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Student Financial Assistance



Session 17

Pell Hands-On #2

Managing Exceptions and Creating Meaningful Exceptions Reports EDExpress Pell Payment



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Introduction

- This session concentrates on how to effectively use EDEExpress to identify exceptions records and reconcile Pell data.
- Evaluations
- Questions





Agenda

- Pell Query Module Overview
 - Basic Query Functions
 - Highlight of Important Query Fields
- Hands-On Exercises



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Basic Query

- Parameter or (Prompt at Execution)
- Parenthetical Statements
- Value Help



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Parameter Query

Global App Express Packaging Direct Loan Pell

Title:
ORIGNATION STATUS =PARAMETER _____

Field: ORIGNATION STATUS Operator: = Value: Prompt at Execution

Append Remove Change And Or Value Help

Criteria 2000 - 2001 EDExpress for Windows

 Valid values are N = Not Ready, R = Ready, B = Batched, A = Accepted, E = Error and T = Transfer.

OK

Remove Right]

NEW RECORD

Add Delete Save Retrieve...

OK Cancel Help





User Enters Value

Parameter Query Entry

QUERY TITLE: ORIGINATION STATUS =PARAMETER

This parameter query allows you to access records from the database based on values that you specify. Please fill in values (parameters) for the following fields:

Field Name	Operator	Field Value	List Field Value
ORIGINATION STATUS	=	E	

OK Cancel Help Value Help View Query





Parenthetical

Query

Global App Express Packaging Direct Loan Pell

Title:
UPDATED ORIGNATION READY

Field: RFMS STATUS Operator: Value: Prompt at Execution C_

Append Remove Change And Or Value Help

Criteria:

```
(ORIGNATION STATUS = "R") AND  
((RFMS STATUS = "A") OR  
 (RFMS STATUS = "C"))
```

Add Left (Add Right)
Remove Left (Remove Right)

NEW RECORD
Add Delete Save Retrieve...



Important Fields

- Edit/Comment Codes:
 - Use Like and Not Like operators instead of =, <>, ... unless using Null value
 - Origination Edits/Comments Returned by RFMS
 - Disbursement Comments
- Null - leave field blank and Append - can be useful.





Origination Status

- EDExpress Origination Record Status
 - N = Not Ready
 - R = Ready
 - B = Batched
 - A = Accepted
 - E = Rejected (Error)



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RFMS (Origination) Status

- RFMS Origination Status returned on Origination Acknowledgement or Year to Date File
 - A = Accepted
 - C = Corrected
 - E = Rejected (Error)



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Disbursement Status

- EDExpress Disbursement Record Status
 - R = Ready
 - B = Batched
 - A = Accepted
 - E = Rejected (Error)





RFMS Disbursement Status

- RFMS Disbursement Status returned on Disbursement Acknowledgement or Year to Date File
 - A = Accepted
 - C = Corrected
 - E = Rejected (Error)



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Further Assistance

- Questions About The Pell Module Of The EDExpress Software Should Be Referred To CPS Customer Service At 1-800-330-5947, Option 4
- Questions About The Electronic Transmission Process Should Be Referred To Title IV WAN Customer Service At 1-800-615-1189





Further Assistance

- Questions About The Pell Process, Rejected Batches Or Account Information Should Be Referred To RFMS At 1-800-4-P-Grant (1-800-474-7268)



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Hands On!

- Please remember to always set print options to “Screen”
- We’re here to help, just flag us down.
- The Computer Lab is a great resource - feel free to drop in with any questions or issues.



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Please Remember Evaluations

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