

Session #10

What's New in EDExpress?

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U.S. Department of Education



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FEDERAL STUDENT AID

Agenda

- What's New in 2011-12?
- What's New in 2012-13?
- What's New in Direct Loan (DL) Tools?
- Where to Obtain Additional Help & Training?
- Contact Information

2011-2012



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GO FURTHER
FEDERAL STUDENT AID®

2011-12 Release 2.0 (ATB)

2011 - 2012 EExpress for Windows - [(999-99-9999) X]

File Process View Help

[SIR...] Original SSN: [.] [.] [.] Current SSN: [.] [.] [.] Open

Last Name: [X] Demo Address Info | Demo Date Info | Demo Status Info

First Name: [] Middle Initial: []

Current SSN: -R 999-99-9999 Original SSN: 999-99-9999

Date of Birth: [] Dependency Status: []

Ability to Benefit Code: [] Ability to Benefit Completion Date: [] [] [] [] [] [] [] []

Ability to Benefit Test Code: [] Ability to Benefit State Code: []

Ability to Benefit Test Administrator Code: []

Driver's License #: []

Driver's License State Code: []

Citizenship Status: [] Alien Registration #: A []

Verification Status Code: [] Transaction Paid On: []

Latest Original Student ID:

School Use: []

Permanent Address/Phone Info:

Permanent Address: [] Permanent State: []

Permanent City: [] Permanent Zip: [] Permanent Phone: [] [] []

Permanent Country Code: []

Local Address/Phone Info:

Local Address: [] Local City: [] Local State: [] Local Zip: [] Local Phone: [] [] []

E-mail Address 1: []

E-mail Address 2: []

Demo FAFSA Student Inquiry Docs Notes User Data Origination Disburse Awards

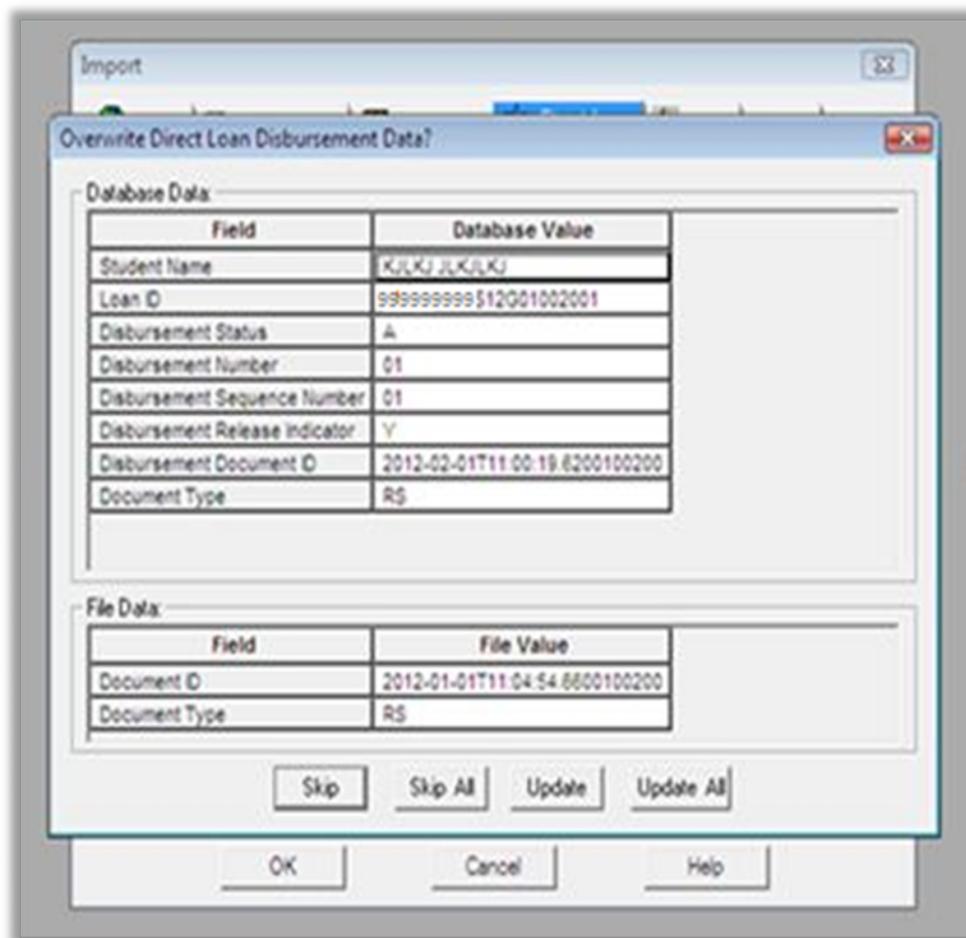
For Help, press F1 C:\IAM\DATABASE\expres12.mdb



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2011-12 Release 2.0 (Import)

- New import dialog warns when you are about to import a file that has older information than what is in the software for the student



2011-12 Release 2.0 (M/E)

- Fewer steps for schools that use the Loan Data - ISIR and Loan Data - Packaging imports to add and originate loans

Direct Loan Multiple Entry - Field/Records Selection

Default

#	Select	Field	Value	Change
10	<input type="checkbox"/>	College Grade Level		
11	<input type="checkbox"/>	Loan Entrance Interview Date		
12	<input type="checkbox"/>	Loan Exit Counseling Completed Date		
13	<input type="checkbox"/>	Disbursement Date		
14	<input type="checkbox"/>	Loan Amount Approved		
15	<input type="checkbox"/>	Disbursement Date		
16	<input type="checkbox"/>	Verify Change to Loan Amount Approved		
17	<input type="checkbox"/>	Verify Change to Anticipated Disbursements		

SSN File

File... [] ...

Report Destination

Printer File Screen

File... []

Sort By: Last Name

OK Cancel Help Selection Criteria

2011-12 Release 2.0 (Loan Type)

- DL ISIR and Packaging Imports will create multiple loan types in a single import

Select one or more loan types to create.

In Loan Data - Packaging import, if you do not select any loan type, a loan is created for each loan type packaged for the student.

2011-12 Release 2.0 (PLUS App)

2011 - 2012 EDEExpress for Windows - [(999999998-P-12-G99999-001) JOHN SMITH]

File Record Process View Help

ISIR... Original SSN: [] Current SSN: [] Open

Direct Loan | Pell Grant | TEACH Grant

Borrower Loan Information:

DL Code: [G99999]

Disbursement Profile Code: -R [CONT]

Loan Period: -R [09/01/2011] to -R [05/25/2012]

Academic Year: [07/01/2011] to [06/29/2012]

Dependency Status: [I]

Loan Amount Approved: [10000]

CPS Transaction #: [01]

Borrower's Loan Default/Grant Overpayment [N]

College Grade Level: [6]

Created By: SAMSMITH On: 10/03/2011 At: 14:52:47

Last Updated By: SAMSMITH On: 10/03/2011 At: 14:52:47

E-mail Address 1:

E-mail Address 2:

Loan ID: 999999998P12G99999001 1 of 3

Loan Info | PLUS Info | **Credit/PLUS App Info** | Change History

Credit Information:

Credit Decision: [A] Credit Decision Date: [/ /]

Original Credit Decision Status: Last Date Updated:

Credit Balance Option: Credit Decision Expiration Date:

Credit Appeal Status:

Endorser Amount: School Credit Balance Option

Credit Action Choice:

Credit Override Code:

PLUS Application Information

Application ID: [] Previous Application ID:

Unknown Loan Amount Six Month Deferment Option

Maximum Loan Indicator Deferment Option:

Application Loan Amount:

Application Submission Reason:

Application Complete Date:

Award Range Requested Start Date: Award Range Requested End Date:

2011-12 Release 2.0 (MPN Values "I" and "C")

Origination Entry Updated:

- Valid value
- Disbursements allowed
- Linking logic updated
- Delete excludes records with "I" or "C"

Reports:

- List – Sub/Unsub MPN
- List – PLUS MPN
- List – Grad PLUS MPN

Other:

- COD Response Imports
- Rebuild Import
- Query and Query Help
- Browse
- File format



2011-12 Release 3.0

- Pell Grant tables updated for the new cycle in the Global, Packaging, and Pell Grant modules
- CPS transaction number now a required field for PLUS and Grad PLUS loans

The screenshot shows a software window titled "Direct Loan" with tabs for "Direct Loan", "Pell Grant", and "TEACH Grant". The "Borrower Loan Information" section contains the following fields:

DL Code:	G99999		
DFASDF			
Disbursement Profile Code:	-R	PLUS	...
Loan Period:	-R	09/01/2011	to -R 05/25/2012
Academic Year:		07/01/2011	to 06/29/2012
Dependency Status:	I		
Loan Amount Approved:	10,500		
CPS Transaction #:	01		
Borrower's Loan Default/Grant Overpayment	N		
Student's Loan Default/Grant Overpayment	N		
College Grade Level:	1		
Created By:	On:	At:	
Last Updated By:	On:	At:	
E-mail Address 1:			
E-mail Address 2:			
Loan ID:	999999998P12G99999002		New Loan

2011-12 Release 4.0 (SSN Change)

- All processing systems now using “666” instead of “888” for Pacific Islander pseudo-SSNs
- EDExpress FAFSA tab now passes the “666” to FAA Access to CPS Online for Pacific Islanders

2011-12 Release 4.0 (MPN Response Text Change)

Report Date: 08/01/2011 U.S. DEPARTMENT OF EDUCATION PAGE: 1
 Report Time: 10:45:50 Federal Direct Loan Program 2011-2012
 MPN Response

THIS DOCUMENT CONTAINS SENSITIVE INFORMATION PROTECTED BY THE PRIVACY ACT

Document ID: 2011-08-01T10:34:25.4900100200

LOAN ID	MPN	REASON
CURRENT SSN	STATUS	
STUDENT NAME		
999999999P12G01002001	Valid MPN Not on File at COD	
999999999		
XXXXXXXX X. XXXXXXXX		
999999998U12G01002001	Valid MPN Not on File at COD	
999999998		
XXXXXXXX X. XXXXXXXX		

TOTAL RECORDS ACCEPTED	
TOTAL RECORDS IN ERROR	
TOTAL RECORDS PENDING	
TOTAL RECORDS SKIPPED	0
TOTAL RECORDS IN DOCUMENT	2



Report Date: 08/02/2011 U.S. DEPARTMENT OF EDUCATION PAGE: 1
 Report Time: 14:00:25 Federal Direct Loan Program 2011-2012
 Origination/Anticipated Response Import Edit Report

THIS DOCUMENT CONTAINS SENSITIVE INFORMATION PROTECTED BY THE PRIVACY ACT

Document ID: 2011-08-02T10:57:18.1800100200

Loan Id	Response Code	Error Code	Field In Error	Reported Value
999999999P12G01002001	R			
	MPN STATUS:		Valid MPN Not on File at COD	
999999998S12G01002002	R			
	MPN STATUS:		Valid MPN Not on File at COD	

TOTAL RECORDS ACCEPTED	0
TOTAL RECORDS IN ERROR	2
TOTAL RECORDS PENDING	0
TOTAL RECORDS SKIPPED	0
TOTAL RECORDS IN DOCUMENT	2



2011-12 Release 4.0

Spanish MPN
wording
updated:

N° de identificación

- Field #10:
 - Sub/Unsub MPN
- Field #13:
 - Grad PLUS MPN
 - PLUS MPN

2012-2013



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2012-13 Release 1.0-2.0 and DL Tools Release 12.0

- Updates made for Windows Vista compatibility test findings:
 - No longer require users to be an administrator to run the software for XP and Vista users
 - Note: Still need to be administrator to install

2012-13 Release 1.0-2.0 and DL Tools Release 12.0

- Updates made for Windows Vista compatibility test findings:
 - The Return to Dialog function will now return you to the previous dialog box
 - DL Disburse tab grid will display full labels
- Performing compatibility test with Windows 7 Professional 32-bit

2012-13 Release 1.0-Global

- **Verification Status Code** added to the Student Summary Report

```
Report Date: MM/DD/CCYY      U.S. DEPARTMENT OF EDUCATION      PAGE: 9999
Report Time:  HH:MM:SS      EDEXPRESS - CCYY-CCYY
                               Student Summary
                               Sort: Last Name
THIS DOCUMENT CONTAINS SENSITIVE INFORMATION PROTECTED BY THE PRIVACY ACT
*****

Name:      XXXXXXXXXXXXXXXXXXXX, XXXXXXXXXXXX X.
Original SSN: 999-99-9999
Current SSN: 999-99-9999
Date Of Birth: MM/DD/CCYY
E-mail Address 1: XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX
E-mail Address 2: XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX
Verification Status Code: X

ISIR TRANSACTIONS

Transaction ID      Primary EFC      Secondary EFC
-----
999-99-9999 XX 99      99999      99999
999-99-9999 XX 99      99999      99999

Active: 99
Paid On: 99
```



2012-13 Release 1.0-Apps

- All cycle year references now 2012-2013
- Pacific Islander SSN positions 4 & 5 incremented to "21"
- Comment codes will be updated to match SAR/ISIR text
- The institution school table will be updated with each software release

2012-13 Release 1.0-Apps

New ISIR field: Reject 21 Override
(marital status date change)

ISIR
Import
and
database
update

ISIR
Review
tab

View List
Changes

ISIR
Print

-Query
-Browse
-File
Format



2012-13 Release 1.0-Apps

New IRS Request Flag values of "05" and "06", also reworded blank-04 for Parent and Students*

ISIR Import
and
database
update

FAA
Information

ISIR Print

-Query
-Query
Value Help
-File
Format

* IRS Data Retrieval Options



2012-13 Release 1.0-Apps

New ISIR fields: Student and Parent Asset Threshold Exceeded fields and Parent and Student Asset Threshold Exceeded Assumed fields				
ISIR Import and database update	ISIR Review tab	View List Changes	ISIR Print	-Query -Browse -File Format



2012-13 Release 1.0-Apps

Added new ISIR valid value for the
Dependency Override of "4"
(Homeless Youth Determination)

ISIR
Import and
database
update

ISIR Print

-Query
-Browse
-File
Format



2012-13 Release 1.0-Apps

New ISIR valid value for ISIR DL Sub/Unsub, PLUS, and Grad PLUS MPN Flag of "E" *			
ISIR Import and database update	View - NSLDS	ISIR Print	NSLDS Print

* Inactive due to Endorser

2012-13 Release 1.0-Packaging

- All cycle year references now 2012-13
- Pell Grants Payment and Disbursement schedule is currently the 2011-12 schedule
 - See future IFAP electronic announcements for schedule changes

2012-13 Release 2.0-Direct Loan

- All cycle year references now 2012-13
- Loan Period Begin Date and Academic Year Start Date will be: On or before 6/30/2013
- Loan Period End Date and Academic Year End Date will be: On or after 07/01/2012

2012-13 Release 2.0-DL

- DOB range will be: 1/1/1913 to 12/31/2004
- Disbursement date range will be: 06/21/2009 to 12/28/2016
- **Enrollment school code (Enroll OPE ID)** required for all anticipated and actual disbursements

2012-13 Release 2.0-DL (Setup)

School

Direct Loan | Pell Payments | TEACH

DL Code	Reporting Entity ID	Attended Entity ID	Enroll OPE ID	Funding Method	Default School?
G01002	00100200	00100200	09999999		<input checked="" type="checkbox"/>
					<input type="checkbox"/>

DRAFT

Total MPNs to be Printed: Print to (L)ocal or (P)ermanent Address?

MPN Print Option: Are You a Special School?

FAA Authorized Official: AUTHORIZED LOAN OFFICIAL Prompt to Create an Additional Sub/Unsub Loan During Origination Process?

Sub/Unsub Loan Fee Percentage: Entrance Interview Required Prior to Disbursement?

PLUS Loan Fee Percentage: Disclosure Statement Print Indicator:

Sub/Unsub Interest Rebate Percentage: Actual Disbursement Type:

PLUS Interest Rebate Percentage: Do You Use Multi-year MPNs at Your School?

OK Cancel Help



2012-13 Release 2.0-DL (Disbursement Entry)

2012 - 2013 EExpress for Windows - [(999999999-S-13-G01002-001) XXXXXXXXXXXXX X. XXXXXXXXXXXXXXXXXXXX]

File Record View Help

ISIR... Original SSN: [] Current SSN: [] Open

Direct Loan

Loan Type: DIRECT SUBSIDIZED Loan Amount Approved: \$2,000
 Loan #: 1 of 1 MPN Status: T **DRAFT**
 Loan Status: R Loan Entrance Interview Date: 08/27/2011

Action
 Disbursement #: 1 Disbursement Type: E Enroll OPE ID: 99999999 Add Disbursement

Disbursements Payments to Servicing

Disbursement						Net		Disbursement		Enroll		E	
#/Type	Sequence #	Date	Gross	Fee	Rebate	Amount	Adjusted	Release Indicator	Status	OPE ID	Document ID	E	
1/D	1	09/01/2011	1000	10	5	995	0	<input checked="" type="checkbox"/>	R	09999999			
2		01/01/2012	1000	10	5	995		<input type="checkbox"/>					
3								<input type="checkbox"/>					
4								<input type="checkbox"/>					
5								<input type="checkbox"/>					
6								<input type="checkbox"/>					
7								<input type="checkbox"/>					
8								<input type="checkbox"/>					
Row 1. Column Totals.			Anticipated	Fee	Rebate	Net							
			Anticipated	2000	20	10	1990						
			Actual	1000	10	5	995						

Demo FAESA Student Inquiry Docs Notes User Data Origination Disburse Awards



2012-13 Release 2.0-DL (Disbursement Entry)

2012 - 2013 EExpress for Windows - [(999999999-S-13-G01002-001) XXXXXXXXXXXXXXX X. XXXXXXXXXXXXXXXX...]

File Record View Help

ISIR... Original SSN: ... Current SSN: ... Open

Direct Loan

Loan Type: DIRECT SUBSIDIZED Loan Amount Approved: \$2,000
 Loan #: 1 of 1 MPN Status: T **DRAFT**
 Loan Status: R Loan Entrance Interview Date: 08/27/2011

Action
 Disbursement #: 1 Disbursement Type: A Disbursement Amount: Add Disbursement

Disbursements Payments to Servicing

#/Type	Sequence #	Date	Gross	Fee	Rebate	Net Amount	Adjusted	Disbursement Release Indicator	Status	Enroll OPE ID	Document ID	
1/D	Row 3. Column	Disbursement Date	01/01/2012		5	995	0	<input checked="" type="checkbox"/>	R	09999999		
2		01/01/2012	1000	10	5	995		<input type="checkbox"/>				
3								<input type="checkbox"/>				
4								<input type="checkbox"/>				
5								<input type="checkbox"/>				
6								<input type="checkbox"/>				
7								<input type="checkbox"/>				
8								<input type="checkbox"/>				
Row 1. Column Totals.			Anticipated	Fee	Rebate	Net						
			Anticipated	2000	20	10	1990					
			Actual	1000	10	5	995					

Demo FAFSA Student Inquiry Docs Notes User Data Origination Disburse Awards

For Help, press F1 C:\IAM\DATABASE\expres13.mdb



2012-13 Release 2.0-DL (Disbursement Entry)

2012 - 2013 EExpress for Windows - [(999999999-S-13-G01002-001) XXXXXXXXXXXXXXX X. XXXXXXXXXXXXXXXXXXXX]

File Record View Help

[SIR...] Original SSN: [] Current SSN: [] [Open]

Direct Loan

Loan Type: DIRECT SUBSIDIZED Loan Amount Approved: \$2,000
 Loan #: 1 of 1 MPN Status: T **DRAFT**
 Loan Status: R Loan Entrance Interview Date: 08/27/2011

Action
 Disbursement #: 1 Disbursement Type: 0 Disbursement Date: _/_/_ Add Disbursement

Disbursements Payments to Servicing

Disbursement						Net		Disbursement		Enroll			
#	Type	Sequence #	Date	Gross	Fee	Rebate	Amount	Adjusted	Release Indicator	Status	OPE ID	Document ID	E
1	D	Row 3. Column Disbursement Date	01/01/2012		5		995	0	<input checked="" type="checkbox"/>	R	09999999		E
2			01/01/2012	1000	10	5	995		<input type="checkbox"/>				
3									<input type="checkbox"/>				
4									<input type="checkbox"/>				
5									<input type="checkbox"/>				
6									<input type="checkbox"/>				
7									<input type="checkbox"/>				
8									<input type="checkbox"/>				
Row 1. Column Totals.				Anticipated	SS	Fee	Rebate	Net					
				Anticipated	2000	20	10	1990					
				Actual	1000	10	5	995					

Demo FAFSA Student Inquiry Docs Notes User Data Origination Disburse Awards

For Help, press F1 C:\IAM\DATABASE\expres13.mdb



START HERE
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2012-13 Release 2.0-DL (Origination Record Report)

Loan ID 999999999X99X999999999

ANTICIPATED DISBURSEMENTS

#	Date	Gross	Fee	Rebate	Net	Enroll OPE ID
1	MM/DD/CCYY	99999	99999	99999	99999	99999999
2	MM/DD/CCYY	99999	99999	99999	99999	99999999
3	MM/DD/CCYY	99999	99999	99999	99999	99999999
4	MM/DD/CCYY	99999	99999	99999	99999	99999999
5	MM/DD/CCYY	99999	99999	99999	99999	99999999
6	MM/DD/CCYY	99999	99999	99999	99999	99999999
7	MM/DD/CCYY	99999	99999	99999	99999	99999999
8	MM/DD/CCYY	99999	99999	99999	99999	99999999
9	MM/DD/CCYY	99999	99999	99999	99999	99999999
10	MM/DD/CCYY	99999	99999	99999	99999	99999999
11	MM/DD/CCYY	99999	99999	99999	99999	99999999
12	MM/DD/CCYY	99999	99999	99999	99999	99999999
13	MM/DD/CCYY	99999	99999	99999	99999	99999999
14	MM/DD/CCYY	99999	99999	99999	99999	99999999
15	MM/DD/CCYY	99999	99999	99999	99999	99999999
16	MM/DD/CCYY	99999	99999	99999	99999	99999999
17	MM/DD/CCYY	99999	99999	99999	99999	99999999
18	MM/DD/CCYY	99999	99999	99999	99999	99999999
19	MM/DD/CCYY	99999	99999	99999	99999	99999999
20	MM/DD/CCYY	99999	99999	99999	99999	99999999
Total		99999	99999	99999	99999	99999999

ACTUAL DISBURSEMENTS

Disb.#	Type	Seq.#	Date	Gross	Fee	Rebate	Net	Net Adj	Disb.Status/Reject Codes
Enroll OPE ID									Action Date
99	X	99	MM/DD/CCYY	99999	99999	99999	99999	-99999	X XXXXXXXXXXXX
999999999			CCYYMMDDXHHmssff99999999						MM/DD/CCYY
99	X	99	MM/DD/CCYY	99999	99999	99999	99999	-99999	X XXXXXXXXXXXX
999999999			CCYYMMDDXHHmssff99999999						MM/DD/CCYY
Totals				99999	99999	99999	99999	-99999	

PAYMENTS TO SERVICING

Document ID	Disb.#	Seq.#	Date	Payment Amt
CCYYMMDDXHHmssff99999999	99	99	MM/DD/CCYY	99999
Total				99999



2012-13 Release 2.0-DL (Enroll OPE ID also found in)

- Multiple Entry
- Import Loan Data – ISIRs and Packaging
- External Add/Change record layout
- External Add/Change import logic

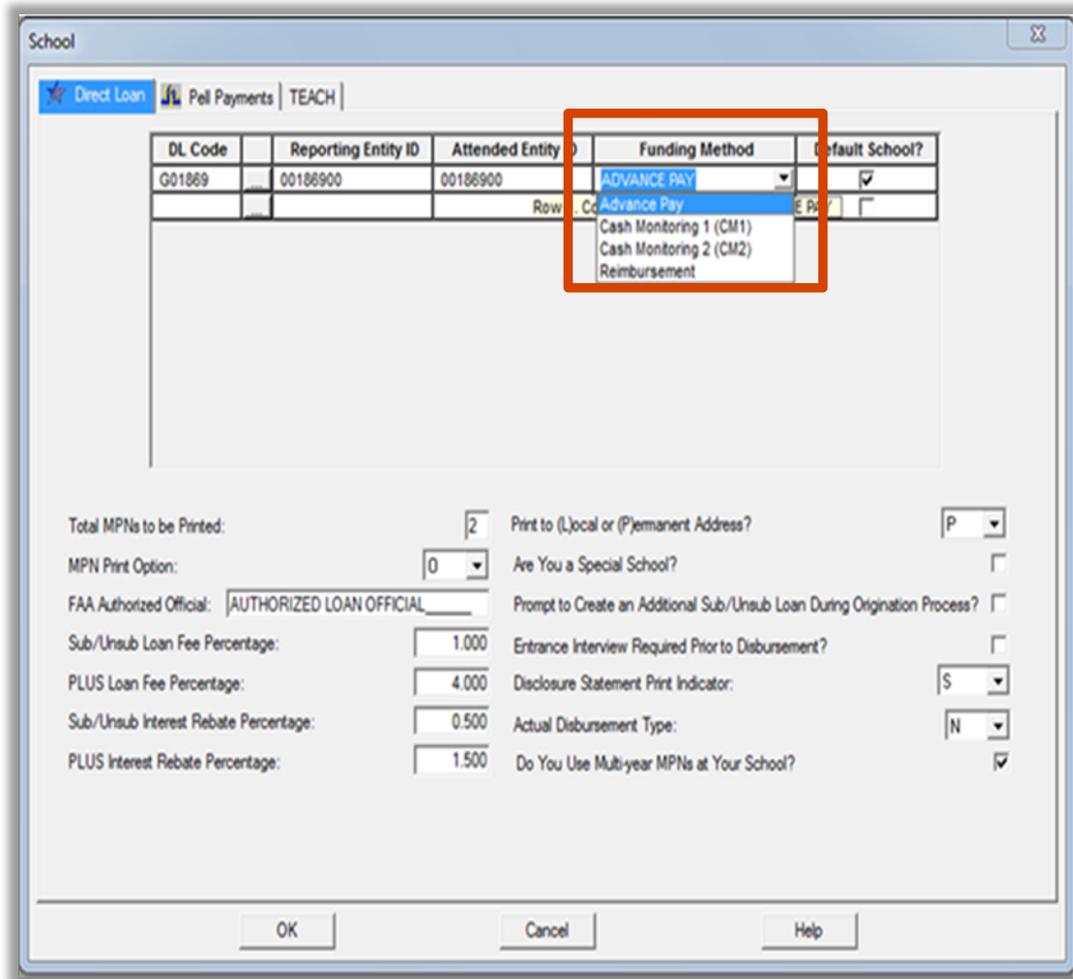
- Query
- Query Help
- Browse
- File Format

- COD Common Record Import
- COD Common Record Web Generated (WB) Import
- COD Common Record Export



2012-13 Release 2.0-DL (Funding)

- Pushed cash no longer funding method
- Affects:
 - Prior Year Import
 - Edits
 - School Setup



2012-13 Release 2.0-DL (Misc.)

- The “Additional Unsub Eligibility for Health Profession Programs?” checkbox will only be enabled for grade levels 6 and 7
- Disbursement Profile Code Setup – Direct Loan will display a warning edit if the disbursement date is more than 10 days before the Loan Period Start date

2012-13 Release 2.0-DL (MPN Value "E")

Origination Entry updated:

- Valid value
- Disbursements allowed
- Linking logic updated
- Delete excludes records with "E"

Reports:

- List – Sub/Unsub MPN
- List – PLUS MPN
- List – Grad PLUS MPN

Other:

- COD Response Imports
- Rebuild Import
- Query and Query Help
- Browse
- File format



2012-13 Release 2.0-Pell Grants

- All cycle year references now 2012-13
- Disbursement date range will be:
01/01/2012 to 09/30/2018
- Enrollment date range will be: 01/01/2012
to 06/30/2013
- Payment period date range will be:
01/01/2012 to 06/30/2013

2012-13 Release 2.0-Pell Grants

- Pell Payment and Disbursement Schedule is currently the 2011-12 schedule
 - See future IFAP electronic announcements for schedule changes
- **Enrollment school code (Enroll OPE ID)** required for all anticipated and actual disbursements

2012-13 Release 2.0-Pell Grants (Setup)

School

Direct Loan Pell Payments TEACH

School Identification Information
Reporting Pell ID: -R 001869 Attended Pell ID: -R 001869
Reporting Entity ID: -R 00186900 Attended Entity ID: -R 00186900
Enroll OPE ID: -R 99999999

FAA Information
Name: _____
Internet: _____
Telephone Number: -R (515)333-4444 ext. _____
FAX Number: () - -

Enrollment Information - For School Use Only
Enrollment Status: _____
Academic Calendar: _____
Payment Methodology: _____
Weeks of Instructional Time in Program's Definition of Academic Year: _____
Credit/Clock Hours in This Student's Program of Study's Academic Year: _____

School Information
Name: -R IOWA STATE UNIV SCIENCE & TECHNOLOG
Address 1: -R 0210 BEARDSHEAR HALL
Address 2: _____
City: -R AMES State: -R _____
Zip: -R - - Default School?

Miscellaneous Information
School Type: _____
Financial Control: _____
Funding Method: -R 1
Calculate Amounts Using Pennies?
Ineligible during Award Year?
Enrollment Date: ____/____/____

Cost of Attendance
1: -R \$15,000
2: _____
3: _____
4: _____
5: _____
6: _____
7: _____
8: _____
9: _____
10: _____

1 of 1
Add Delete Save Retrieve...

OK Cancel Help

2012-13 Release 2.0-Pell Grants (Disbursement Entry)

2011 - 2012 EExpress for Windows -

File Record View Help

ISIR... Original SSN: [] Current SSN: [] Open

Direct Loan Pell Grant TEACH Grant

Add Disbursements

Disbursement Number: [] Add Grant Type: Pell

Disbursement Date	Amount Submitted	Amount Accepted	Pay Period Start Date	Disbursement Status	Disbursement Release Indicator	Enroll OPE ID	Disbursement Cross Reference
09/01/2011	\$ 1125.00			R	<input type="checkbox"/>		
12/15/2011	Row 1. Column Amount Accepted. [Blank]			R	<input type="checkbox"/>		
03/15/2012	\$ 1125.00			R	<input type="checkbox"/>		
05/01/2012	\$ 1125.00			R	<input type="checkbox"/>		

Additional Information

Record: 1 of 1

CPS Transaction #: 01 Total Actual Disbursed Amount: \$ 0.00

EFC: 1033 Pell Processor YTD Total: \$ 0.00

Attended Pell ID: 001002 Award Amount: \$ 4500.00



2012-13 Release 2.0-Pell Grants (Origination Record Report)

```

Origination Record Page: X

EDITS
999, 999, 999, 999, 999, 999, 999

TOTAL NUMBER OF EDITS          99999

DISBURSEMENT INFORMATION
Name XXXXXXXXXXXXXXXXXXXX, XXXXXXXXXXXXXXXX   Award ID 999999999XXCCYY999999999
-----
DISB SEQ      AMOUNT      DISB DISBURSEMENT AMOUNT      DOCUMENT ID\
#      #      DATE      SUBMITTED  STAT RELEASE IND. ACCEPTED  ENROLL OPE ID
-----
99      99      MM/DD/CCYY $99,999.99  X      XXXXX      $99,999.99  CCYY-MM-DDTHH:nm:ss.ff99999999
                                     999999999
99      99      MM/DD/CCYY $99,999.99  X      XXXXX      $99,999.99  CCYY-MM-DDTHH:nm:ss.ff99999999
                                     999999999
99      99      MM/DD/CCYY $99,999.99  X      XXXXX      $99,999.99  CCYY-MM-DDTHH:nm:ss.ff99999999
                                     999999999
99      99      MM/DD/CCYY $99,999.99  X      XXXXX      $99,999.99  CCYY-MM-DDTHH:nm:ss.ff99999999
                                     999999999

Award Amount          $99,999.00          Accepted YTD Amount $99,999.99
    
```



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GO FURTHER
 FEDERAL STUDENT AID

2012-13 Release 2.0-Pell Grants (Enroll OPE ID also found in)

- Multiple Entry
- Import Origination Data-ISIRs
- External Add/Change record layout
- External Add/Change import logic

- Query
- Query Help
- Browse
- File Format

- COD Common Record Import
- COD Common Record Web Generated (WB) Import
- COD Common Record Export



2012-13 Release 2.0-Pell Grants (Funding)

- Just-in-time and pushed cash no longer funding methods
- Advanced funding method now seven days

School

★ Direct Loan Pell Payments TEACH

School Identification Information
Reporting Pell ID: -R [] Attended Pell ID: -R []
Reporting Entity ID: -R [] Attended Entity ID: -R []

School Information
Name: -R []
Address 1: -R []
Address 2: []
City: -R [] state: -R []
Zip: -R [] Default School?

FAA Information
Name: []
Internet: []
Telephone Number: -R [] - [] ext. []
FAX Number: [] - []

Enrollment Information - For School Use Only
Enrollment Status: []
Academic Calendar: []
Payment Methodology: []
Weeks of Instructional Time in Program's Definition of Academic Year: []
Credit/Clock Hours in This Student's Program of Study's Academic Year: []

Miscellaneous Information
School Type: []
Financial Control: []
Funding Method: -R []
Calculate Amounts Using Pennies?
Eligible during Award Year?
Enrollment Date: []

Cost of Attendance
1: -R []
2: []
3: []
4: []
5: []
6: []
7: []
8: []
9: []
10: []

NEW RECORD
Add Delete Save Retrieve...
OK Cancel Help

2012-13 Release 2.0-Pell Grants (G5)

```

Report Date: MM/DD/CCYY    U.S. DEPARTMENT OF EDUCATION    PAGE: 9999
Report Time:  HH:MM:SS    FEDERAL PELL GRANT PROGRAM - XXXX-XXXX
                        ELECTRONIC STATEMENT OF ACCOUNT
*****

PELL REPORTING SCHOOL IDENTIFIER                                999999
ENTITY IDENTIFIER                                              99999999
SCHOOL NAME                                                    XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX
STATE                                                           XX
GRANTEE DUNS NUMBER                                           999999999
G5 AWARD NUMBER                                               X999X999999

Transaction Date                                              MM/DD/CCYY

Previous Pell Grant Obligation                                $999,999,999.99
Current Pell Grant Obligation                                $999,999,999.99
Adjustment (Increase + or Decrease -)                        $999,999,999.99+

Previous Pell Grant Payments                                  $999,999,999.99
Current Pell Grant Payments                                  $999,999,999.99
Adjustment (Increase +)                                       $999,999,999.99+

G5 Drawdowns/Payments                                         $999,999,999.99
Date of Last Activity in G5                                  MM/DD/CCYY

YTD Total Unduplicated Recipients                            999,999
YTD Pell Accepted and Posted Disbursement Amount            $999,999,999.99
YTD Administrative Cost Allowance                            $999,999,999.99

As of Document ID/Batch ID                                  XXCCYY123456CCYYMDDHHMMSS

Payments apply only to "Obligate/Pay" accounts.
    
```



2012-13 Release 2.0-TEACH Grants

- All cycle year references now 2012-13
- Enrollment date range will be: 01/01/2012 or later
- Disbursement date range will be: 01/01/2012 or later
- **Enrollment school code (Enroll OPE ID)** required for all anticipated and actual disbursements
 - Expanded to eight bytes where currently exists as “School OPE ID”

2012-13 Release 2.0-TEACH Grants (Setup and Origination)

School

Direct Loan | Pell Payments | **TEACH**

School Identification Information

Federal School Code: -R 001002 ... **School OPE ID: -R 99999999**

Reporting Entity ID: -R 00001002 Attended Entity ID: -R 00001002

Miscellaneous Information

Funding Method: -R 2

Calculate Amounts Using Pennies?

Ineligible during Award Year?

Enrollment Information

Enrollment Status:

Enrollment Date: 09/01/2011

TEACH Grant

Student Information

Original SSN: 123456789

School Information

School OPE ID: 99999999

Federal School Code: 001002

Reporting Entity ID: 00001002

Attended Entity ID: 00001002

Origination Information

Award ID: 123456789H12001002001

Origination Status: Ready

Last COD Processor Date:

Document ID:

Record Source: M

Total of All Disbursement Amounts: \$1000.00

Last Updated

User: SYSADMIN

Date: 08/30/2011

Time: 09:54:56

Record: 1 of 1

Enrollment Information - For School Use Only

Enrollment Status: 1

ATS Information

ATS ID:

ATS Status:

Booked Information

Booked Date:

Booked Status:

Booked Document ID:

CPS Transaction #: -R 01

College Grade Level: -R 1

Enrollment Date: -R 09/01/2011

Award Amount for Entire School Year: -R \$1000.00

Disbursement Profile Code: -R ALL

Teacher Expert Indicator:

School Internal Sequence Number:

Origination Cross Reference:

E-mail Address 1: ina.student@electricu.edu

E-mail Address 2:

2012-13 Release 2.0-TEACH Grants (Disbursement Entry)

File Record View Help

[SIR...] Original SSN: [] Current SSN: [] Open

Direct Loan | Pell Grant | **TEACH Grant**

Add Disbursements

Disbursement Number: [] Add

Disbursement Date	Amount Submitted	Amount Accepted	Pay Period Start Date	Disbursement Status	Disbursement Release Indicator	Enroll OPE ID	Disbursement Cross Reference	Dx
Disbursement Sequence []	\$ 0.00			R	<input type="checkbox"/>			
12/31/2011	\$ 250.00			R	<input type="checkbox"/>			
03/15/2012	\$ 250.00			R	<input type="checkbox"/>			
06/01/2012	\$ 250.00			R	<input type="checkbox"/>			

Additional Information

Record: 1 of 1

CPS Transaction #: 01 Total Actual Disbursed Amount: \$ 0.00

School OPE ID: 00001002 COD Processor YTD Total: \$ 0.00

Award Amount: \$ 1000.00

12-13 Release 2.0-TEACH Grants (Origination Record Report)

Origination Record Page: X

EDITS
999, 999, 999, 999, 999, 999, 999

TOTAL NUMBER OF EDITS 99999

DISBURSEMENT INFORMATION

Name XXXXXXXXXXXXXXXXXXXX, XXXXXXXXXXXX X. Award ID 999999999X999999999999

DISB SEQ #	DATE	AMOUNT SUBMITTED	DISB STAT	DISBURSEMENT RELEASE IND.	AMOUNT ACCEPTED	DOCUMENT ID \ ENROLL OPE ID
99 99	MM/DD/CCYY	\$99,999.99	X	XXXXX	\$99,999.99	CCYY-MM-DDTHH:mm:ss.ff9999999999999999
99 99	MM/DD/CCYY	\$99,999.99	X	XXXXX	\$99,999.99	CCYY-MM-DDTHH:mm:ss.ff9999999999999999
99 99	MM/DD/CCYY	\$99,999.99	X	XXXXX	\$99,999.99	CCYY-MM-DDTHH:mm:ss.ff9999999999999999
99 99	MM/DD/CCYY	\$99,999.99	X	XXXXX	\$99,999.99	CCYY-MM-DDTHH:mm:ss.ff9999999999999999

{etc...}

Award Amount \$9,999.99

Accepted YTD Amount \$9,999.99



START HERE
GO FURTHER
FEDERAL STUDENT AID

2012-13 Release 2.0-TEACH Grants (Enroll OPE ID also found in)

- Multiple Entry
- Import Origination Data - ISIRs
- External Add/Change record layout
- External Add/Change import logic

- Query
- Query Help
- Browse
- File Format

- COD Common Record Import
- COD Common Record Web Generated (WB) Import
- COD Common Record Export



DL Tools

DL Tools

- Release 11.0 (June 2011):
 - Added servicer name to the SAS report
 - Cash and disbursement reports moved from import edit reports to print
 - SAS compare reports relocated from print to compare (new icon)
- Release 12.0 (June 2012):
 - Drops 2009-10 and added 2012-13
 - All references of GAPS renamed to G5

Future Releases?



2012-13 Future Releases?

- Additional changes may include:
 - Updated Pell Grants payment and disbursement schedules
 - Interest rebate percentage of zero for all loans first disbursed on or after July 1, 2012
 - Subsidized loans no longer available to graduate/professional students as of July 1, 2012

2012-13 Future Releases?

- Additional changes may include:
 - Remove Pell Grants funded disbursement report
 - Modify all references to Cash Monitoring 1 and Cash Monitoring 2 (CM1 or CM2) to Heightened Cash Monitoring (HCM1 and HCM2)
 - Remove all ACG and National SMART Grants functionality

2012-13 Future Releases?

- Additional changes may include:
 - Remove low tuition tables
 - Update the List-Processed ISIRs report to add the DOB and remove the VTF
 - Modify NSLDS import to update the TEACH Grants Exit Counseling completed date
 - DL Tools SAS compare future dated disbursements

Additional Help & Training

- At this Conference:
 - Session 18
 - Hands-On: Direct Loan Tools and EDExpress
 - Session 11
 - Direct Loan Tools
 - PC Lab

Additional Help & Training

- www.fsadownload.ed.gov
 - EDEExpress Desk References/Cover Letters/Installation Guides
 - Technical References
- www.ifap.ed.gov
 - EDEExpress Online Training for 2011–12
 - Publications
- EDEExpress Help Text

EDExpress Technical Assistance

CPS/SAIG Technical Support:

- Phone: 800-330-5947
- TDD/TTY services: 800-511-5806
- E-mail: CPSSAIG@ed.gov
- Representatives are available Monday through Friday, 8 a.m. to 8 p.m. ET

Contact Information

We appreciate your feedback and comments. We can be reached at:

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