
School Electronic Process Guide

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

2006-2007

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 2006-2007 processing cycle:

- Schedules
- Message Classes
- What's New for FAA Access to CPS Online
- What's New for EDESuite for Windows 2006-2007 PC Software
 - EDEExpress for Windows, Release 1.0 – Global functionality and Application Processing (App Express) and Packaging modules
 - EDEExpress for Windows, Release 2.0 – Pell and Direct Loan modules
 - Direct Loan (DL) Tools for Windows, Release 6.0
 - Student Status Confirmation Report (SSCR) for Windows, Release 3.0
- Return of Title IV Funds (R2T4) on the Web
- ISIR Analysis Tool
- 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 2006-2007 processing cycle:

- **Annual Changes.** EDESuite 2006-2007 software products conform to annual changes to the Free Application for Federal Student Aid (FAFSA), Institutional Student Information Record (ISIR), Personal Identification Number (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.
- **508 Compliance in EDESuite Products.** All EDESuite 2006-2007 PC products contain updates to software grids, field labels, and help text to ensure compatibility with screen reader technology used by the visually impaired, in compliance with Section 508 of the Rehabilitation Act. Software administrators can enable or disable “floating” text descriptions appearing in software grids for individual users.
- **Elimination of Paper Renewal FAFSAs.** We are discontinuing the paper Renewal FAFSA form due to decreasing use in 2005-2006 and previous cycles. All students must use Renewal FAFSA on the Web to submit a renewal application for the 2006-2007 cycle and forward.
- **FAA Access Renewal Entry for Pacific Islander Students.** FAAs can access and enter Renewal FAFSA applications for Pacific Islander students using FAA Access to CPS Online if the students meet the renewal application eligibility requirements. FAAs will submit the 2006-2007 Renewal FAFSAs using the same “888” identifiers the students used on their 2005-2006 FAFSAs. Because Pacific Islander students are not eligible for a PIN, they cannot access Renewal FAFSA data on the Web and will need the assistance of an FAA with access to FAA Access to CPS Online to reapply for aid.
- **Elimination of ISIR-specific Comment Codes and Text.** The ISIR record now uses the same set of comment codes and text as the paper Student Aid Report (SAR). A separate set of comment codes and text specific to transactions originating from a Web application or correction will continue to be maintained.
- **FSA Hurricane-Related Initiatives:** Federal Student Aid has implemented numerous initiatives to assist students impacted by hurricanes in 2005. For more information, please see the “Hurricane Information” section of the Information for Financial Aid Professionals (IFAP) Web site, located at ifap.ed.gov/eannouncements/katrina.

We also took into account the many valuable suggestions gathered from focus group panels, beta test participants, and Electronic Access Conference (EAC) attendees in determining this year’s product designs. We thank all of you who have provided input on our systems and software throughout the past year.

XML ISIR Implementation

Federal Student Aid will not implement the XML (Extensible Markup Language) ISIR for 2006-2007. We remain committed to XML as an effective tool to meet the current and future business needs of Federal Student Aid, 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 in 2006-2007 without significant impact to schools and other users.

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

- All schools continue to be required to be full participants using the Common Origination and Disbursement (COD) Common Record for 2006-2007.
- The XML Registry and Repository for the Education Community will be available in fall 2005. The XML Registry and Repository will house all XML schema related to the Standards Forum for Education.

Watch for further information on the revised implementation schedule. We are fully committed to community standards, which benefit everyone in the financial aid community. We look forward to the continuation of this endeavor.

Schedules

School Electronic Product Release Schedule

The following schedule provides expected release dates for 2006-2007 FAA Access to CPS Online, the 2006-2007 EDESuite PC software, and the 2006-2007 version of the ISIR Analysis Tool Web application.

You can download EDESuite software and the related user documentation from the U.S. Department of Education's (ED'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/FOTWWebApp/faa/faa.jsp) and from the View menu in EDEExpress for Windows 2006-2007.

Product	Modules/Functionality Included	Expected Release
FAA Access to CPS Online	<ul style="list-style-type: none">• Student Inquiry<ul style="list-style-type: none">– ISIR Compare– FAA Standalone Signature• Application/Correction/Verification Tool Entry<ul style="list-style-type: none">– Save/Restore functionality• ISIR Request• ISIR Analysis Tool• Return of Title IV Funds	January 1, 2006* * CPS processing begins January 3, 2006

School Electronic Product Release Schedule (Continued)		
Product	Modules/Functionality Included	Expected Release
SSCR for Windows, Release 3.0	<ul style="list-style-type: none"> • Enrollment Reporting 	November, 2005
EDEExpress for Windows 2006-2007, Release 1.0	<ul style="list-style-type: none"> • Global functionality • Application Processing module • Packaging module 	January 2006
EDEExpress for Windows 2006-2007, Release 2.0	<ul style="list-style-type: none"> • Direct Loan module • Pell module 	March 2006
Direct Loan (DL) Tools, Release 6.0	<ul style="list-style-type: none"> • Compare the School Account Statement (SAS) report loan/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 • Track cash receipts and refunds of cash using the Cash Management utility • Rebuild your Direct Loan origination and disbursement records in EDEExpress using an automated process 	July 2006

School Electronic Product Release Schedule (Continued)

Product	Modules/Functionality Included	Expected Release
<p>ISIR Analysis Tool 2006-2007</p>	<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 by creating flat ASCII files of Social Security Numbers (SSNs) • 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 	<p>February 2006</p>

Message Classes

2006-2007 ISIR Message Classes

The following table displays the ISIR data message classes used by the Central Processing System (CPS) for the 2006-2007 award cycle. For a complete listing of message classes used by the CPS for application processing, please see Section 4 of the *2006-2007 EDE Technical Reference*.

ISIR Type	Message Class	Description
Daily	IGCO07OP	Daily ISIRs that are the result of correction records submitted by your school
Daily	IDAP07OP	Daily ISIRs that are the result of application records submitted by your school
Daily	IDSA07OP	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	IDRE07OP	Daily ISIRs for State Agency residents
Daily	IDNR07OP	Daily ISIRs for State Agency non-residents

2006-2007 ISIR Message Classes (Continued)

ISIR Type	Message Class	Description
CPS Pushed	IGSG07OP	<p>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	IGSA07OP	Pushed automatic ISIRs that are generated for all schools listed on the record except the school that submitted the correction
CPS Pushed	IGRE07OP	Pushed ISIRs for State Agency residents
CPS Pushed	IGNR07OP	Pushed ISIRs for State Agency non-residents
Requested	ISRF07OP	ISIRs requested directly from the ISIR Datamart
Errors	EAPR07OP	Error records from processing of application data
Errors	CORE07OP	Error records from processing of correction data
Errors	SIGA07OP	Error records from processing of signature records

2006-2007 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 2006-2007, Release 2.0 software. You can also choose to receive data from COD in 2006-2007 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 *2006-2007 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	CRAA07IN	Common Record Document sent to COD
Export	Pell	PGRQ07IN	Pell Data Request sent to COD
Import	Pell and Direct Loan	CRAA07OP	Common Record Response sent by COD
Import	Pell and Direct Loan	CRRC07OP	Common Record Receipt sent by COD
Import	Pell and Direct Loan	CRWB07OP	COD Web-Generated Response (generated by activity on COD Web site)
Import	Pell	CRND07OP	Pell Negative Disbursements (COD system-generated)
Import	Direct Loan	CRBN07OP	Direct Loan Booking Notification (COD system-generated)
Import	Direct Loan	CRCO07OP	Direct Loan Credit Decision Override Response (COD system-generated)
Import	Direct Loan	CRPS07OP	Direct Loan Payment to Servicing (COD system-generated)

2006-2007 COD Message Classes (Continued)

Type	Program Affected	Message Class	Description
Import	Direct Loan	CRPN07OP	Direct Loan Master Promissory Note (MPN) Response (COD system-generated)
Report	Pell	PGRA07OP	Pell Data Request Response
Report	Pell	PGAS07OP	Pell Electronic Statement of Account (ESOA)
Report	Pell	PGMR07OP	Pell Multiple Reporting Record (MRR)
Report	Pell	PGRC07OP	Pell Reconciliation Report
Report	Pell	PGYR07OP	Pell Year-to-Date Record
Report	Pell	PGSN07OP	Pell SSN/Name/Date of Birth Change Report (preformatted)
Report	Pell	PGTX07OP	Pell Text File
Report	Pell	PGPD07OP	Pell Pending Disbursement Report (preformatted)
Report	Pell	PGFD07OP	Pell Funded Disbursement Report (preformatted)
Report	Pell	PGVR07OP	Pell Verification Status Report (preformatted)
Report	Pell	PGPR07OP	Pell Potential Overaward Process (POP) Report
Report	Direct Loan	MPNDISOP	MPN Discharge Report (preformatted)*
Report	Direct Loan	MPNINAOP	Expired MPN Report (preformatted)*
Report	Direct Loan	MPNEXPOP	MPNs Due to Expire Report (preformatted)*

***Important Note:** EDEExpress for Windows 2006-2007 will only import the fixed-length preformatted versions of these COD-generated reports.

2006-2007 COD Message Classes (Continued)

Type	Program Affected	Message Class	Description
Report	Direct Loan	CODRBFOP	Direct Loan Rebuild File (must be imported into DL Tools Release 6.0 software)
Report	Direct Loan	DSDF07OP	School Account Statement (SAS) – Disbursement Detail (must be imported into DL Tools Release 6.0 software)
Report	Direct Loan	DSLFF07OP	School Account Statement (SAS) – Loan Detail – Loan Level (must be imported into DL Tools Release 6.0 software)
Report	Direct Loan	DIAA07OP	Pending Disbursement List (preformatted)
Report	Direct Loan	DIAO07OP	Funded Disbursement List (preformatted)
Report	Direct Loan	DIWR07OP	30 Day Warning Report (preformatted)
Report	Direct Loan	DECF07OP	Entrance Counseling Results from Servicing Web site
Report	Direct Loan	DLFF07OP	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

The following 2006-2007 FAA Access to CPS Online Web site topics are described in the following sections:

- Enrollment for FAA Access to CPS Online
- Enhancements
 - Personal Identification Number (PIN) Process
 - FAA Access to CPS Online
- ISIR Datamart
- Demonstration Site

Enrollment for FAA Access to CPS Online

To ensure your school can take full advantage of 2006-2007 enhancements at the beginning of the processing cycle:

- The Destination Point Administrator (DPA) of the TG number used to send and receive FAFSA and ISIR correction data should verify your enrollment status.
 - If your school is enrolled for 2005-2006, your enrollment status rolls over to 2006-2007.
 - If your school is not enrolled, your school's DPA can complete the enrollment for FAA Access to CPS Online site services for your school through the Student Aid Internet Gateway (SAIG) Enrollment Web site, located at:

fsawebenroll.ed.gov

Enhancements

PIN Process

Several enhancements have been made to the PIN process. The PIN site is available at pin.ed.gov. The four main enhancements are listed below:

- **Improved Turnaround Time for Receiving Duplicate PINs.** Within four hours of a duplicate PIN request, the user will receive a PIN e-mail containing instructions for retrieving the PIN. The current turnaround time for duplicate PIN requests is 12 hours.
- **Improved Turnaround Time for Receiving New PIN E-mails.** After new PIN application request data is matched successfully and returned by the SSA, PIN notification e-mails are now sent as soon as possible to recipients, rather than during a single nightly processing run.
- **Decreased PIN Expiration Time.** The PIN expires after 18 months of non-use instead of 30 months. When users attempt to use an expired PIN the following text displays: “Our records show that your PIN has been inactive for 18 consecutive months. Your PIN was deactivated to protect you from unauthorized use of your PIN. To reestablish your PIN, you need to reapply for a PIN. To reapply for a PIN, go to the PIN homepage and select Apply for a PIN. To exit, select PIN HOME.” Users can reapply for a PIN by following the instructions.
- **Changed the Agreement Activation Text.** The PIN activation process requires that the user “Agree” not to share his or her PIN. To make it clear to the user, the agreement label is updated to read, “I agree not to share my PIN.” It is very important that PIN users do not share their PIN with anyone because the PIN can be used to access personal information and to provide an electronic signature.

FAA Access to CPS Online

Application Entry

For the 2006-2007 processing cycle, several enhancements were made to Application, Renewal, and Correction Entry through FAA Access to CPS Online:

- **Enrollment Plan More Prominent.** The Enrollment Plan question is now more prominent to decrease the chances that it will be accidentally skipped.
- **“Run Final Check” Relabeled “Calculate EFC.”** To provide better guidance to FAAs, we have relabeled the “Run Final Check” button to “Calculate EFC.”

- **Added Detail to the “Application on File” Page.** If FAAs attempt to complete a subsequent application for a student, they receive the “Application on File” page. This page displays additional information based on the status of the previously submitted application. The following instructions display if the application is processed:
 - Link to Student Inquiry to view processed information
 - Link to FAA Correction Entry to make corrections to the processed information
- **Added New Required Web Fields.** The additional fields now required to be completed in Web applications are described below:
 - Spouse’s Income (if Student’s Marital Status is married)
 - Mother’s and Father’s Income (if Parents’ Marital Status is married and the student is dependent)
 - Mailing State

Renewal Application Entry

- **Added Edit for Name and Date of Birth.** We added a new edit that verifies the name and date of birth (DOB) entered on the Login page match what is on the renewal application. If the name and DOB do not match, the user receives an edit on the first page of the application asking the user to verify the student’s name and DOB.
- **FAA Access Renewal Entry for Pacific Islander Students.** FAAs can access and enter Renewal FAFSA applications for Pacific Islander students using FAA Access to CPS Online if the students meet the renewal application eligibility requirements. FAAs will submit the 2006-2007 Renewal FAFSAs using the same “888” identifiers the students used on their 2005-2006 FAFSAs.
 - Because Pacific Islander students are not eligible for a PIN, they cannot access Renewal FAFSA data on the Web and will need the assistance of an FAA with access to FAA Access to CPS Online to reapply for aid.

- **For 2006-2007, Renewal FAFSA on the Web will require students to enter data in some fields that were pre-filled in 2005-2006:**
 - Based on requests from the financial aid community, we will no longer carry forward and pre-fill any of the six Federal School Codes or the associated housing codes from the student's 2005-2006 application. In the past, it would have been possible for the student to neglect to enter a school code on the paper Renewal FAFSA, so school codes from the previous year were carried forward to ensure the student's record was sent to at least one school. Renewal FAFSA on the Web will require the student to enter at least one Federal School Code, so this is no longer an issue. This change will help decrease the number of ISIRs schools receive for students who are not attending their school.
 - Students will have to enter the values for the following additional fields:
 - Student's Number in College or Parents' Number in College
 - Student's Number in Household or Parents' Number in Household
 - Students and parents of dependent students will have to enter responses to the following asset questions unless they qualify for the Simplified Needs Test (SNT) or the Automatic Zero Expected Family Contribution (EFC) and are not required to fill out the information for consideration of other types of aid such as state aid:
 - Student's Business/Farm Net Worth
 - Student's Investment Net Worth
 - Parents' Business/Farm Net Worth
 - Parents' Investment Net Worth

Correction Entry

- **Added Step Links to Correction Entry.** Step links display at the top of the correction application. These links enable users to skip to a specific section to find the question they want to correct. Although these links were added above the entry portion of the page, the cursor continues to appear in the first entry field. Users who navigate using the keyboard will not have to tab through these links.
- **Assumed and Reported Values are Displayed.** We display both the assumed values and the reported values on the correction entry screen.
- **Updated Taxes Paid Estimator.** Only values that have changed need to be entered in the student and parent taxes paid estimator. If a field value has not changed, the estimator uses the value from the transaction being corrected.

- **Added List Changes Function After a Successful “Calculate EFC.”** Users can now access the list changes function from the ‘Print a Copy of the Application Information’ page after they “Calculate EFC” if no errors were found in the application. The list changes functionality has not changed.

Verification Tool

For the 2006-2007 processing cycle, several enhancements were made to the Verification Tool:

- **Added Worksheet C as Optional for Verification.** Users can now enter the value from Worksheet C in the Verification Tool. This value is not required for verification and is not used when calculating the tolerance.
- **Updated the Verification Tool Calculation.** Users are no longer required to enter values that are the same as the ISIR when using the Verification Tool. If the user does not provide an answer in the Tax/Worksheet column, we use the value reported in the ISIR column when calculating the tolerance.
- **Updated Verification Fields that Display for Students with a Dependency Override.** We continue to display the verification fields only for the student’s information if the student is independent and for both the parents’ and student’s information for a dependent student. However, if the student has a dependency override, we no longer display the parents’ fields for verification.

Other FAA Access Enhancements

Starting with the 2006-2007 cycle, the FAA Access to CPS Online Web site offers the following additional changes:

- **Removed Paper Renewal Application Request.** Our analysis shows that only a small number of students are using the paper Renewal FAFSA. Therefore, beginning in 2006-2007 we are discontinuing paper Renewal FAFSAs and the paper Renewal FAFSA request process. Electronic renewal applications are still available.
- **Decreased Hold Period Time.** Students who submit applications and indicate that they will mail a signature page or electronically sign later have their application placed in a hold file for seven days waiting for the signature. Previously this hold time was 14 days. During the seven-day hold period, FAAs can use the Standalone Signature feature to apply signatures if the necessary signatures have been obtained from the student and/or parent. If the seven days expire, applications are processed with signature errors. If a signature page or an electronic signature is received after the application is processed with a signature error, a new transaction is created with the appropriate signatures.

- **Added Student Identifiers to the FAA Standalone Signature Feature.** The FAA Standalone Signature feature includes student identifiers on all pages. This will help FAAs identify which transaction they are working on at any point in the signature process.
- **Replaced ISIR Comment Text.** The SAR comment text replaces the ISIR comment text. FAAs see the same SAR comment text as the student.
- **Changed Labels throughout FAA Access.** Labels throughout FAA Access were modified to be clearer and more consistent with each function.
- **Added a Last Date Updated Stamp.** Along the bottom of the home page a date stamp displays the last date the site was updated. This enables the user to easily identify when the site was last updated.

ISIR Datamart

The ISIR Datamart continues to be the centralized location for all ISIR data generated by the CPS. Schools, state agencies, and other authorized users request ISIRs through FAA Access to CPS Online and receive ISIR distributions from the datamart through the SAIG.

You can use Federal Student Aid's Participation Management System to establish your school's preference for receiving "daily" ISIR files or requesting ISIRs from the ISIR Datamart. For more information visit the SAIG Enrollment Web site at:

fsawebenroll.ed.gov

DPAs can Grant ISIR Request Rights to Other Users. A new option is available on the SAIG Enrollment Web site to allow DPAs to grant other users the ability to request ISIRs using the ISIR Request feature on the FAA Access to CPS Online Web site.

For more information on the ISIR Datamart, ISIR requests, and ISIR distribution options, please see Section 2 of the *2006-2007 EDE Technical Reference*.

Demonstration Site

The demonstration site can be used as a training tool for you and your financial aid staff and is available for use at fafsademo.test.ed.gov by the end of the November.

User Name: eddemo

Password: fafsatest

Note: The user name and password fields are case-sensitive.

The demonstration Web site offers most of the features of the production versions of the FAFSA on the Web and FAA Access to CPS Online Web sites.

Notes:

- Actual personal identifying information should never be used on this demonstration site as other users can view the data.
- No data is processed by the Central Processing System (CPS). An estimated Expected Family Contribution (EFC) is not calculated after an application is submitted. The EFC value is always 99999 for any test case on the demonstration site.
- The site provides preloaded test data and FAA login information.
- Saved data and submitted data are cleared from the database each evening.
- Printed signature pages include a “test sample” watermark and should not be mailed to the processor. The sample signature page is not accepted or processed.

What's New for EDESuite?

Overview

The following sections describe the major 2006-2007 cycle changes in the EDESuite software:

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

Note: If you are using EDEXpress for Windows (Release 1.0 or Release 2.0) for the first time in the 2006-2007 award year, review the “Enrollment Requirements and Training for New EDEXpress Users” section on the following page.

EDESuite Products Updated for Section 508 Compliancy

All 2006-2007 EDESuite PC products contain updates to software grids, field labels, and help text to ensure compatibility with screen reader technology used by the visually impaired, in compliance with Section 508 of the Rehabilitation Act.

Screen reader software cannot interpret color shading in EDESuite software entry fields or directly read the contents of software grid cells. To accommodate these restrictions, EDESuite software users will notice the following major changes:

- All software fields that are shaded yellow to indicate they are required will now also display a “-R” after the software label. The “-R” indicates the field is required.
- All software fields that are shaded blue after a previously saved value has been modified will now also display a “-C” after the software label. The “-C” text indicates the field has been changed. If the change is made to a field that is shaded yellow, the “-C” text will replace the “-R” text after the label.
- All software grids now display “floating” text descriptions of the contents of grid cells when cells are selected. The text appears one cell above the selected cell. The text lists Row number, Column title, and (if applicable) the current Value. Clicking once in a cell, or using the Tab key or arrow keys to move to a cell, displays the text. Clicking a second time, or using the Tab key or arrow keys to move from a cell, hides the text.

The first time you log in, the default user ID and password is SYSADMIN. The system then prompts you to change the default password by entering a new password and verifying it. Floating text is always enabled for the SYSADMIN user ID and always appears on the Startup Information dialog box. For all users other than SYSADMIN, floating text is disabled by default. To enable it, select the **Enable 508 Grid Functionality?** checkbox on the Security Users dialog box. To disable the floating text, you may go to **Tools, Setup, Security Users** and create a new user ID and password. Exit the software, and then log back in with your new user ID and password.

Note: Users will always see the “-R” and “-C” labels added to software fields.

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 2006-2007 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 2005-2006 award year, your enrollment for that specific program only is automatically rolled over for the 2006-2007 award year. If you were enrolled with COD for both programs in 2005-2006, enrollment for both programs will be rolled over for 2006-2007.

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

fsaweb enroll.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 Federal Student Aid's 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 Federal Student Aid, including a computer-based training (CBT) course in EExpress Basics (also currently available at ifap.ed.gov/edexpress). This self-paced training course teaches basic skills required to access and navigate the EExpress and EDconnect software; beginning users can learn basic functionality and practice using the software in a simulated environment.

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

ed.gov/offices/OSFAP/training

Lastly, new EExpress users should review user documentation posted to the FSAdownload Web site (located at fsadownload.ed.gov) with each software release. User documentation includes the EExpress desk references, cover letters, and installation guide. These documents provide important information about each software release and step-by-step guidance on basic and advanced EExpress functionality.

New EExpress Pell and Direct Loan users may also want to review the *2006-2007 COD Technical Reference*, which is also available on the FSAdownload Web site.

EDExpress – Release 1.0

This section of the *School Electronic Process Guide* describes enhancements to EDExpress for Windows 2006-2007, Release 1.0. Release 1.0 contains the Application Processing and Packaging modules, as well as Global functionality, which is applicable across all EDExpress modules.

Global

The following enhancements have been made to EDExpress 2006-2007 Global functionality (applicable to all EDExpress releases and modules):

Security

- **FAA Access Setup Security Added.** For added security, we modified Security Groups setup to enable administrators to grant or deny access to the FAA Access setup screen for particular Security Groups. EDExpress users associated with a Security Group that does not have rights to view FAA Access setup will not be able to view or modify the FAA Access setup dialog box.
- **508 Grid Functionality Checkbox Added.** We added a checkbox, Enable 508 Grid Functionality?, to Security Users setup. This checkbox allows administrators to activate “floating” text descriptions of cell contents in software grids for staff who are using screen reader technology. Selecting this checkbox activates the floating text for a specific user ID, while clearing the checkbox deactivates the floating text for a specific user ID for all grids except the Startup Information dialog box. Floating text is always enabled for the SYSADMIN user ID and always appears on the Startup Information dialog box. For all users other than SYSADMIN, floating text is disabled by default.

Prior Year Import

- **Prior Year Global Setup Fields Added:** Prior Year User-Defined Queries, Setup, and File Formats Import now imports values for the following Global setup fields (listed by Global setup area) from the prior year’s EDExpress database:
 - FAA Access setup: All fields
 - System setup: Default E-mail Address and Default Address
 - Security Users setup: Automatically Transmit?

- **Prior Year Global File Format Import.** Prior Year User-Defined Queries, Setup, and File Formats Import now imports Global File Formats and associated fields from the prior year's EDEExpress database.
- **Prior Year File Format Field Count Limitation Added.** Prior Year User-Defined Queries, Setup, and File Formats Import no longer allows the import of a File Format from the prior year's EDEExpress database if more than 255 EDEExpress fields are selected in the File Format. In prior versions of EDEExpress, using a File Format with more than 255 fields resulted in software errors during the External Export process.
- **Prior Year Demographic Data Import.** Prior Year Demographic Data Import now imports values for the Demo tab fields E-mail Address 2 and Country Code from the prior year's EDEExpress Database.

Other Imports

- **Import and Export Files Automatically Backed Up.** EDEExpress automatically backs up your files rather than prompting you to back them up when 1000 files of the same message class already exist in the import or export directory. If EDEExpress determines that 1000 files of the same message class already exist, the software creates a backup subdirectory called "BACKUP" in your existing data directory and automatically moves the files into it. This prevents previously imported or exported files from being overwritten when you import or export new files.

Setup

- **File Formats Restricted to 255 Fields.** We modified File Format setup for all EDEExpress modules to allow users to add a maximum of 255 fields to each unique File Format. In prior versions of EDEExpress, using a File Format with more than 255 fields resulted in software errors during the External Export process.

Entry

- **Labels Modified for Yellow-Shaded Required Fields.** As part of the overall update of EDESuite software for Section 508 compliancy, all software fields that are shaded yellow to indicate they are required for the given tab, dialog box, or process now display "-R" after the label. Certain required fields, particularly those required in some circumstances but not others, are not displayed with yellow shading, and hence will not display the "-R" as part of the field label, even though the fields must be entered before a given process or function can be run.

- **Labels Modified for Blue-Shaded Modified Fields.** As part of the overall update of EDESuite software for Section 508 compliancy, all software fields that change to blue shading after a change is saved to a previous value in the field now display “-C” after the field label. The “-C” text only appears as part of the label after the change is saved. If the change is made to a field that is shaded yellow, the “-C” text replaces “-R” after the label.
- **“Floating” Text Added to Software Grids:** As part of the overall update of EDESuite software for Section 508 compliancy, software grids now display “floating” text descriptions of the contents of grid cells when cells are selected. The text appears one cell above (or one cell below, for cells in the first line of the grid) the selected cell. The text lists Row number, Column title, and (if applicable) the current Value. Clicking once in a cell, or using the Tab key or arrow keys to move to a cell, displays the text. Clicking a second time, or using the Tab key or arrow keys to move from a cell, hides the text. Floating text is always enabled for the SYSADMIN user ID and always appears on the Startup Information dialog box. For all users other than SYSADMIN, floating text is disabled by default. To enable it, select the Enable 508 Grid Functionality? checkbox on the Security Users dialog box. To disable the floating text, you may go to Tools, Setup, Security Users and create a new user ID and password. Exit the software, and then log back in with your new user ID and password.

Reports

- **Student Summary Report Displays Cents for Pell Awards.** We updated the Pell Grants section of the Student Summary report to print Pell award amounts in both dollars and cents. Previously, this report only displayed whole dollar values for Pell awards.

Application Processing

The following enhancements have been made to the EDEExpress for Windows 2006-2007, Release 1.0 Application Processing module:

General

- **References to IRS Telefile Removed.** We removed all references and functionality in EDEExpress related to the response of “Telefile” for Type of Tax Form Used (for student or parent). Telefile has been discontinued by the Internal Revenue Service (IRS) as of August, 2005.
- **DRN not Included in ISIR file.** The Data Release Number (DRN), which was field 137 in 2005-2006 ISIR files, has been changed to Filler. The DRN value will no longer be included in the ISIR file or printed on the ISIR, although the DRN will continue to be used in the same fashion as prior cycles. In the past the DRN was included on a student’s ISIR if the school submitted the original FAFSA electronically.

- **References to Paper Renewal FAFSA Removed.** Due to the elimination of the paper Renewal FAFSA form for 2006-2007, EDEExpress no longer displays or prints “4R – Paper – Renewal Application” as a value for the Application Data Source/Type Code or Transaction Data Source/Type Code fields on ISIR transactions.

FAA Access Interface

- **Link Added for Duplicate PIN Request.** We modified the FAA Access PIN Authentication and Automation Information dialog box to display an “I forgot/don’t know my PIN” link. Clicking this link redirects an EDEExpress user to the “Request a Duplicate PIN” option on the PIN Registration Web site. After submitting a duplicate PIN request on the PIN Registration Web site, the user receives an e-mail with his or her PIN information within four hours.
- **PIN Expiration Alert Added.** We modified EDEExpress to display a unique message to users whose PINs have expired due to 18 months of inactivity. Users with an expired PIN who submit their security login data on the FAA Access PIN Authentication and Automation Information dialog box will see a message explaining that their PIN is no longer valid. The users are redirected to the PIN Registration Web site to get a new PIN.

Import

- **ISIR Import ID Added to Import Edit Report.** We modified the import edit report generated after an ISIR file is imported to display the Import ID assigned to the ISIR records by EDEExpress.

Reports

- **ISIR Displays and Prints SAR Comment Codes.** In 2006-2007, the CPS is eliminating comment codes and text unique to the ISIR. As a result, EDEExpress now prints ISIRs displaying the same comment codes and text as the SAR.
- **Import File Name Associated with Import ID Displayed.** We modified the Import ID selection criteria grid available for certain Application Processing reports to display the import file name associated with the Import ID assigned by EDEExpress. This change makes it easier for users to filter reports for records associated with previously imported ISIR files.
- **Import ID Added to List-Processed ISIRs Report.** We modified the List-Processed ISIRs report to display the Import ID associated with the records printed on the report if that import ID is selected as criteria on the Print dialog box before running the report.

- **Fields Added to ISIR Print.** We made the following changes to the printed ISIR report:
 - The “Rejected Status Change Flag” and the “Verification Selection Flag” labels and values now print in the FAA Information section.
 - “Q99-Q103” prints after the Step Seven label (rather than “Q99-Q104”) to be consistent with the 2006-2007 FAFSA form.
 - The text “Close to or equal to limit” now prints if a value of “C” is present for the “Subsidized Loan Limit Flag” or the “Combined Loan Limit Flag.”
 - We renamed the NSLDS Aggregate Amount field “FFEL Unallocated Consol. Loans” to “Unallocated Consol. Loans.”
 - The NSLDS Aggregate Amount fields are now ordered as follows: Subsidized Loans, Unsubsidized Loans, Combined Loans, and Unallocated Consolidation Loans.

Packaging

The following enhancements have been made to the EDEExpress for Windows 2006-2007, Release 1.0 Packaging module:

Setup

- **Proration Maximum Increased in Academic Year Profile Setup.** Academic Year Profile setup now allows users to enter 100% for the Program Proration Percent field.
- **Fund Maintenance Balance Range Increased.** We modified Fund Maintenance setup to allow users to define a beginning balance and adjustments to the beginning balance of up to \$999,999,999 for a given fund code. Previously these fields were limited to maximum of \$99,999,999. Packaging reports displaying the fund balances have also been modified to accommodate the new maximum fund balance range.

Entry

- **Entry Flexibility Added to Record-Level Budget Changes.** We modified the Awards tab entry to allow users modifying budget amounts at the student record level to change the amount and title in each row in any order. In prior versions, the software required that users change the title first, followed by the amount.

EDEExpress – Release 2.0

This section of the School Electronic Process Guide describes enhancements to EDEExpress for Windows 2006-2007, Release 2.0. Release 2.0 contains the Pell and Direct Loan modules.

We recommend you also review the “Global” enhancements listed in the “EDEExpress – Release 1.0” section earlier in this guide for additional 2006-2007 changes affecting the EDEExpress Pell and Direct modules.

A section for new EDEExpress Release 2.0 users immediately follows this section.

Pell and Direct Loan

We have implemented enhancements affecting both the Pell and Direct Loan modules in EDEExpress for Windows 2006-2007, Release 2.0 in the following areas:

Pell and Direct Loan Import

- **Disbursement Data Reformatted on Response Import Edit Report.** We changed the format of the Disbursement Response section of the COD Response (message class CRAA07OP) import edit report to more clearly identify the data elements associated with each column heading.

Pell and Direct Loan Data Processing

- **Updated Valid Date Ranges.** We updated valid date ranges for Pell and Direct Loan processing for the 2006-2007 processing cycle to synchronize EDEExpress with COD edits and federal policy. These date ranges include:

Field	Range
Pell Enrollment Date	01/01/2006 to 06/30/2007
Pell Payment Period Start Date	01/01/2006 to 06/30/2007
Pell Disbursement Date	07/01/2006 to 09/30/2012
Date of Birth (DL only)	01/01/1907 to 12/31/1998
DL Award Begin Date	07/02/2005 to 06/30/2007
DL Award End Date	07/01/2006 to 06/29/2008

Field	Range
DL Academic Year Start Date	07/02/2005 to 06/30/2007
DL Academic Year End Date	07/01/2006 to 06/29/2008
DL Disbursement Date	06/22/2005 to 10/27/2008

Pell–Only Processing

The following enhancements affect the EDEExpress Pell module only:

- **Processed Date Field Renamed.** We updated all references to the “Origination Processed Date” field in the Pell module to read “Last Pell Processor Date.”
- **Pell Award Amount Displayed in Dollars and Cents.** We updated EDEExpress to display Pell award amounts in both dollars and cents throughout the Pell module, including:
 - Fields on the Pell Origination and Disbursement tabs
 - Fields printed on Pell reports
 - Values displayed in Pell Multiple Entry and Pell Browse

Direct Loan–Only Processing

The following enhancements affect the EDEExpress Direct Loan module only:

Entry

- **Master Promissory Note (MPN) Fields Renamed.** We updated all references of “Note” to “MPN” in the following fields:
 - “Signed Note Received” renamed to “Signed MPN Received”
 - “Date Signed Note Received” renamed to “Date Signed MPN Received”

Import

- **Import Statistics Dialog Box Modified.** The total number of processed records displayed on the Direct Loan Import Statistics dialog box is now calculated as the sum of accepted, rejected, and skipped records.

- **Packaging Data Import Error Description Revised.** When a user attempts to create a subsidized or unsubsidized loan record from a Packaging record with a Transaction # equal to “00” (on the Awards tab), EDEExpress now displays a more detailed error message explaining the error on the import edit report for the Loan Data – Packaging import.

Reports

- **DL Reports Group Records by Original Social Security Number (SSN).** Origination and disbursement data for student records is now grouped by Original SSN on all Direct Loan reports instead of Current SSN. This change makes it easier to identify borrowers in your database with the same Current SSN but different names, Original SSNs, and Loan IDs.
- **Disclosure Statement Loan Information Sort Order Added.** For consistency, the Loan Information section of the Disclosure Statement report always prints subsidized loan information before unsubsidized loan information when data for both loan types is present.

Query

- **Pre-Defined Query Parameters Modified.** We updated the criteria for the “LAA Not Equal to Endorser Amount” pre-defined query to filter for records with a Credit Decision value equal to E (Endorser OK), in addition to the current query criteria. This change will provide more accurate results for users attaching this query to reports or other EDEExpress functions.

New EDEExpress Release 2.0 Users

All schools submitting Pell or Direct Loan data to COD must be enrolled as Full Participants. All 2006-2007 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 2006-2007, Release 2.0 Pell and Direct Loan must also 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 not enrolled with COD as a Full Participant for the respective program in 2005-2006. 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 2005-2006 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 2006-2007.

EDEExpress 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 software or mainframe systems to communicate with COD in past cycles can use EDEExpress for Windows 2006-2007, Release 2.0 as an XML “translator.”

In this scenario a school would:

1. Use record layouts provided in the *2006-2007 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 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.
2. Import the COD Response file into EDEExpress to update the student records.
3. 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.
4. Perform an External Export from EDEExpress to create data files in flat file (non-XML) format.
5. Load the flat file from the EDEExpress External Export into your third-party software or mainframe system.

Direct Loan (DL) Tools

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

- Compare the School Account Statement (SAS) report loan/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.
- Track cash receipts (drawdowns) and Refunds of Cash for Direct Loan.
- Rebuild your Direct Loan origination and disbursement records in EDEExpress using an automated process.

DL Tools processes data for multiple cycles. Release 6.0, scheduled for release in July 2006, will contain Rebuild, Cash Management, and Compare functionalities for the 2004-2005, 2005-2006, and 2006-2007 cycles.

All Direct Loan schools can use the Compare and Cash Management functions. The Rebuild function allows EDEExpress schools to rebuild selected Direct Loan records or their entire Direct Loan database. Non-EDEExpress users can also use a Rebuild file to create an EDEExpress database and then export that data from EDEExpress into their own systems to rebuild a database they may have lost or corrupted.

As with other 2006-2007 EDESuite software, DL Tools Release 6.0 will include updates to software functionality and field labels to ensure compatibility with screen reader technology used by the visually impaired, in compliance with Section 508 of the Rehabilitation Act. See the section "EDESuite Products Updated for Section 508 Compliancy" earlier in this guide for more information.

Listed below are the additional planned enhancements to DL Tools for Windows, Release 6.0:

General

- **2003-2004 Functionality Removed.** We are removing all DL Tools functionality applicable to program year 2003-2004. This includes the elimination of all COD Phase-In Participant Rebuild fields.
- **Program Year 2006-2007 Added:** We are adding DL Tools functionality applicable to program year 2006-2007.

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 Data System (NSLDS).

NSLDS regularly sends you an Enrollment Roster, formerly called the SSCR Roster, containing the students enrolled at your school for which NSLDS has loan records. SSCR Release 3.0 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. You can change your preferences on the U.S. Department of Education's NSLDS Web site, located at nsldsfa.ed.gov.

In November 2005, we posted SSCR for Windows Release 3.0 to the FSAdownload Web site, located at fsadownload.ed.gov. SSCR Release 3.0 contains updates to software grids, field labels, and help text for compatibility with screen reader technology used by the visually impaired, in compliance with Section 508 of the Rehabilitation Act, as noted in the "EDSuite Products Updated for Section 508 Compliancy" section earlier in this guide.

In addition, the following enhancement and fix were implemented in Release 3.0:

- **Import and Export Files Automatically Backed Up.** SSCR automatically backs up your files rather than prompting you to back them up when 1000 files of the same message class already exist in the import or export directory. If SSCR determines that 1000 files of the same message class already exist, the software creates a backup subdirectory called "BACKUP" in your existing data directory (C:\NSLDS\FILES is the default data directory) and automatically moves the files into it. This prevents previously imported or exported files from being overwritten when you import or export new files.
- **Export Fills the Transmission Queue:** SSCR now fills the EDconnect transmission queue with SSCRXXIN or SSCMXXIN files you have exported if the "Export to EDconnect?" checkbox is selected for your user ID in Security Users setup.
- **"Automatically Transmit?" Feature Available.** SSCR will automatically begin transmitting exported files from the transmission queue if you have checked the "Automatically Transmit?" checkbox in setup (in addition to the "Export to EDconnect?" checkbox).

If you want to use Release 3.0, you should complete any pending SSCR Roster updates in SSCR Release 2.0, then uninstall Release 2.0 from your system and begin using Release 3.0 exclusively for your SSCR processing tasks.

Return of Title IV Funds (R2T4) on the Web

Return of Title IV Funds (R2T4) on the Web

R2T4 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.

Note: The most recent full version of the Return of Title IV Funds (R2T4) PC software release, Version 1.1, and the most recent service release, Version 1.1.2, are available on the FSAdownload Web site, located at fsadownload.ed.gov. You must install the full version before installing the latest service release. The R2T4 PC products will not be updated to comply with Section 508 of the Rehabilitation Act, as the R2T4 on the Web site is 508-compliant.

R2T4 on the Web is accessible through the FAA Main Menu of the FAA Access to CPS Online Web site (fafsa.ed.gov/FOTWWebApp/faa/faa.jsp) and from the View menu in EDEXpress for Windows 2006-2007.

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 included 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 ED.** This status page tracks the students referred to ED and the date the school referred them to ED.
- **Create New Record.** New student records are easily created by entering the student's 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 SSN.
 - **Student Notification.** This report lists 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 to repay their overpayment amounts appear on this report.
 - **School Portion of R2T4 Returned.** This report lists students for whom the school has returned or must return an unearned portion of Title IV funds.
 - **Students with a Post-Withdrawal Disbursement.** This report lists student records in your database with post-withdrawal disbursements at a complete or an incomplete status.
 - **Student Records Referred to ED.** Students appear on this report if their 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 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) or secondary destination point administrator (SDPA) 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. The DPA or SDPA 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 ED 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/FOTWWebApp/faa/faa.jsp).

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 SSNs) provided by your school. After the sample is selected, the ISIR Analysis Tool loads 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.
- Export a flat file listing of all student records in your ISIR Analysis Tool database to your SAIG mailbox under the message class IATX07OP.

The 2006-2007 version of the ISIR Analysis Tool will be available in February 2006, and will include the following enhancements:

- **Text Added to Export Page:** We added the following text to the Export page to provide additional guidance to ISIR Analysis Tool users: "This file is sent to your SAIG mailbox in the IATX07OP message class."
- **ISIR Comment Code Fields Removed from ISIR Datamart Requests.** ISIR data extracted from the ISIR Datamart as a result of a data request submitted from the ISIR Analysis Tool will no longer include ISIR comment codes.
- **Export Statistics Displayed.** The ISIR Analysis Tool displays the total number of records exported at the conclusion of the export process. This total provides ISIR Analysis Tool users with an indication of the number of records they will receive in the Export file (message class IATX07OP) sent to their SAIG mailbox.
- **Enhanced Primary EFC Ranges for Field Increments Report:** In response to user requests, we increased the number of pre-defined increment ranges displayed for the ISIR field Primary EFC on the Field Increments report. The report now displays the Primary EFC value range of 1 to 6,000 by increments of 500 and the range of 6,001 to 30,000 by increments of 3,000. The range of 30,001 to 99,999 remains unchanged.
- **Enhanced Student AGI Ranges for Field Increments Report:** In response to user requests, we increased the number of pre-defined increment ranges displayed for the ISIR field Student's Adjusted Gross Income (AGI) on the Field Increments report. The report now displays the Student's AGI value range of 1 to 10,000 by increments of 1,000 and the range of 10,001 to 60,000 by increments of 5,000. The range of 60,001 to 999,999 remains unchanged.

- **Increment Fields Sorted Alphabetically for Field Increments Report.** The ISIR fields displayed on the increments selection page displayed before running the Field Increments report are now sorted in alphabetical order so users can more easily locate the field they want to select.
- **Field Change Report Fields Sorted by Correction Rate.** The ISIR fields displayed on the Field Change report are now sorted by default in descending order by the number of records corrected for each field. The ISIR fields that are most frequently corrected are listed first, followed incrementally by fields corrected less often.
- **Text Values Displayed on Student Detail Report.** On the Student Detail report, if an ISIR field response is a numeric value with a textual equivalent, the text description is now displayed. For example, if the Student’s Citizenship Status field value is “1”, the Student Detail report displays “Eligible Citizen.”
- **User-Specified Fields Added to Standard Report Selection Criteria.** Users can now filter on user-specified fields and responses previously saved in the 2006-2007 ISIR Analysis Tool when choosing selection criteria for standard reports.
- **Assumed Fields Relocated in Ad-Hoc Report Selection Criteria.** All “assumed” ISIR values available for selection for ad-hoc (custom) report criteria are now listed at the bottom of field selection lists, sorted in alphabetical order.
- **Record Count Added to all Ad-Hoc Reports.** All ad-hoc reports generated from the Report Assistant component now display the total number of records in the report footer.

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) or secondary destination point administrator (SDPA) 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. The DPA or SDPA 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 current designated electronic processes and new minimal and optimal hardware and software requirements can be found in the September 2004 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 2006-2007 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)
- *Electronic Data Exchange (EDE) Technical Reference*
- *EDEExpress 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 FAFSA Process Guide*
- Restore Files to Customers' Mailboxes
- SAIG Network Password Changes and Resets
- SAIG Transmission Errors
- *SAR 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 Federal Student Aid 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, 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 ED. These references include phone numbers, e-mail addresses, Web site addresses, etc., and often have brief explanations of the entity's purpose. 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: 800/474-7268 (800/4PGRANT)
- Direct Loan School Services: 800/848-0978
- Direct Loan Applicant Services: 800/557-7394 (for student and parent borrowers)

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

The Federal Student Aid Information Center (FSAIC) assist students with address and school code changes, questions regarding completion of the FAFSA and SAR corrections, FAFSA status inquiries, requests for duplicate SARs, publication requests, and other general student financial aid questions. FSAIC can also provide student borrowers with the name and phone number of the holder of their loans.

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 Federal Student Aid'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 2006-2007 processing cycle. The documents are located on the Federal Student Aid download Web site, located at fsadownload.ed.gov, and on the Information for Financial Aid Professionals (IFAP) Web site, located at ifap.ed.gov.

- *Renewal FAFSA Process Guide*, available September 2005
- *Summary of Changes for the Application Processing System*, available October 2005
- *2006-2007 Electronic Data Exchange (EDE) Technical Reference*, available November 2005
- *The ISIR Guide*, available November 2005
- *Student Web Application Products Process Guide*, available November 2005
- *EDExpress for Windows 2006-2007, Release 1.0 Desk Reference*, available December 2005 (FSAdownload Web site only)
- *EDExpress for Windows 2006-2007, Release 2.0 Desk Reference*, available April 2006 (FSAdownload Web site only)

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 out more about the products and services described in this guide, as well as information about other student financial aid tools, 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/FOTWWebApp/faa/faa.jsp
- PIN: pin.ed.gov
- Common Origination and Disbursement (COD): cod.ed.gov
- Demonstration Web site: fafsademotest.ed.gov