the screen, however, if defined on the Demo tab.
- **Text Descriptions of Numeric Values.** The grid on the ISIR Rvw tab displays the text descriptions of numerical values when text descriptions exist for the values. For example, the student's marital status field now displays "1 – Unmarried" for an unmarried student.

FAA Access Interface

- **Entered FAA Information Appears as Asterisks.** For improved security and consistency with FSA's Web applications, the characters you type for the FAA Social Security Number and FAA Date of Birth in the FAA Access PIN Authentication and Automation Information dialog box appear as asterisks. You will only need to enter this data manually if you have not entered your FAA user information in Global FAA Access setup.

- **EDEExpress Pre-Fills Web FAFSA Questions from Demo Tab Information.** If you log into FAA Access to CPS Online through the FAFSA tab to complete an initial FAFSA for a student, EDEExpress pre-fills the following fields on the Web FAFSA form, provided they are defined on the student's Demo tab:
 - Last Name
 - First Name
 - Middle Initial
 - Permanent Address: Street Address, City, State, Zip Code, and Phone Number
 - E-mail Address (using new E-mail Address 1 field on Demo tab)
 - Original SSN
 - Driver's License # and State
 - Citizenship Status
 - Alien Registration Number
 - Date of Birth

Note: If a renewal application exists, or if you are accessing a correction application, the Demo tab fields will not be passed through so as to not automatically overwrite data that exists at the CPS. If you want to update demographic data on a renewal or correction application, you must do so from within the FAA Access to CPS Online Web site.

- **Message to Accept Terms of Agreement/Provide Challenge Question and Response.** During the PIN authentication process, EDEExpress users who have not accepted the Terms and Conditions Agreement or selected a Challenge Question and Response on the PIN Web site receive a message directing them to the PIN Web site to provide that information before the authentication process can be completed successfully.
- **Restore Records.** You can now restore records through the EDEExpress interface with FAA Access to CPS Online that were initially saved by accessing FAA Access through a browser. In the past, if you started an application through the EDEExpress interface with FAA Access to CPS Online you could not save the application and try to continue without going through the EDEExpress interface. The same issue would occur if you started an application through the FAA Access to CPS Online Web site, saved the application, then tried to access the application by going through the EDEExpress interface. This issue has been resolved and both are interchangeable.

Import

- **Added New Message Class IGSG06OP.** We added a new message class, IGSG06OP, to the ISIR Data Import Type, for 2005-2006 system-generated ISIRs sent by the CPS.
- **Replaced IDCO Message Class with IGCO.** All ISIRs resulting from corrections submitted by schools are now sent under the IGCO06OP message class, including those previously sent under the IDCO message class. The IDCO message class is no longer used by the CPS and is removed as an ISIR Data Import Type for 2005-2006.
- **Deleted Hold File and Message Class.** We removed the Hold File (HOLD) Import Type because the CPS will no longer create and send Signature Hold Files to destination points.
- **Added Import ID.** EDEExpress now adds a date and time stamp identifier to ISIR records when an ISIR file is imported.

Reports

- **Import Edit Report Displays Full Error Message.** Full error message text of up to 45 characters is now displayed on the Import Edit report generated by importing an EAPR06OP, CORE06OP, or SIGA06OP file.
- **Print Active Transaction from ISIR Review Tab.** You can now print the active ISIR transaction to the screen, to a file, or to your printer from the ISIR Review tab.
- **Print Multiple Records Using Import ID.** We added a new Import ID field to the Print dialog box for the ISIR report (multiple print only), the NSLDS report, and the List-Processed ISIRs enabling you to print ISIRs for a given import date and time, similar to previous functionality allowing print output to be filtered by batch number.
- **SAR C Flag Prints Next to the EFC on List-Processed ISIRs Report.** We modified the List-Processed ISIRs report to identify students with a SAR C flag. When an ISIR transaction has a SAR C flag, the report displays a “C” to the right of the student’s EFC (with no space between the EFC and the “C”).

Packaging

The following enhancements have been made to the EDEExpress for Windows 2005-2006, Release 1.0 Packaging module:

Entry

- **Canadian Province Codes.** We added Canadian province codes as valid values for the student’s state of residency and parent’s state of residency fields on the Awards tab.

- **E-mail Addresses Display on Awards Tab and Packaging Record Report.** We renamed the E-mail Address field on the Awards tab to E-mail Address 1 and added the new E-mail Address 2 field. Both fields are display only. The E-mail Address 1 and E-mail Address 2 fields also print on the Packaging Record report.

Import

- **“Are You Male?” ISIR Field Added to Packaging ISIR Import and Query.** The ISIR field “Are You Male?” is now imported during Packaging ISIR Import for query purposes. The field and its value do not display on the Awards tab. You can now include the “Are You Male?” field in Packaging queries you attach to setup profiles, reports, and other Packaging functionality as selection criteria.
- **No Duplicate Student Records Added during an External Add Import.** We updated External Add import logic to add only the first record in an import file for a student to the EDEXpress database and to reject additional instances of the same student in the same file as duplicate records. Records rejected as duplicates are identified on the External Add Import Edit report.

Reports

- **FISAP Report Column Headings Match FISAP Form.** We modified column headings on the FISAP – Eligible Dependent Students and FISAP – Eligible Independent Students reports to match the updated wording on the FISAP form (Section F, “Information on Eligible Aid Applicants for Award Year...”).
- **Updated Missing Documents Information when Printed with Award Letter.** When the Print Missing Documents? option is selected on the Award Letter Print dialog box, EDEXpress now prints “MISSING (M)” or “INCOMPLETE (I)” in the letter text and displays an “M” or “I” next to the document description, as appropriate. This is similar to what prints on the Document Tracking Letter.
- **Print Packaging Record to the Screen.** You can now print the Packaging Record report to the screen from the Awards tab.
- **Print Award Letter to E-mail Address 1 or E-mail Address 2.** When printing an Award Letter and selecting E-mail as the Report File Destination, you can print to E-mail Address 1 or E-mail Address 2 by selecting your preference on the Print dialog box.

EDEExpress – Release 2.0

This section of the School Electronic Process Guide describes enhancements to EDEExpress for Windows 2005-2006, Release 2.0. Release 2.0 contains the Pell and Direct Loan modules. A section for new EDEExpress Release 2.0 users immediately follows this section.

Pell and Direct Loan

We have implemented enhancements to the EDEExpress for Windows 2005-2006, Release 2.0 Pell and Direct Loan modules in the following areas:

COD Setup

- **Warning Message Displays when a Disbursement Profile Code is Created or Updated with Invalid Dates.** We modified Disbursement Profile setup to display a warning if you create or update a Disbursement Profile Code for:
 - Pell and the Module field is “Pell” or “Both Pell and DL” and the Disbursement Date is greater than September 30 of the current award cycle.
 - Direct Loan and the Module field is “Direct Loan” or “Both DL and Pell” and the Disbursement Date is greater than the Approved Loan Period End value, unless the Disbursement Profile Code is created by an import of a Direct Loan Rebuild record.

Prior Year Import

- **New Fields Available for the Pell and DL Prior Year Import.** The following EDEExpress for Windows 2004-2005 fields are now available for Direct Loan and Pell Prior Year Import:
 - Default School? from COD School setup (Pell and Direct Loan)
 - Disable Source Entity ID Setup Warning? and Combine DL and Pell Export? from COD System setup (Pell and Direct Loan)
 - Module and Inactive from COD Disbursement setup (Pell and Direct Loan)
 - Calculate Amounts Using Pennies? from COD School setup (Pell only)

Pell and Direct Loan Data Processing

- **Updated Valid Date Ranges.** We updated valid date ranges for Pell and Direct Loan processing for the 2005-2006 processing cycle to synchronize EDEXpress with COD edits and federal policy. These date ranges include:

Field	Range
Date of Birth	01/01/1906 to 12/31/1997
Pell Enrollment Date	01/01/2005 to 06/30/2006
Pell Payment Period Start Date	01/01/2005 to 06/30/2006
Pell Disbursement Date	06/21/2005 to 09/30/2011
DL Award Begin Date	07/02/2004 to 06/30/2006
DL Award End Date	07/01/2005 to 06/29/2007
DL Academic Year Start Date	07/02/2004 to 06/30/2006
DL Academic Year End Date	07/01/2005 to 06/29/2007
DL Disbursement Date	06/22/2004 to 10/27/2007

Reports

- **New COD Print Dialog Box and Combined Reports.** Two Pell and Direct Loan reports, List-Disbursement Profile Setup and List-Document Activity, have been combined and relocated under a new COD Print dialog box. Options have been added to print Pell only, Direct Loan only, or a combination of Pell and Direct Loan codes or data for both modules.
- **New List-Student Records in Document Report.** We added a new report, List-Student Records in Document, to the new COD Print dialog box. This report lists all student records contained in a specific COD document, including origination, change and disbursement documents for Direct Loan, and origination and disbursement documents for Pell. The report can be sorted by last name or current SSN.
- **Print Origination Records to the Screen From the Origination Tab.** You can now print the Direct Loan or Pell Origination record to the screen from the applicable Origination tab of either module.

Pell Only Processing

Entry

- **Renamed Origination ID.** We updated all references to “Origination ID” in the Pell module to “Award ID.”

Note: This field is used by the EDEXpress database only and is not part of the COD Common Record.

- **Removed Secondary EFC Code.** We removed the Secondary EFC Code field from the Pell Origination tab and all Pell module functionality. This information is no longer collected by COD in the Common Record or returned in the Response output files. Pell awards should always be calculated based on the primary EFC. The secondary EFC continues to be calculated by the CPS on processed 2005-2006 ISIRs and is available for schools to use to determine awards for nonfederal student aid.
- **Modify Disbursement Date and Amount in Same Disbursement Adjustment Transaction.** You can now modify a Pell disbursement date and disbursement amount in the same disbursement adjustment transaction. In prior cycles these changes had to be sent under separate disbursement sequence numbers.
- **Added Disbursement Logic.** We added logic to the Pell Disburse tab to prevent saving a disbursement with the disbursement release indicator (DRI) selected (or True) if the Verification Status code on the corresponding Pell origination record is **W** (without documentation) and one of the following conditions exists:
 - The Pell disbursement 1 (sequence = 1) amount is greater than 50% of the scheduled award on the Pell origination record, or
 - The Pell disbursement 1 (Sequence > 1) adjustment amount is greater than the disbursement 1 (sequence = 1) amount, or
 - The Pell disbursement number is greater than 1.

Reports

- **New Warning Message on the Import Edit Report.** When a COD Web Response (CRWB06OP) is imported, EDEXpress calculates a total disbursement amount for each student record using the student’s total anticipated and actual Pell disbursement amounts in the import file combined with the student's anticipated and actual disbursement amounts currently on the EDEXpress Pell Disburse tab. If this calculated total disbursement amount exceeds the Award Amount for the Entire School Year value on the origination record, a warning message is printed on the Import Edit report.

- **Label Change on Pell YTD Import Edit Report.** The Total YTD Disbursement Amount label on the Pell YTD Import Edit report (YTD Comparison report) has been revised to Total YTD Disbursement Amount (COD). This new label more accurately reflects the source of the value printed.

Direct Loan Only Processing

The following enhancements affect Direct Loan data processing only:

Entry

- **MPN Label Change.** We updated all references to “Promissory Note” and “Prom Note” in the Direct Loan module to read “MPN.”
- **Ellipsis (...) Button to Select ISIR Transactions.** We added an ellipsis (...) button next to the CPS Transaction # field on the Direct Loan Origination tab, enabling you to select from a grid of non-rejected (EFC calculated) ISIR transactions.
- **CPS Transaction Number Carried Forward to New Loans.** On the Direct Loan Origination tab, if you select “Yes” in response to the Create Unsubsidized Loan? prompt (from a subsidized loan record) or the Create Subsidized Loan? prompt (from an unsubsidized loan record), EDEExpress now automatically carries over the CPS Transaction # value from the existing loan record to the new loan record you create.
- **Canadian Province Codes.** We added Canadian province codes as valid values for the Permanent Address State and Driver’s License State fields on the PLUS Info tab on the Direct Loan Origination tab. The Permanent Address Country Code is enabled and the Permanent Zip Code is automatically filled with zeroes when a Canadian province code is selected as Permanent Address State.
- **Change Dates on PLUS Info Tab Only Updated if Associated Fields Are Modified.** The Permanent Address, Date of Birth, and Social Security # fields in the Change Dates section of the PLUS Info tab on the Direct Loan Origination tab are now updated with your PC system date only when the corresponding fields in the Parent Information section are modified. The change date fields remains blank when you initially enter and save data in the corresponding fields in the Parent Information section.

- **EDEXpress Displays Endorser Amount.** If COD returns an endorser amount in a Direct Loan Credit Decision Override Response file (CRCO06OP), EDEXpress displays the amount in a new Endorser Amount field on the Credit Info tab on the Direct Loan Origination tab, as well as on the Direct Loan Disburse tab of the PLUS loan. We also added the endorser amount to the Origination Record report for PLUS loans, List-Loans report, Direct Loan File Format setup, Direct Loan Query, and Direct Loan Browse PLUS grid. The Endorser Amount field is not modifiable.
- **PLUS Loan Amount can be Adjusted When Credit Decision Status is E.** When a Credit Decision status is **E** (credit overridden; endorser OK) on the Credit Info tab of the Direct Loan Origination tab of a PLUS loan, the Loan Amount Approved can now be adjusted up or down. However, the loan amount approved cannot exceed the endorser amount received from COD.
- **EDEXpress Compares Disbursement Gross Amount to Endorser Amount and Loan Amount Approved.** When a PLUS loan actual disbursement (DRI = selected or True) is saved, EDEXpress now compares the gross amount of the disbursement to the new Endorser Amount field (if it exists on the corresponding origination record) and the Loan Amount Approved field. If the disbursement's gross amount exceeds the lesser of the two fields, EDEXpress displays the message "The actual gross disbursement total cannot exceed the loan amount approved or endorser amount" and does not save the disbursement.
- **Changes to DL Disbursement Type Q.** When a Direct Loan disbursement type **Q** (adjusted disbursement date) is entered:
 - EDEXpress carries forward the gross, fee, rebate, and net amount fields from the previous disbursement sequence number to the new transaction. These amounts cannot be modified on the disbursement type Q transaction.
 - EDEXpress prevents you from saving the record with a blank disbursement date.
 - EDEXpress displays a warning message if the date entered is the same as the previous disbursement sequence number for the disbursement number being modified.

Multiple Entry

- **Cannot Adjust an Actual Disbursement Amount to Blank Using Multiple Entry.** Direct Loan Multiple Entry no longer enables you to adjust an actual disbursement amount to blank and save the record with the change. If you want to adjust a disbursement amount to \$0 in Direct Loan Multiple Entry you must enter 0 for the disbursement amount, similar to manual entry on the Disburse tab.

- **Loan Amount Approved Reduced to \$0 When a Loan is Inactivated in Multiple Entry.** When a Direct Loan record is inactivated using Multiple Entry, the loan amount approved is now automatically reduced to \$0, all anticipated disbursement data is automatically reduced to \$0, and the changed data is automatically marked for export to COD in the next Common Record export.
- **Current Student Record Values Display on the DL Multiple Entry Grid.** As with College Grade Level and Loan Entrance Interview Date, the following additional fields will display the value that is currently associated with the student record in the EDEExpress database:
 - MPN Status
 - Date Signed
 - (Anticipated) Disbursement Amount
 - (Anticipated) Disbursement Date
 - Disclosure Printed

Import

- **Import Type List Re-ordered.** To improve consistency between the Direct Loan and Pell modules, the Direct Loan Import Type COD Common Record Response/Receipt is now listed as the first choice on the list.
- **Loans Only Created when ISIR has Calculated EFC.** A subsidized or unsubsidized loan is now only created during Loan Data-ISIR import if the ISIR transaction has a calculated EFC.

Query

- **Manifest Document ID Query Name Change.** We renamed the Direct Loan predefined query Promissory Note Document ID to Manifest Document ID.
- **Added ISIR DL PLUS MPN FLAG field.** We added a new query and file format field, ISIR DL PLUS MPN FLAG, to Direct Loan Query and Direct Loan File Format setup. The query field allows you to select specific groups of students based on the value of the DL PLUS MPN Flag from the ISIR. The file format field allows you to export the value of the DL PLUS MPN Flag from the ISIR to a Direct Loan External Loan Data file.
- **Renamed ISIR DL MPN Flag.** We renamed the Direct Loan Query and File Format field ISIR DL MPN Flag to ISIR DL Sub/Unsub MPN Flag.

Reports

- **Three New Fixed-Length COD-Generated DL Reports.** COD is generating three new fixed-length Direct Loan reports for 2005-2006. All three reports are available for importing and viewing in EDEExpress. These reports do not update the EDEExpress database:
 - **MPN Discharge Report:** Notifies schools of MPNs that have become inactive within the last 30 days due to discharges for death and unauthorized signature
 - **Expired MPN Report:** Notifies schools of inactive MPNs within the last 30 days due to normal disbursement inactivity.
 - **MPNs Due to Expire Report:** Notifies schools of MPNs that are about to expire or become inactive within a specific number of days.
- **DL Origination Record Prints the Action Date.** The Action Date field from the Direct Loan Disburse tab now prints on the Direct Loan Origination Record report in the Actual Disbursement section.
- **Print Logic Updated.** When the Country Code field on the Demo tab or the PLUS Info tab on the Direct Loan Origination tab has a value entered and the value in the Permanent Address State field is **FC** (foreign country), all Direct Loan reports that print student address information now display the Country Code field and value in place of the Permanent State field and value. This change affects the print logic for the Sub/Unsub MPN, PLUS MPN, Disclosure Statement – Sub/Unsub, Disclosure Statement – PLUS, Direct Loan Origination Record report, and Parent Borrower Mailing Labels.
- **Updated List-Anticipated Disbursements Report.** We updated the List-Anticipated Disbursements report to display:
 - Total disbursement record counts for each loan type (subsidized, unsubsidized, and PLUS), and a total combined disbursement record count for all loan types.
 - Total booked and total unbooked disbursement records for each loan type (subsidized, unsubsidized, and PLUS), and a total combined disbursement record count (booked and unbooked combined) for each loan type.

New EDEExpress Release 2.0 Users

Beginning in 2005-2006, all schools submitting Pell or Direct Loan data to COD must be enrolled as Full Participants. All 2005-2006 Pell and Direct Loan data must be sent to COD in the COD Common Record's Extensible Markup Language (XML) format.

Users of EDEExpress for Windows 2005-2006, Release 2.0 Pell and Direct Loan must be enrolled as COD Full Participants, as in past cycles. You only need to enroll as a Full Participant for Direct Loan or Pell if you were considered a Phase-In participant for the respective program in 2004-2005. If you are a new EDEExpress user, see the “Enrollment Requirements and Training for New EDEExpress Users” topic in the EDEExpress – Release 1.0 section earlier in this guide.

- If your school used EDEExpress in 2004-2005 for both the Pell and Direct Loan program and registered with COD at that time to be a Full Participant, you do **not** need to contact COD School Relations and register again for 2005-2006.

The EDEExpress software exports Common Record Pell and Direct Loan files in XML format. Response files received from COD are also in XML format and can be imported into EDEExpress to view processed results.

Schools that used non-XML third-party or mainframe systems to communicate with COD in past cycles can use EDEExpress for Windows 2005-2006, Release 2.0 as an XML “translator.”

In this scenario a school would:

1. Use record layouts provided in the *2005-2006 COD Technical Reference, Volume III* to create an External Import Add file of origination and disbursement data for Pell or Direct Loan from your third-party or mainframe system.
2. Import the External Import Add file into EDEExpress to create student records.
3. Export the student data records (in XML format) from EDEExpress.
4. Transmit the data from your Student Aid Internet Gateway (SAIG) mailbox to the COD mailbox using the SAIG.

After the data is processed by COD and returned to the school’s SAIG mailbox the school would:

1. Download the COD Response file from SAIG and import it into EDEExpress to update the student records.
2. Create a Pell or Direct Loan File Format in EDEExpress to select origination and disbursement fields you want to export from EDEExpress and load back into your third-party or mainframe system.
3. Perform an External Export from EDEExpress to create data files in flat file (non-XML) format.
4. Load the flat file from the EDEExpress External Export into your third-party or mainframe system.

DL Tools

DL Tools is a multi-year Windows-based application designed to provide the following functionality related to all Direct Loan schools' software:

- Rebuild your Direct Loan origination and disbursement records in EDEXpress using an automated process
- Compare the School Account Statement (SAS) report loan and disbursement data to loans and actual disbursements recorded in EDEXpress or an external file, and/or compare the SAS report cash data to the DL Tools Cash database
- Print the SAS report in a readable format
- Track cash receipts (drawdowns), returns of excess cash, and refunds of cash for the Direct Loan program

DL Tools processes data for multiple cycles. Release 5.0, available in July 2005, contains Rebuild, Cash Management, and Compare functionalities for the 2003-2004, 2004-2005, and 2005-2006 cycles.

All Direct Loan schools can use the compare and Cash Management functionalities. The Rebuild process is for schools to rebuild an EDEXpress database in the Direct Loan module. Non-EDEXpress users can export data from a rebuilt EDEXpress database to recreate other needed non-EDEXpress loans or databases.

Listed below are the planned enhancements to DL Tools for Windows, Release 5.0:

General

- **2002-2003 Functionality Removed.** We are removing all DL Tools functionality applicable to program year 2002-2003. This includes the elimination of all COD Phase-In Participant Rebuild fields.
- **Promissory Note References Updated.** We are updating all instances of "Promissory Note" to "MPN".

Security

- **Password-Protected Database.** The DL Tools database (DLT.mdb) is now password-protected. You will not be able to open, view, or modify the database in Microsoft Access 2002 without this password. This change will not affect your ability to log into DL Tools normally. For more information, see the Help topic "Database Password" in the DL Tools Release 5.0 software.

Browse

- **Browse Program Year Column Updated.** When you upgrade from DL Tools Release 4.0 to Release 5.0, the Program Year column on the Cash Detail and Loan Detail Browse dialog boxes is updated to consistently display cycles as “Y1Y2”. For example, the program year 2005-2006 will appear as “0506”.
- **Browse Cash Detail Grid Labels Updated.** On the Cash Detail Browse grid, we are making the following label changes for all program years:

Release 4.0 Label	Release 5.0 Label
GAPS/Applied Date/Transaction Date	Transaction Date
Action Type/Record Type/Transaction Type	Transaction Type
As-Of-Date/End Date	End Date of Current Statement Period
COD Posting Date/COD Run Date	COD Process Date

Import

- **Import Type List Reordered.** The School Account Statement (SAS) is now listed as the first choice on the list in response to feedback indicating that it is the most frequently used import type.
- **Endorser Amount Added to Rebuild.** The Endorser Amount field sent by COD is rebuilt on 2005-2006 EDExpress PLUS loan records when using the rebuild feature.

Reports

- **Cash Report Renamed.** We are renaming the Cash Report of prior DL Tools versions to be the Internal Ending Cash Balance report.

For record layouts, report mock-ups, and other additional details on using DL Tools Release 5.0, see the *2005-2006 COD Technical Reference, Volume IV (DL Tools)*, scheduled for release in July 2005 on fsadownload.ed.gov.

SSCR

SSCR (Student Status Confirmation Report) for Windows is a multi-year application designed to help you electronically certify borrowers' enrollment and update student information on the National Student Loan Database System (NSLDS).

NSLDS regularly sends you an SSCR roster containing the students enrolled at your school for which NSLDS has loan records. SSCR for Windows can be used to import, update, and export student records in the SSCR roster to return to NSLDS.

The SSCR roster can be sent to you by NSLDS as often as once a week or as seldom as twice a year. Most schools choose to receive SSCR rosters every two months. You can change your preferences on the U.S. Department of Education's NSLDS Web site, located at nsls.ed.gov.

In July 2004, we posted SSCR for Windows Release 2.0 and related documentation to the FSAdownload Web site, located at fsadownload.ed.gov.

Release 2.0 is intended to replace previous versions of the SSCR software. If you are currently updating an SSCR roster in the last official SSCR release, Version 1.2, you should complete your updates to the SSCR roster (including resolving any error records you may have received) in Version 1.2 and begin using Release 2.0 for the next SSCR roster you receive.

Release 2.0 offers the following enhancements:

General

- **Microsoft Access 2002 Database.** Beginning with Release 2.0, the SSCR database is Microsoft Access 2002 format.

Security

- **Ellipsis (...) Button for User ID Field.** We added an ellipsis (...) button next to the User ID field on the SSCR Login dialog box, which enables you to view and select a user ID from a list of all established user IDs in Security Users setup. The SYSADMIN user ID is not displayed as a choice on the list.
- **User Password Expiration.** For enhanced security, SSCR users' passwords now expire every 30 days. When you log into SSCR with a password older than 30 days, an alert indicates "You must enter a new password." After you click OK to the alert, you are transferred to the New Password field on the Login dialog box, where you must enter a new password. Type the password again in the Verify Password field. You cannot use your current password for your new password. After you have entered a new password and verified it, you can log into SSCR as usual.

Entry

- **Error Message Displays when Date Enrollment Status is Left Blank when Enrollment Status Equals W.** When saving an SSCR record with a code for Enrollment Status of **W** (withdrawn), an error message displays if the Date Enrollment Status Effective field is left blank.
- **Date Enrollment Status Effective Can Be Blank when Enrollment Status Equals X or Z.** When updating an SSCR record with a code for Enrollment Status of **X** (never attended) or **Z** (record not found), the Date Enrollment Status Effective field can now be left blank.

File Management

- **Updated Message Classes.** SSCR’s File Management functionality has been updated to display import and export message classes with “XX” as part of the file name instead of “99”. The updated message classes, which have already been implemented by NSLDS, are:

Message Class	Data Description
SSCRXXOP	SSCR Roster
SSCEXXOP	SSCR Error File
SSCRXXIN	SSCR Roster Return
SSCMXXIN	SSCR Error File Return / Ad Hoc File

Export

- **Batch ID Field on the Export Dialog Box Can Be Sorted.** The Batch Control grid, displayed when you click the ellipsis (...) button next to the Batch ID field on the Export dialog box, has been updated to allow sorting of the data displayed in ascending or descending order.

Reports

- **Date of Birth Prints on the List—SSCR Report.** The student’s date of birth is added to the List—SSCR report.

For more information on SSCR for Windows, Release 2.0, see the cover letter, installation guide, and desk reference available on the FSAdownload Web site, located at fsadownload.ed.gov.

Return of Title IV Funds (R2T4) on the Web

Return of Title IV Funds (R2T4) on the Web

Return of Title IV Funds is a non-year-specific application developed to calculate the earned and unearned portion of Title IV program assistance in accordance with section 484B of the Higher Education Act of 1965, as amended, and the final regulations published November 1, 1999 (64 FR 59016).

R2T4 on the Web was designed for an easy transition by schools from the existing PC software to the Web platform. You can use either the Web or the PC application.

The most recent R2T4 PC software release, Version 1.1.2, is available on the FSAdownload Web site, located at fsadownload.ed.gov.

R2T4 on the Web is accessible through the FAA Main Menu of the FAA Access to CPS Online Web site (fafsa.ed.gov/faa/faa.htm) and from the View menu in EDEExpress for Windows 2005-2006.

The following functionality is available on the R2T4 Web site:

- **The Home Page.** R2T4 on the Web's home page is designed to provide you with a quick overview of the site's functionality and capabilities. "Help links" provide additional detailed information on return issues.
- **Navigation.** The left navigation bar links enable you to move quickly and intuitively through R2T4 on the Web. Links listed are: Institutional Charges, School Calendar, Student Record Status, Create New Record, Find Existing Record, User-Specified Fields, Reports, and Data Export.

- **Institutional Charges.** As in the PC version, R2T4 on the Web requires that you first establish Institutional Charges and School Calendar Profile codes before creating student records. Institutional Charges codes are created to track various combinations of tuition and fees, room, board, and other fees by academic program. We recommend that you enter charges that apply to the majority of your students. If necessary, you can modify the charges within an individual student's record.
- **School Calendar.** Define your school's calendar by academic program using the School Calendar Profile (SCP) setup page. SCP is used to calculate the number of days or hours in a program's payment period or period of enrollment. An Institutional Charges code must be associated with each SCP.
- **Student Record Status.** The Notification Tracking Status page of R2T4 on the Web is designed to give users a method to track student records at various stages in the R2T4 process and enables you to quickly view, monitor, and update those records. Tracking pages available include:
 - **Student Notification.** This status page tracks the date you notify each student of a Title IV grant overpayment or the number of days you have left to notify the student.
 - **Student Repayment Arrangements – Not Completed** and **Student Repayment Arrangements – Completed.** These two status pages track whether the student has made arrangements to repay funds, the type of repayment arrangement and the date the repayment arrangement is made, or the number of days the student has left to respond to your notification that he or she must take positive action to resolve the Title IV grant overpayment.
 - **School Portion of Title IV Funds To Be Returned** and **School Portion of Title IV Funds Returned.** These two status pages track whether the school has returned its portion of the unearned funds, the date, or the number of days the school has left to return the funds it is responsible to repay.
 - **Students with a Post-Withdrawal Disbursement.** This status page tracks the number of days the school has to notify the student, when the school has received a response from the student, and the date a post-withdrawal disbursement is completed.
 - **Student Records Referred to the Department of Education.** This status page tracks the students referred to the Department of Education (ED) and the date the school referred them to ED.
- **Create New Record.** New student records are easily created by entering the student's Social Security Number (SSN) and then providing the student's name, address, and other information on the demographic page.
- **Find Existing Record.** A link on the left navigation bar enables you to locate existing student records easily. You can search for records by SSN or last name.

- **User-Specified Fields.** Five predefined fields (GPA, Major, Repayment Status, Withdrawal Reason, and Leave of Absence Reason) commonly used by schools are provided by default on the Web site. In addition, you can create up to 10 user-specified fields to gather and track student data specific to your school. The 10 additional user-specified fields can be formatted to collect data in numeric, string (text), date, or Boolean (yes/no) format.
- **Reports.** Six reports are available in R2T4 on the Web:
 - **Student Listing.** This report lists all the student records in your database by withdrawal date, withdrawal reason, last name, and Social Security Number.
 - **Student Notification.** This report shows the students who owe a grant (Pell, FSEOG, and other Title IV grants) overpayment of \$25 or greater or owe a loan amount greater than \$0. Students appear on this report regardless of their Repayment Arrangement Type.
 - **Student Repayment Arrangements.** Students who have or have not arranged to repay their overpayment amounts appear on this report.
 - **School Portion of R2T4 Returned.** This report lists students who have an amount in the Unearned Title IV aid due from the school that is greater than zero and for whom you have either returned or not returned the school portion of the Return of Title IV funds.
 - **Students with a Post-Withdrawal Disbursement.** This report is a list of the student records in your database with post-withdrawal disbursements at a complete or an incomplete status.
 - **Student Records Referred to the Department of Education.** A student appears on this report if his or her Repayment Arrangement Type is one of the following:
 - **3** (Make satisfactory repayment arrangements with ED)
 - **4** (No satisfactory arrangement made)
 - **5** (Made arrangements, but did not comply with arrangements)
 - Blank and more than 45 days have elapsed since the school notified the student that a Return of Title IV funds is required
- **Data Export.** The Data Export feature enables you to download your R2T4 on the Web student data by using a comma-delimited text file or by displaying data on a viewable Web page using the Browse Data option.

- **Student Record Tabs.** Each student record contains six tabs which organize, calculate, and store data:
 - **Overview Tab.** Provides high-level information on the R2T4 records you have created for a particular student, including the last date you modified a particular section of the record. You can print a summary report of the student's R2T4 records from this tab.
 - **Demographic Tab.** Documents the student's name, DOB, address, phone numbers, and other general student information.
 - **R2T4 Tab.** Calculates the student and school repayment obligations automatically using established federal rules and regulations. You can print the R2T4 Worksheet in Adobe Acrobat format from this tab.
 - **Post-Withdrawal Disbursement Worksheet Tab.** Enables you to view, track, calculate, update, and print post-withdrawal disbursement amounts.
 - **Notes Tab.** Enables you to document other information about the student's withdrawal.
 - **User Data Tab.** Enables you to enter data in user-specified fields you have created, or in the five predefined fields (GPA, Major, Repayment Status, Withdrawal Reason, and Leave of Absence Reason) provided by default on the Web site.
- **Help and FSA Links:** All pages display a link to the R2T4 on the Web Welcome page, R2T4 on the Web Online Help and Frequently Asked Questions, and the FSA Schools Portal (fsa4schools.ed.gov).

Your staff members need to be enrolled for both FAA Access to CPS Online and Return of Title IV Funds specifically to access the R2T4 on the Web site. The destination point administrator (DPA) of the TG number currently used by your school to send and receive FAFSAs and ISIR corrections has access to the FAA Access to CPS Online Web by default and can add or modify rights. This DPA (and *only* this DPA) will need to enroll financial aid staff members for access to FAA Access to CPS Online and the R2T4 on the Web sites.

You can easily sign up financial aid staff members for FAA Access to CPS Online and R2T4 on the Web on the SAIG Enrollment Web site, located at:

fsawebenroll.ed.gov

Signature pages are *not* required for FAA Access to CPS Online or R2T4 on the Web enrollment.

ISIR Analysis Tool

ISIR Analysis Tool

The ISIR Analysis Tool Web application is designed for any school that wants to review and analyze its ISIR data and better understand certain characteristics about its Title IV applicant population and verification process (either selected by the Department of Education or defined by the school).

The ISIR Analysis Tool is accessible through the FAA Main Menu of the FAA Access to CPS Online Web site (fafsa.ed.gov/faa/faa.htm).

You can use the ISIR Analysis Tool to:

- Request specific initial and paid-on ISIR transactions using a basic text flat file. The requested ISIR transactions are loaded from the ISIR Datamart into your ISIR Analysis Tool database. The initial and paid-on ISIR transaction requests can be submitted at the same time or individually.
- Request that the ISIR Analysis Tool application select a random sample of students from a flat ASCII file (including the Social Security Numbers) provided by your school. After the sample is selected, the ISIR Analysis Tool will load the students' ISIR transactions from the ISIR Datamart into the ISIR Analysis Tool database to be used for analysis. The initial and paid-on ISIR transactions can be loaded at the same time using built-in business logic (for example, lowest transaction as of a "processed date"). In addition, the school can request that ISIR Analysis Tool load both initial and paid-on transactions from the sample or request them individually.
- Define and complete user-specified fields to track data specific to your school.
- Set the School Verification Flag to indicate students meeting your school's institutional verification criteria.

- Run the Data Validation process to identify student records missing both an initial and paid-on ISIR transaction and perform other calculations to finalize your overall ISIR sample before generating reports.
- Generate standard reports that are used for in-depth analysis based on discrepancies or trends identified in requested ISIR data.
- Create ad hoc reports that can be used to conduct additional analysis unique to your school's user data and student demographics.

The 2005-2006 version of the ISIR Analysis Tool will be available in June 2005.

Important Note: Using the ISIR Analysis Tool does not necessarily mean that your school is in the Quality Assurance (QA) Program or is exempt from federal verification requirements. To have these benefits, you must have a signed QA Amendment to your Title IV Program Participation Agreement (PPA).

Your staff members will need to be enrolled for both FAA Access to CPS Online and the ISIR Analysis Tool specifically to access the ISIR Analysis Tool Web site. The destination point administrator (DPA) of the TG number currently used by your school to send and receive FAFSAs and ISIR corrections has access to the FAA Access to CPS Online Web by default and can add or modify rights. This DPA, and *only* this DPA, will need to enroll financial aid staff members for access to the FAA Access to CPS Online and the ISIR Analysis Tool Web sites.

You can easily sign up financial aid staff members for FAA Access to CPS Online and the ISIR Analysis Tool on the SAIG Enrollment Web site, located at:

fsawebenroll.ed.gov

Signature pages are *not* required for FAA Access to CPS Online or ISIR Analysis Tool enrollment.

Software and Hardware Requirements

Federal Register Notice – September 2004

The Student Assistance General Provisions regulations in 34 CFR 668.16(o) provide, in part, that to be administratively capable an institution must participate in electronic processes designated by the Secretary. These processes were first identified in a notice published in the *Federal Register* on September 19, 1997. In that Notice, we also provided information regarding the hardware and software requirements needed for an institution to participate in the designated electronic processes.

Because of advances in technology we updated those hardware and software requirements in the *Federal Register* Notice published on December 22, 2000, and, most recently, in the *Federal Register* Notice published in September 2004.

The September 2004 notice updates the designated electronic processes that institutions must participate in and the software and hardware requirements (presented as a minimum system configuration and an optimal system configuration) that institutions should meet to participate in these processes.

A new process included in the September Notice is that beginning with the 2005-2006 award year all institutions must send and receive origination and disbursement data for the Federal Pell Grant Program and the Federal Direct Loan Program using the Common Origination and Disbursement (COD) system's Common Record format. There will no longer be a Phase-In level of COD enrollment for submitting and receiving information using flat-file formats.

Other designated electronic processes and new minimal and optimal hardware and software requirements can be found in the September Notice, available on the IFAP Web site at:

ifap.ed.gov/fregisters/FR09142004

Getting Help

CPS/SAIG Technical Support

If you have any questions regarding this guide or the 2005-2006 EDESuite software products in general, contact CPS/SAIG Technical Support for assistance by calling 800/330-5947 or sending an e-mail to CPSSAIG@ed.gov. TDD/TTY services are also available at 800/511-5806.

Representatives are available Monday-Friday, 7 a.m. to 7 p.m. (CT).

CPS/SAIG Technical Support can assist you with the following:

Software and Web Assistance

- EDEExpress – Application Processing, Packaging, Direct Loan, and Pell
- EDconnect
- DL Tools
- SSCR
- FAA Access to CPS Online
- Return of Title IV Funds (R2T4)
- ISIR Analysis Tool

Technical References

- *COD Technical Reference Vol. III* (Direct Loan & Pell Grant Combination System Supplement)
- *COD Technical Reference Vol. IV* (Direct Loan Tools)
- *EDE Technical Reference*
- *Packaging Technical Reference*

Additional Customer Services

- CPS Testing System
- Custom/Combo/Mainframe Support for Direct Loans
- EDE Enrollment and Participation
- Electronic Access Conference (EAC) Information
- FAA Access to CPS Online Web site
- *The ISIR Guide*
- Rejected EDE Records
- *Renewal Application Data (RAD) Process Guide*
- Restore Files to Customers' Mailboxes
- SAIG Network Password Changes and Resets
- SAIG Transmission Errors
- *SAR/ISIR Comment Codes and Text*

You can also post questions regarding this guide on our e-mail listserv, FSATECH. FSATECH is an e-mail listserv for technical questions about the U.S. Department of Education's FSA systems, software, and mainframe products. For more information about FSATECH, including how to subscribe, visit the Listservs & Mailing Lists link on the FSA Schools Portal at:

ed.gov/offices/FSA/services/fsatechsubscribe.html

The IFAP Web Site

Visit our Information for Financial Aid Professionals (IFAP) Web site at ifap.ed.gov. IFAP contains the latest information on federal financial aid, including Dear Partner/Colleague Letters, electronic announcements, training information, U.S. Department of Education (ED) publications, technical publications, and other documents.

Customer Service

Sources of Assistance for Schools

This guide contains all communication references previously found in the technical references and desk references published by the U.S. Department of Education (ED). These references include phone numbers, e-mail addresses, Web site addresses, etc., and often have brief explanations of the entity's purpose, which are primarily found as bullets. To view and print a copy of this document, visit:

fsadownload.ed.gov/sastechref.htm

COD School Relations Center

The COD School Relations Center integrates customer service for the Direct Loan and Pell Grant Programs for all award years.

All schools and Direct Loan PLUS borrowers should call the numbers listed below for assistance:

- Pell Grant: 1-800-474-7268
- Direct Loan School Services: 1-800-848-0978
- Direct Loan Applicant Services: 1-800-557-7394

The COD School Relations Center telephone system prompts the school to enter the award year about which the school is calling, and the call is routed to the proper COD Customer Service Center staff.

E-mail: CODsupport@acs-inc.com

Federal Student Aid Information Center

800/4-FED-AID (800/433-3243); TDD/TTY: 800/730-8913

Representatives are available Monday-Sunday, 8 a.m. to midnight (ET).

FSA Customer Service Call Center (CSCC)

800/433-7327

For Title IV program questions, application processing questions, and for assistance contacting other ED staff.

Representatives are available Monday through Friday, 9 a.m. to 5 p.m. (ET).

E-mail: FSA.Customer.Support@ed.gov

FSATECH Listserv

This listserv is used to address technical questions and issues about FSA's systems and software. For more information, visit:

ed.gov/offices/FSA/services/fsatechsubscribe.html

Documents

The following documents detail the changes to the Application Processing System for the 2005-2006 processing cycle. The documents are located on the U.S. Department of Education's Federal Student Aid download Web site, located at fsadownload.ed.gov, and on the Information for Financial at Professionals (IFAP) Web site, located at ifap.ed.gov.

- *RAD Process Guide*, describing changes to the Renewal Application Process, August 2004
- *2005-2006 Electronic Data Exchange (EDE) Technical Reference*, available November 2004
- *The ISIR Guide*, available November 2004
- *Application Processing System Summary of Changes Process Guide*, available November 2004
- *Student Web Application Products Process Guide*, available November 2004

Schools using EDEExpress for Windows 2005-2006 can consult the *EDEExpress for Windows 2005-2006 Release 1.0 Desk Reference*, which provides guidance for Application Processing, Packaging, and Global functionality, and the *EDEExpress for Windows 2005-2006 Release 2.0 Desk Reference*, which covers Pell and Direct Loan functionality. Both documents are posted to the FSAdownload Web site at the same time as their applicable EDEExpress releases.

For record layouts and other additional information on the SSCR process, see the *NSLDS Enrollment Reporting Guide*. To find this document on the IFAP Web site, click the "NSLDS Reference Materials" link on the main page under "On-Line References," then click "NSLDS User Documentation" on the following page.

Web Sites

You can find more information about EDESuite and other student financial aid tools and documents on the following Web sites:

- FSA Schools Portal: fsa4schools.ed.gov
- IFAP: ifap.ed.gov
- FSATECH Listserv: ed.gov/offices/FSA/services/fsatechsubscribe.html
- FSAdownload: fsadownload.ed.gov
- Training for Financial Aid Professionals (T-FAP): ed.gov/offices/OSFAP/training
- SAIG Enrollment: fsawebenroll.ed.gov
- FAA Access to CPS Online: fafsa.ed.gov/faa/faa.htm
- Common Origination and Disbursement (COD): cod.ed.gov
- Demonstration Web site: fafsademo.test.ed.gov