
2003-2004 Desk Reference for

Application Processing

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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Introduction

Preface

This desk reference describes the general procedures for using the App Express module of the EDEXpress software. It is intended to provide basic instructions and is not intended to be comprehensive. For additional information, see the online Help within the EDEXpress software.

App Express, along with Global functionality, are the two components that you must install in order to run EDEXpress. With this program, you can enter a student's Free Application for Federal Student Aid (FAFSA) and update the student's information. You can also calculate an estimated EFC, view and print applications, and check applications for data entry errors. In addition, you can prepare batches of applications and transmit them to the Central Processing System (CPS). The CPS processes and electronically returns the applications to you as Institutional Student Information Records (ISIRs).

How to Download the Software and Documentation

EDEExpress for Windows 2003-2004, Version 9.0 is distributed via the Internet. You can download the software and the related user documentation from the U.S. Department of Education's Student Financial Assistance Download (FSAdownload) Web site located at FSAdownload.ed.gov.

Instructions for downloading EDEExpress for Windows are located in the "Downloading Software/Paper Documentation" chapter of the *EDEExpress for Windows 2003-2004 Installation Guide*.

If you experience difficulties with the EDEExpress for Windows, Version 9.0 software, contact CPS/WAN Technical Support at **800/330-5947** or via e-mail at cpswan@ncs.com.

Note: Some organizations restrict their users from downloading from FTP sites. If you have trouble downloading, try again later. If you are still unable to download, contact your technical support staff to ensure you have full FTP download rights.

Electronic Application Setup

Login Procedure

The Startup Information dialog box may be the first screen you see when you start EDEExpress. Other warning screens may appear if your EDEExpress database has been moved, deleted, or corrupted.

The first time you log in to EDEExpress, or if you haven't set up your assumed school code, EDEExpress displays a warning that your assumed school is not defined. A similar warning displays if you've installed the Direct Loan module and haven't set up your Direct Loan school profile. Once you've defined these codes in Setup, these warnings no longer appear.

1. From the Start/Programs menu, select **EDESuite/EDEExpress 2003-2004** and click **2003-2004 EDEExpress for Windows**.
2. If you see the Startup Information dialog box, click **Close**.
3. Type your user ID. If this is your first time logging in to the EDEExpress software, enter **SYSADMIN** as your user ID and password. The EDEExpress software prompts you to change the default password by creating a new one (continue with steps 4 and 5).
4. Press **Tab**.
5. Type your password. Valid passwords are one to eight characters long and can contain uppercase letters (A-Z), numbers (0-9), plus (+), dash (-), asterisk (*), number (#), period (.), and apostrophe (').

6. Press **Enter** or click **OK** to log in to the EDEExpress software.
7. Type the new password again in the **Verify Password** text entry box.
8. Click **OK**.
9. The “Prior Year Data” dialog box appears, offering you an opportunity to import your prior year setup data. If you want to do so, click **Yes**; if not, click **No**. (Note that instead of clicking the Yes or No button, you can hit the letters Y or N on your keyboard.)

Global Setup

Defining Security for Groups

There are two steps to setting up user IDs and passwords and assigning restricted access. The first step is to create templates, known as *groups*, for access to certain EDExpress functions. The second step is to assign each user ID to a specific group to designate which functions he or she will be able to access.

Step 1, Creating Security Groups:

1. Select **Tools, Setup, Global, Security Groups** from the menu bar.
2. Click **Add**.
3. In the **Group** field, type the name you are assigning to the group.
4. Click one of the tabs for the various modules, then click on the **Access** checkboxes in the table of functions to either enable or disable functions. For example, if you want users in a group to have access to setup options, click the **Global** tab, scroll down in the table until you reach the checkbox for the **Tools Menu Setup** and click on the checkbox to mark the function.
5. Click **Save**.
6. Click **Add** to create more groups, or click **OK** to exit the box.

Helpful Hints!

- Under Tools, Utilities, Clear Logged In Flag: You can give a group the ability to clear the Logged in? flag field which is displayed on the Security Users dialog box.
- Under Setup, Notes Entry Update: You can also give a group access to Notes entry to update the Notes tab on student records.
- Under Import, Import Demographic Data: You can allow a group of users to import demographic records to your EDExpress database.
- To create a group with read-only access to all tabs, click on the **Browse Only (Tabs)?** checkbox in the **Security Groups** box under Setup.
- To provide access to Entry, check the Entry checkbox within the File Menu.

Defining Security for Users

Step 2, Establishing User IDs:

Establishing user IDs and assigning each to a Security group:

1. Select **Tools, Setup, Global, Security Users**.
2. Type a user ID.
3. Click on the **down** arrow next to the **Group Name** field and click on one of the group IDs in the table.
4. Type a password.
5. Type the password again in the **Verify Password** field.
6. (Optional) Check the Export to EDconnect checkbox.
7. Click **Save** to add the user to the database.
8. Click **OK**.
9. Click **Add** to create more user IDs and passwords, or click **OK** to exit the **User Security** box.

Helpful Hint!

- You can also change passwords in the **User Security** dialog box; see online Help for instructions on changing passwords.

School Setup

You must establish an assumed school before you can create any student records. The assumed school data will appear by default on new EDExpress records. You can change the default information in individual records.

1. Select **Tools, Setup, Global, School**.
2. If you see the message, “No Assumed School,” click **OK**.
3. Click **Retrieve**.
4. When the School table displays, click the right mouse button on any column heading for additional search capabilities.

5. Click on your **school's name** and click **OK**. If the school code that now appears in the **School Code** field is the one that you want to appear by default on all new EDEExpress records, click the **Assumed School** checkbox and click **Save**.
6. Check **App Processing Participant** if you will be processing applications.
7. Click **OK**.

Note: You have the capability to import App Express System Setup data into EDEExpress. If the prior year's data has not changed, importing it saves you time because you do not have to reenter it. Go to **File, Import, Global, Prior Year User-Defined Queries**, and **Setup** to import the data.

Helpful Hint!

- You can also change the Assumed School in the **App Express System Setup** box. Select **Tools, Setup, App Express, System**.

Setting Up Global System Parameters

1. Select **Tools, Setup, Global, System**.
2. Click the **Allow notepad entries to be edited?** checkbox if you want EDEExpress users to create and edit notepad entries. If you clear this checkbox, users can only view notepad entries.
3. Click the **down** arrow for a drop-down list to select the default system (Global, App Express, or Packaging) to be displayed at the time of printing, importing, exporting, regenerating, deleting, creating queries, and creating file formats.
4. Type the number of days that you want to elapse before EDEExpress automatically reprints another Document Tracking letter for document codes that have not been marked as received when you print letters again.
5. Type the total number of times you want to reprint Document Tracking letters for each student.
6. Type the total number of Document Tracking letters you want to print for each student each time you print these letters.
7. Click the **Return to Dialog** checkbox if you want to return to the Print/Import/Export dialog box after printing a report, importing data, or exporting data.
8. If you want the Single or Multiple radio button selected by default on the Print dialog box, click the **down** arrow to select Single or Multiple.
9. Under Default Report File Destination, click the **down** arrow to choose the default. The options are Printer, File, Screen, or E-mail.

New for 2003-2004! We added the E-mail option as a possible default for the Report File Destination.

10. Type your **TG#**.
11. Click **OK**.
12. Click **Yes** to save the settings.

App Express System Setup

Assign default values that will appear in all new App Express records in the **App Express System Setup** box. The default values can be changed in individual records.

1. Select **Tools, Setup, App Express, System**.
2. (Optional) Enter your **Default Housing Plans** by entering the appropriate code: 1 = On-Campus, 2 = Off-Campus, 3 = With Parents. You may also click the **down** arrow to make your selection.

New for 2003-2004! The Default Housing Plans field in the App Express System Setup dialog box has changed from a text field to a drop-down list with flyover Help.

3. Type the default cost of attendance.
4. If you want to change the assumed school in this box rather than in the **Global School Setup** dialog box, you can do it quickly by typing the assumed school code in the **Assumed School** field. You can also click the **ellipsis (...)** button to access the Federal School Code database to make your choice.
5. Click on the **Update Demographic Data?** checkbox if you want EDEExpress to update the fields on the student's Demo tab when you import ISIRs. The demographic field is only updated when a higher transaction number is imported. Note that **Yes** is the default.
6. Click on the **Compare Demographic Data?** checkbox if you want EDEExpress to print a list of changes made to the Demo record during the ISIR import process as part of the Import Records Edit Report.
7. Select which Default Transaction you want to be displayed on the SAR/ISIR Tab. The choices are **Active** or **Highest**.

8. Click **OK**.

9. Click **Yes** to save the settings.

Note: You have the capability to import App Express System Setup data into EDEExpress. If the prior year's data has not changed, importing it saves you time because you do not have to reenter it. Go to **File, Import, Global, Prior Year User-Defined Queries, and Setup** to import the data.

Helpful Hint!

- Use the App Express System Setup box to set up your system parameters for the Application function of EDEExpress.

Query

A query is a set of criteria that describes a particular student population. Queries are used in functions like Print and Export to select specific groups of student records from all the records in the database. Some queries have fixed values, or you can enter different values each time you use the query.

EDEExpress comes with a set of predefined queries commonly used in Global, App Express, Packaging, Direct Loan, and Pell. When you select Tools, Query and click the **Retrieve** button for the first time, you'll see that the predefined queries are stored as the first set of records in the query database. Wherever the Selection Criteria option is available in EDEExpress, you can use these queries to identify groups of records. You can also use predefined queries as templates to create your own queries.

You'll know a query is predefined if you see "PREDEFINED QUERY" in the upper right corner of the Query screen.

New for 2003-2004! App Express queries are now available when you print multiple User Defined Letters from the App Express tab.

Helpful Hint!

- Use the Query function to create queries that are most useful to your school and the way you process data.

Rules For Queries

When creating your own queries, consider these basic rules:

- Queries are processed from left to right, or beginning to end; however, AND is applied first, even if it appears after OR in the query statement.
- Parentheses change the order of precedence. Expressions enclosed in parentheses are processed before AND and OR. In the case of nested expressions, innermost parentheses are processed first. See the topic **Using Parentheses** for more information.
- Both segments of the query connected by AND must be true for a field value to be selected.
- Only one of the segments connected by OR must be true for a field value to be selected.

Helpful Hints!

Mark the **field-to-field** checkbox to build a query that compares numeric fields within one record. For example, if a student has two ISIR transactions, a field to field query in App Express compares the numeric fields in the 01 transaction only with the other numeric fields in the 01, not with the numeric fields in the 02.

This option is not available if you marked Prompt at Execution or Current Date.

Click **Help Topics, Contents, Query** Dialog boxes for:

- Query dialog box
- View Query dialog box

Creating a Query

1. Select **Tools, Query** and a system by clicking on the corresponding tab.
2. Click **Add**.
3. Type a descriptive title for the query.
4. Select a field from the Field list. You can type the first few letters of a field to find the field name that begins with those letters.
5. Click the **down** arrow in the Operator field to select an operator.

6. Type a value for the field. Click the **Value Help** button to see the valid values for the field. If you want to be prompted for a value at the time you use the query, don't specify a value for the query statement. Instead, click the **Prompt at Execution** checkbox.
7. Click the **Append** button to add the query statement to the Criteria box.
8. (Optional) Click the **And** button or the **Or** button to add another statement to the query.
9. Repeat steps 4-7 until you've added all statements for the query, then continue with step 10.
10. Click **Save** to save the query. Click **OK**.
11. Click **OK** to close the Query box or click **Add** to create another query.

Helpful Hint!

- When you type a descriptive title for your query, note that the title can consist of any keyboard character, except the pipe symbol (|) and apostrophe (').

Creating a Query From a Predefined Query

1. Select **Tools, Query** and a system by clicking on the corresponding tab.
2. Click the **Retrieve** button. Use the arrow buttons in the control box to locate the predefined query you want to use for a template. Click **OK**.
3. Type a new title for the query. You can modify and save a predefined query only if you rename it.
4. Modify the query. Click any criteria line to select it and change the Field, Operator, or Value. Then click the **Change** button. You can also delete lines or add new lines to the query. (To add new lines, select the line that should appear after the new line. To delete a line, select the line and click **Remove**.) Specify the Field, Operator, and Value for the new line, then click **Append**. Use the other buttons located to the right of the Criteria box to fine tune the query statement, if necessary.
5. Click **Save** to save the query. Click **OK**.
6. Click **OK** to close the Query box or click **Add** to create another query.

Modifying a Query

1. Select **Tools, Query** and a system by clicking on the corresponding tab.
2. Click the **Retrieve** button. Use the arrow buttons in the database buttons box to locate the query you want to modify.
3. Modify the query. Click any criteria line to select it and change the Field, Operator, or Value. Then click the **Change** button. You can also delete lines or add new lines to the query. (To add new lines, select the line that should appear after the new line. To delete a line, select the line and click **Remove**.) Specify the Field, Operator, and Value for the new line, then click **Append**. Use the other buttons located to the right of the Criteria box to fine tune the query statement, if necessary.
4. Click **Save** to save the query. Click **OK**.
5. Click **OK** to close the Query box.

Using a Query

You can use queries in any function that displays a Selection Criteria button.

1. Click the **Selection Criteria** button.
2. Click the **ellipsis (...)** button next to the Query Title field to display a list of queries. The Query Grid dialog box displays.
3. Click on the query you want to use to select it.

If the Parameter Query column is not checked, click **OK**. EDEExpress returns you to the Selection Criteria dialog box and enters the title of the query in the Query Title field. Skip to step 9.

If the Parameter Query column is checked, click **OK** twice. The Parameter Query Entry dialog box displays. Continue to step 4.

4. Click in the **Field Value** column next to each Field Name and type a valid value. Click the **Value Help** button to see a list of valid values.

If you leave a value blank, EDEExpress automatically enters NULL as the value. When you run the query, records that contain NULL for that field value are returned.

5. Click the **View Query** button to see the completed query. Review the query carefully to be sure you've entered the correct values for each field.
6. Click **Close** to return to the Parameter Query Entry box.
7. Click **OK** to save your entries.
8. Click **OK** to run the query. A box displays the progress of the process.
9. Click **OK** to clear the In Process box.

Sample Queries

Here are three examples of queries that you can use in processing your students' financial aid data. Note that you can use "FAA Adjustment" as a field name.

See *Using a Query* on the next page for instructions on how to use these queries.

Sample 1

Dependent students from New Mexico whose parents' number in college is greater than 1 or whose adjusted gross income is less than \$25,000.

Click on the **App Express** tab.

```
((DEPENDENCY STATUS = "D") AND  
(STUDENT'S STATE OF LEGAL RESIDENCE = "NM")) AND  
((PARENTS' NUMBER IN COLLEGE > "1") OR  
(PARENTS' ADJUSTED GROSS  
INCOME < "25000"))
```

Sample 2

Unpackaged graduate students under 2000 EFC

Click on the **Packaging** tab.

```
(EFC-PACKAGING<2000) AND  
(COLLEGE GRADE LEVEL-PACKAGING = "5" AND  
((PACKAGING STATUS = "N") OR  
(PACKAGING STATUS = "U")))
```

Sample 3

Independent students assigned documents required for packaging and/or verification.

Click on the **Packaging** tab.

```
((DOCUMENT STATUS = "P") OR  
(DOCUMENT STATUS = "V") OR  
(DOCUMENT STATUS = "B")) AND  
(DEPENDENCY STATUS = "I")
```

Deleting a Query

1. Select **Tools, Query** and a system by clicking on the corresponding tab.
2. Click the **Retrieve** button. Use the arrow buttons in the database buttons box to locate the query you want to delete. You cannot delete predefined queries.
3. Click the **Delete** button in the Control box. EDEExpress asks you to confirm that you want to delete the query.
4. Click **Yes** to delete the query.
5. Click **OK** to continue.

Helpful Hint!

- You cannot delete predefined queries. For more information, click **Help, Help Topics, Contents, Query, Dialog boxes** and search for the topic *Query dialog box*.

Electronic Applications

Entering an Initial Application

A student's first application submission for financial aid is called an *initial application*. The screens in Entry are designed for fast data entry. The layout of the questions on the screens resembles the FAFSA. You can review the information, make corrections, and set reject and assumption override codes.

1. Select **File, New**.
2. Type a Social Security Number (SSN). Click **OK**.
3. Enter the student's demographic data.
4. Click on **File, Save** to save the student's demographic data.
5. Click on the **FAFSA** tab to enter FAFSA data. The initial application screen appears.
 - Enter data into the fields, pressing **Tab** to move from one field to the next, or **Shift + Tab** to move backward. Click the **1**, **2**, and **3** buttons on the toolbar to move from page to page.

You do not have to complete all required fields on a screen before advancing to the next screen. Press **F1** for Help on any field.

- Enter parental data for dependent students. (You can enter parental data for independent students if it is needed for certain programs.)
- If you want to calculate the estimated Federal income tax paid, select **Process, Tax Calculation** from the menu bar.
- If you want to calculate an estimated EFC, select **Process, EFC Calculation** from the menu bar.

6. When you finish entering the application, click **File, Save**.
7. Click **Yes** to mark the record ready for transmission.
8. Click **File, Close** to close the record.

If a demo record has previously been created for the student, click **Open** to retrieve the student's record and make changes.

Note that you can save a FAFSA prior to its completion by selecting **File, Save Without Edits**. FAFSAs saved without edits are saved at an "I" Status.

New for 2003-2004! We added a new field entitled "Marital Status Date" to Step Four, Parental Information, on the FAFSA and ISIR tabs. (On the FAFSA, this field is number 60.)

New for 2003-2004! We expanded the Veteran's Benefits amount to accept four digits (under Step One on the FAFSA and ISIR tabs).

New for 2003-2004! From the main menu bar of EDEExpress you can now access the **FAA Access** home page while you're in a student record. When you click this new link, EDEExpress will launch your default browser and bring up the FAA Access homepage. Note that FAA Access and EDEExpress will work independently of one another once your browser is launched. (Note that you must have a browser in order for this to function.) See the next paragraph about FAA Access Online.

FAA Access Online provides financial aid administrators with students' processed information. The module lists all the applicant's processed transactions which list the particular institution requesting the information. You can use FAA Access to view students' SAR data, check the status of batches, make PIN Requests, request duplicate Renewal Applications, enter a FAFSA or Renewal FAFSA, correct a processed FAFSA, among other tasks.

Dependency Override

Dependency overrides are used for students who are legitimately entitled to a dependency status other than what the software has determined based on responses to the application questions. (You can make a dependent student ‘independent,’ but you cannot make an independent student ‘dependent.’)

FAFSA AND SAR/ISIR TAB

Within EDEExpress, the Dependency Override drop-down box is located on the FAFSA and SAR/ISIR tabs, page 2, in the left-hand column below **Dependency Status (EDEExpress)**.

To change a student’s dependency status from dependent to independent, click the **Dependency Override** box and type **1** or select **1** from the drop-down list.

SAR/ISIR Tab (Only)

Within EDEExpress, the Dependency Override drop-down box is located on SAR/ISIR tab page 2, in the left-hand column below **Dependency Status**.

To change a student’s dependency status from dependent to independent, click the **Dependency Override** box and type 1 to override from dependent to independent or type 2 to cancel the dependency override.

Helpful Hints!

- If you print a copy of the student’s application before it has been processed by the CPS, the dependency override prints N.
- Remember, this action is only a request for a dependency override until the CPS has processed the application. However, if the application is calculated before being processed by the CPS, the EFC calculation takes the dependency override into consideration.

Batching Initial Applications

You can enter an unlimited number of applications before sending them to the Central Processing System (CPS). The next step after entering applications is to batch them. The combining of student initial applications into one group is called *batching*.

1. Click **File, Export, App Express**.
2. Verify that Applications - Initial is the Export Type.
3. Enter your **TG#**. You can then click the **Selection Criteria** button to further define the records you want to export, which is optional.
4. Click **OK**. You will see a progress bar within an In Progress box which will display the number of records exported, batch file name, and batch number.
5. Click **OK** to close the In Progress box.

Helpful Hints!

- There are many ways to enter data into the Transmission Queue in EDconnect. See EDconnect online Help or the *SAIG Desk Reference for EDconnect* for more information. You may download the *SAIG Desk Reference for EDconnect* from the FSAdownload Web site located at FSAdownload.ed.gov
- You can print export files by batch ID. There is also a selection criteria option available for the export process.

New for 2003-2004! On the export dialog box for the External ISIR export we added a Transaction Preference filter. “All,” “Highest,” and “Active” are the options for this field.

Importing Data into EExpress

Within three working days of exporting your processed FAFSAs to the CPS, they are available for you to receive from the network. See the EDconnect online Help or the *SAIG Desk Reference for EDconnect* at the FSAdownload Web site at FSAdownload.ed.gov for more information. You must import the data into EExpress before it can be used.

1. Select **File, Import, App Express**.
2. Under Import Type, click the **down** arrow to select ISIR Data.
3. Click the **File** button in the **Import From** section of the screen to select the file you want to import. Click **OK**.
4. Choose where you want to send the report: **File, Printer, or Screen**. If you choose **File**, click the **File** button and type a name for the file.
5. You may choose to select the following checkboxes on this screen:

- **Prompt for Duplicates?:** If you select this option, the system will send a duplicate record prompt if the record already exists.
- **Import NSLDS data?:** If you select this option, NSLDS data will be imported with your ISIR data.

New for 2003-2004! Within the NSLDS view dialog box (under **View, NSLDS** from the EExpress menu bar) we changed the label “Discharged” to “Discharged Loan Flag”.

New for 2003-2004! The “Pell Remaining Amount to be Paid” field has been deleted from the ISIR import, NSLDS dialog box, and the NSLDS report.

- **Identify Activated Transactions?:** If you select this option, the “Import Records Edit Report – Demographic Comparison” identifies when the imported transaction number differs from the Activated Transaction number currently listed on your database.
- **Identify incoming ISIRs with existing Packaging, DL, or Pell records?:** If you select this option, information about ISIR records added during the import process that have a Packaging, Direct Loan, or Pell record already in the database will print as part of the Edit Report.

- **Compare demographic data?:** If you select this option, information about the demographic data that is different will print as part of the Edit Report.
 - **Update demographic data?:** If you select this option, specific demographic data will be updated with the ISIR data being imported.
6. Click **OK** to import the file. A progress bar will appear within the In Progress box.
 7. Click **OK** to close the In Progress box.

Helpful Hints!

- When you import ISIRs and mark the Identify Active Transaction checkbox, the EFC of the active transaction and the EFC of the incoming ISIR display on the Import Edit Report IF the transaction number on the import file is greater than or equal to the transaction number on the database AND the EFCs are different.
- ISIR data import types are listed under one category, ISIR Data, within the Import Type dialog box.
- When a new ISIR is imported into EDEExpress, the Import Edit Report will display the “HAS FLAG” for Packaging, Direct Loan, and Pell if a record exists in those modules for the student.

New for 2003-2004! We added space for two additional postscreening reason codes for the ISIR Import, NSLDS view dialog box, and NSLDS report.

Printing Multiple ISIRs

Once you have imported ISIR records into EDEExpress, you can print the information. The ISIR print report includes all the application information submitted by the student, as well as the computed information from the CPS.

1. Select **File, Print**, and then click the **App Express** tab.
2. Be sure that **ISIR** is displayed in the **Report** field.
3. Click **Multiple**.
4. Choose where you want to send the reports: **File, Printer**, or **Screen**. If you choose File, click the **File** button and type a name for the file.
5. If you want to specify which ISIRs will be printed, you have several options.
 - You can select individuals or all the students in your data base by clicking the Selection Criteria button and the Select Records button.
 - You can select individual student's ISIRs using a list of Transaction Ids (trankeys) to specify which ISIRs will be printed. A Transaction ID (trankey) is the SSN + the first two letters of the last name + the transaction number.
 - Click the **ellipsis (...)** button in the SSN File section of the screen.
 - You can use a query to select students by clicking the Selection Criteria button and the Query Title **ellipsis (...)** button.
6. Click the **down** arrow in the **Sort Order** field and select **Last Name Order** or **SSN Order**. Records are sorted in order of last name, first name, and then transaction number when Last Name is chosen. The default is SSN order.
7. If you have a transaction preference, click the **down** arrow under **Transaction Preference?** and select **Highest, Active or All** to print the active transaction number or all transactions, respectively. If there is no activated transaction, the default is the highest transaction.

8. If you want to print a specific batch of ISIRs, enter the batch number in the Batch ID field or click on the **ellipsis (...)** button and select the batch number you want to print.
9. You may also choose to click the following checkboxes on this screen: Print FAA Comments, Print SAR Comments, Print Loan information, and Print Certification/Signature Page.
10. Click **OK**.

New for 2003-2004! The Print FAA Comments, Print SAR Comments, and Print Loan Information checkboxes on the print ISIR selection screen are now checked as a default. (You can uncheck them at any time.)

New for 2003-2004! You can now use Selection Criteria and filter for a batch ID at the same time when printing multiple ISIRs. This will give you added flexibility in narrowing your records for printing.

New for 2003-2004! We added a checkbox on the Print Dialog box (ISIR Report) entitled “Only print records with more than six loans?” to make printing ISIR Reports more efficient.

Electronic Corrections

Entering a Correction on the SAR/ISIR Tab

You can correct information on ISIRs through EDEExpress. When you make corrections, you can use the same assumption overrides, dependency overrides, and override the same rejects that are listed in the Electronic Application section.

1. Select **File, Open**.
2. Type the SSN (or click the **ellipsis (...)** button), then click **OK**.
3. Click the **SAR/ISIR** tab at the bottom of screen.
4. The latest student's **SSN | Name ID | Transaction Number** is displayed in the bar at the top of the record. To choose a previous transaction number, click the **<** symbol in the tool bar, select the transaction number you want, and confirm that record against the transaction number of the correction request. To return to a later transaction, click on the **>** symbol.
5. If a field is to be corrected, highlight the field and enter the data. If the data in a field must be verified, select **Process, Verify** from the menu bar. If you are deleting data from a field, select **Process, Correct to Blank** from the menu bar. Changes made to data are highlighted.
6. Select **File, Save** to save your corrections.
7. Click **Yes** to mark the record Ready for Transmission.

8. If you want to see a list of fields that have been changed for this record, select **Process, List Changes**.
9. After making corrections, you can access and change a record any time before transmitting to the CPS. Note that the corrected fields on a saved correction record appear in a different color.

New for 2003-2004! The Verification Tracking Flag now displays on the ISIR tab and on the FAA Information section of a printed ISIR. You can query on the flag and print lists based on the flag information.

New for 2003-2004! We made the student's e-mail address field on the SAR/ISIR tab correctable to blank.

Helpful Hints!

- You may skip from pages 1, 2, and 3 on the SAR/ISIR tab without edits. Edits will be applied to the record at the time that the record is saved.
- The **Process, List Changes** function displays both entered and processed data. Correction flags on the ISIR show which fields are corrected on the current transaction as well as those corrected on previous transactions.
- **Note:** If you want to view or keep a record of the corrections, select **File, Print**. Click the **App Express** tab and in the Report field, select List-Entered Correction Records. In the Report File Destination box, select **Printer** to get a printout of the report, **File** to save the report to a file, or **Screen** to view the file. Click **OK**.

Entering Quick Corrections

You can enter quick corrections on SARs or ISIRs without opening and paging through the student's entire record. This option is not available when a student's record is open.

1. Select **Process, Quick Correction...** from the menu bar. The **Quick Correction** box appears.
2. Type the SSN, Name ID, and Transaction Number for the student record you want to correct.
3. Click **Continue**.
4. Only enter data for the fields you want to correct. Use the scrollbar to access fields that are not viewable. Use the **Correct to Blank** button to change a value to blank. You can type a new School Code in the **Originating School** field (located below the grid), or click on the **ellipsis (...)** button to select a school from the Federal School Code file.
5. If you want to redo the correction before you save it, click the **Clear** button to erase all the changes for the unsaved correction record.
6. Click **Save** when you have finished entering corrections for this record.
7. Click **OK**.
8. Repeat steps 2 through 7 to correct another student record or click **Close** to return to the main menu.

Helpful Hints!

- Assumption Override Codes and Reject Override Codes can be corrected on the Quick Correction screen.
- Students can make corrections using FAFSA on the Web (fafsa.ed.gov).
- See the next page if you want to correct the Federal School Code.

Adding Your School Using the DRN (Data Release Number)

A school cannot make an electronic correction if it has not been designated on the applicant transaction. To add your school using the DRN, use the quick Correction Process. (Note: the DRN is a four-digit number assigned to all Title IV federal student aid applicants. It appears on the paper SAR.

1. Enter your school code in any of the **College Choice** fields. Enter the housing plan in the **Housing Plan** field: 1=On Campus, 2=Off Campus, 3=With Parents.
2. Enter the student's **DRN** in the DRN field.

Helpful Hint!

- To create a new transaction with the information from the student's most recent transaction and your school code, enter a student's SSN, Name ID, and transaction number 99. Provide both your School Code and the student's DRN.

Changing a Student's Social Security Number

There are two options for changing a student's Social Security Number (SSN):

- 1a. Create a new FAFSA with the correct SSN (this option is especially beneficial for students who have accidentally used their sibling's SSN; it also prevents two students from making corrections on two separate ISIR records with the same SSN).

OR

- 1b. Correct the SSN on the existing ISIR.
2. If you choose to correct the SSN on the existing ISIR, correct the current SSN field.
3. Save the record, batch it, and transmit it to the CPS. When you receive the processed correction back from the CPS, you will notice that the incorrect SSN and last name identifier Trankey (also known as the original SSN) remain the same; however, the student's correct SSN is listed on the ISIR as the current SSN.
4. The incorrect SSN and last name identifier remain with the student for the entire academic school year, even if it has been changed or corrected. The incorrect SSN will be the permanent record ID on all of these student records because the student's original SSN and name identifier becomes part of the record ID. This will also affect your students' Pell and Direct Loan ID.

FAA Adjustment

To make a professional judgement to a field:

- Modify specific data element(s) used in the EFC calculation and click the **FAA Adjustment** box, located on ISIR page 3, right-hand column, below Originating School on the Quick Correction List. A checkmark will appear.
- An FAA Adjustment cannot be made on a rejected record or on an initial application.
- You may make an FAA Adjustment in conjunction with a dependency override as long as the transaction you are correcting has a valid EFC; otherwise, do the Dependency Override first.

Batching and Exporting Corrections

To export (create a batch of) correction data, do the following:

1. Select **File, Export, App Express**.
2. Click the **down** arrow next to the **Export Type** field and select **Corrections**.
3. Your school code is displayed in the School Code text box. If incorrect, type your school code in the **School Code** text entry box, or click the **ellipsis (...)** button to select from a list of institution codes.
4. Your TG# displays on this screen if you have entered it in Global Setup. (If you have not, enter it now.) Enter only the five numeric values and not the T and G. You cannot export the file unless the TG# has been entered.
5. Click **OK**. You will see a progress bar within an In Progress box which displays the number of records exported, number of students processed, batch file name, and batch number.
6. Click **OK** to close the In Progress box.

The corrections can then be transmitted to the CPS using EDconnect. See EDconnect online Help or the *SAIG Desk Reference for EDconnect* at the FSAdownload Web site at FSAdownload.ed.gov for more information.

Helpful Hints!

- The In Progress box in step 5 displays the number of students in the batch which may be different than the number of correction records exported. This occurs when more than 12 fields have been changed on a student record. Line length limitations require the data to be sent in more than 1 record.
- Use the Select Records function for the Applications-Initial Corrections export.

Importing Processed Corrections

- Within three working days of export, your processed corrections are available for you to import from the network.
- Import the processed data, which includes the processed results (CORRs) or rejected records (COREs).
- You will receive one batch of ISIRs for each batch of correction records submitted.

Importing Corrections

The batch, or message class, of ISIRs containing the processed results is CORR04OP. It contains one ISIR for every submitted student record that was not rejected.

The message class for rejected records is CORE04OP. When imported, a report listing the students that were rejected in the batch can be displayed.

Both message classes can be received by EDconnect and printed in EDEExpress. See EDconnect online Help or the *SAIG Desk Reference for EDconnect* at the FSAdownload Web site at FSAdownload.ed.gov for information about receiving processed corrections.

Import the data into EDEExpress where it can be used.

1. Select **File, Import, App Express**.
2. Click the **down** arrow next to the Import Type field and select ISIR Data.
3. Click the **Import From** file button and select the file you want to import.
4. Choose where you want to send the report: File, Printer, or Screen. If you choose File, click the **File** button and type a name for the file.
5. Click the check boxes for the following choices:
 - **Prompt for Duplicates?**
 - **Import NSLDS data?**
 - **Identify Activated Transactions?**
 - **Compare demographic data?**
 - **Update demographic data?**
 - **Identify incoming ISIRs with existing Packaging, DL, or Pell records?**

6. Click **OK** to import the file. A progress bar will appear within an In Progress box.
7. Click **OK** to close the In Progress box.

Helpful Hints!

- Don't forget to import your correction error file (CORE04OP), if necessary. The CORE04OP file can be found under the **Import Type** field, Errors-Correction/Duplicates.
- You can check the box labeled "Identify Activated Transactions?" if you would like EDEXpress to display IDs for ISIRs which have activated transactions.

Printing Multiple Processed Correction Records

Once you have imported Correction records into EDEExpress, you can print the information. The Correction Record Print Report includes all the application information submitted by the student, as well as the computed information from the CPS.

1. With no records open, select **File, Print, App Express**.
2. Be sure that **ISIR** is displayed in the **Report** field.
3. Click **Multiple**.
4. Choose where you want to send the reports: **File, Printer, or Screen**. If you choose **File**, click the **File** button and type a name for the file.
5. If you want to use a list of Transaction IDs (trankeys) to specify which ISIRs will be printed, click the **ellipsis (...)** button in the SSN File section of the screen to enter a list of records.
 - You can select individuals or all the students in your data base by clicking the Selection Criteria button and the Select Records button.
 - You can select individual student's ISIRs using a list of Transaction Ids (trankeys) to specify which ISIRs will be printed. A Transaction ID (trankey) is the SSN + the first two letters of the last name + the transaction number.
 - Click the **ellipsis (...)** button in the SSN File section of the screen.
 - You can use a query to select students by clicking the Selection Criteria button and the Query Title **ellipsis (...)** button.
6. Click the **down** arrow next to the **Sort Order** field and select **Last Name Order** or **SSN Order**. Records are sorted first by last name, first name, and then transaction number when printing a list of processed correction records by last name.
7. If you have a transaction preference, click the **down** arrow under **Transaction Preference?** and select **Highest, Active or All** to print the active transaction number or all transactions, respectively. If there is no activated transaction, the default is the highest transaction.
8. Choose whether or not you want to **Only print records with more than 6 loans, print FAA Comments, SAR Comments, Loan Information, and/or the Certification/Signature Page** by clicking the appropriate checkboxes.
9. Click **OK**.

Importing and Receiving Electronic Error Message Classes

Rejected Batches and individual records are returned to destination points in the EDE Error Record Report format.

The EDE error records are returned for you to import in the following message classes:

- EAPR04OP - Electronic Application Rejects
- FDRE04OP - Federal Data Request Error
- CORE04OP - Corrections / Duplicates
- SIGA04OP – Signature Correction Acknowledgements & Errors
- FDRU04OP – Unfulfilled Federal Data Requests (FDRs) After 30 Days

When you import rejected files, one of two reports will follow showing a synopsis of the data you received. You may receive a batch of individual student records or an entire rejected batch.

The Detail Records Error List is generated when an individual's record(s) is rejected by the CPS and an ISIR is not produced. It displays the reason a specific record is rejected, as well as the student's transaction ID and the appropriate SAR/ISIR field number.

The Batch Number Error List is generated when a complete batch is rejected by the CPS. It provides the reason the batch is rejected and the IDs of all the students in the batch. This list will be returned to you if a batch was rejected because of an incorrect batch number.

Assumption Override Codes

Helpful Hint!

- Assumptions are edits made by EDExpress about incomplete or questionable application data. Use these codes to override assumptions for both electronic applications and corrections. When you enter conflicting data, EDExpress will show you the conflicting fields and ask you to update them. If you click OK while the situation exists, the assumption will be made unless you set the corresponding assumption override code.

Situation	Assumption Made When Override Flag Is Not present	Results Of Setting Override Before Sending Data Triggering Assumption	Assumption Overrides
The Parents' Number of Family Members does not equal the number in college. The Parents' Number of college students in the household equals 7 or more.	Parents' number in college assumed to be 1.	Allow number in college to be greater than 6.	1
Parents' AGI is blank or zero. Tax return status is filed, will file, or blank. Father's/stepfather's income from work or mother's/stepmother's income from work is positive or negative.	Parents' AGI assumed equal to the sum of the father's/stepfather's and mother's/stepmother's income earned from work.	Allow parents' AGI to be zero if blank or zero is entered.	2
The independent Student's Number of Family Members equals 3 or more. The Number of College Students in Household is the same value.	Student's number in college assumed to be 1.	Allow number of family members to be equal to the number in college when they are equal and greater than 2.	3
The student's AGI is the same as both the student and spouse earned income combined.	Student's AGI assumed to equal the sum of the student and spouse earned income portions.	Allow AGI to be zero or blank as entered.	4

Assumption Override Codes

Situation	Assumption Made When Override Flag Is Not present	Results Of Setting Override Before Sending Data Triggering Assumption	Assumption Overrides
<p>Parents' computed tax filing status equals Filed. Income from Worksheet C is greater than a fixed percentage of Parents' AGI plus Parents' Total from Worksheet A plus Worksheet B.</p> <p>Parents' computed tax filing status equals non-tax filer. Income from Worksheet C is greater than a fixed percentage of Father's/Stepfather's Income From Work, Mother's/Stepmother's Income From Work, and Parents' Total from Worksheet A plus Worksheet B.</p>	<p>Parents' income from Worksheet C assumed to be zero.</p>	<p>Allow Parents' income from Worksheet C to be greater than zero and greater than a fixed percentage of the parents' total income.</p>	<p>5</p>
<p>Students computed tax filing status equals filed. Income from Worksheet C is greater or equal to Student's AGI, and Student's Total from Worksheet A plus Worksheet B.</p> <p>Student's tax status equals non-filer. Income from Worksheet C is greater than or equal to Student's Income Earned From Work, Spouse's Income From Work, and Student's Total from Worksheet A plus Worksheet B.</p>	<p>Student's income from Worksheet C assumed to be zero.</p>	<p>Allow Student's income from Worksheet C to be greater than zero, and equal or greater than student's total income.</p>	<p>6</p>

Verifiable Reject Codes (ISIR)

Verifiable rejects are rejected data you or the student should verify are correct. You may revise these data or leave them unchanged.

Alphabetic reject codes are verifiable and numeric codes are non-verifiable.

To correct verifiable rejects, simply follow the steps listed in the Resolution column.

You can also override rejects B, N, and W by setting the corresponding reject override on page 3 of the ISIR screen.

Reject Code	Reject Reason	Resolution
A	Date of birth year equal to 1900-1928	Verify or correct the following: – Date of Birth
B	Independent student and date of birth equals 09/01/87 or greater, and date of birth is not equal to or greater than current year.	Verify or correct the following: – Date of Birth
C	Taxes paid is greater than zero and greater than or equal to 40% of the AGI, but not equal to or greater than AGI.	Verify or correct the following: – Federal Taxes Paid
D	Dependent student and father's/stepfather's SSN is not in the valid range.	Verify SSN or correct the father's/stepfather's SSN.
E	Dependent student and mother's/stepmother's SSN is not in the valid range.	Verify SSN or correct the mother's/stepmother's SSN.
N	Missing last or first name	Correct the student's last name or first name or verify a blank first or last name field if the student actually has only one name.

Verifiable Reject Codes (ISIR) (Continued)

Reject Code	Reject Reason	Resolution
P	Invalid SSN Range	Verify or correct the student's current SSN.
R	Social Security Match but no date of birth match.	Verify or correct the student's date of birth or contact the Social Security Administration for further assistance.
W	Questionable number of family members; greater than 15.	If the student is dependent, verify or correct Parents' Number of Family Members. If the student is independent, verify or correct Student's Number of Family Members.

Nonverifiable Reject Codes (ISIR)

Nonverifiable reject codes are inconsistencies that must be resolved by changing or adding information.

EDEExpress does not allow you to continue completing the correction until the inconsistency is resolved or the missing information is provided.

Reject Code	Reject Reason	Resolution
1	Simplified needs test is not met and all asset data fields are blank.	If the student is dependent, provide the following: Parents' Cash, Savings, and Checking; Parents' Real Estate/Investment Net Worth and Parents' Business/Investment Farm Net Worth. If the student is independent, provide the following: Student's Cash, Savings and Checking; Student's Real Estate/Investment Net Worth and Student's Business/Investment Farm Net Worth.
2	Incomplete FAFSA or Renewal FAFSA.	If the student is dependent, provide Parents' Taxed and Untaxed Income. If the student is independent, provide Student and Spouse (if married) Taxed and Untaxed Income.
5	Missing or invalid Date of Birth.	Correct the Date of Birth
8	SSN match with date of death	Contact FSA Customer Service at 800/433-7327. The Social Security Number (SSN) on this transaction belongs to a deceased person according to the Social Security Administration.
9	Dependent student and both Father's/Stepfather's and Mother's/Stepmother's SSN are blank.	Review and supply Father's/Stepfather's and/or Mother's/Stepmother's SSN.
10	Missing marital status and number of family members.	If the student is dependent, review and correct Parents' Marital Status and Parents' Number of Family Members. If the student is independent, review and correct Student's Marital Status and Student's Number of Family Members

Nonverifiable Reject Codes (ISIR) (Continued)

Reject Code	Reject Reason	Resolution
11	Marital status is inconsistent with reported income	<p>If the student is dependent, review and correct Parents' Marital Status plus Father's/Stepfather's Income From Work and Mother's/Stepmother's Income From Work.</p> <p>If the student is independent, review and correct Student's Marital Status plus Student's Income Earned From Work and Spouse's Income Earned From Work.</p>
12	Taxes paid is greater than zero and equal to or greater than AGI.	Correct Taxes paid or AGI.
13	Missing Name.	<p>Provide the following:</p> <p>Student's Last Name and/or Student's First Name or Verify a blank first or last name field if the student actually has only one name.</p>
14	Missing student signature on paper FAFSA or SAR.	Signature correction must be made on a printed Student Aid Report certification page and resubmitted to the FAFSA Processor or may be corrected electronically.
15	Missing parent signature on FAFSA or SAR.	Signature correction must be made on a printed Student Aid Report certification page and resubmitted to the FAFSA Processor or may be corrected electronically.
16	Missing student signature on FAFSA on the Web, Renewal FAFSA on the Web Application, or an electronic application.	Signature correction must be made on a printed Student Aid Report certification page and resubmitted to the FAFSA Processor or corrected electronically.
17	Unknown citizenship status or student is not an U.S. citizen or eligible non-citizen.	Review and verify or correct Citizenship Status.

Nonverifiable Reject Codes (ISIR) (Continued)

Reject Code	Reject Reason	Resolution
18	SSN not on Social Security Administration's database.	Correct the Social Security Number, or contact FSA Customer Service at 800/433-7327 for further assistance.
19	An EFC cannot be calculated because the Department of Education has placed a 'hold' on the student.	Student needs to call 202-377-3243 to resolve comment 009.

Bits and Bytes

Message Classes (Exchanged with CPS)

Message Class	Batch ID	Data Description	Data Sent or Received by User
CORR04OP	C	Electronic Corrections and Duplicates	Received
CORE04OP	C	Electronic Correction/Duplicate Errors	Received
CORR04IN	C	Electronic Correction/Duplicate ISIR	Sent
EAPR04OP	A	Electronic Application Rejects	Received
EAPS04IN	A	Electronic Applications	Sent
EAPS04OP	A	Electronic Application ISIRs	Received
ESFN04OP	K	State Agency Electronic ISIRs, Non Residents	Received
ESFR04OP	L	State Agency Electronic ISIRs, Residents	Received
FDRE04OP	F	Rejected FDR Request	Received
FDRF04OP	F	Processed FDRs	Received

Message Classes (Continued)

Message Class	Batch ID	Data Description	Data Sent or Received by User
FDRS04IN	F	FDR Request	Sent
FDRU04OP	F	Unfulfilled FDRs after 30 days	Received
HOLD04OP	n/a	Signature Hold File	Received
SARA04OP	E	Electronic Automatic ISIRs	Received
SIGA04OP	#S	Signature Correction Acknowledgements and Errors	Received
SIGS04IN	#S	Signature Corrections	Sent
SYSG04OP	G	System Generated	Received
YTDO04OP	I	Year-to-Date ISIRs	Received
YTDN04OP	I	ISIR Year-to-Date State Agency/Non Resident	Received
YTDR04OP	I	ISIR Year-to-Date State Resident	Received

Helpful Hints!

For record lengths, see the *EDE Technical Reference*. You may download this from the FSA Web site at FSAdownload.ed.gov

Message classes CORR04IN, CORE04OP, and CORR04OP contain correction and duplicate data.

All message classes are referenced as follows:

- 04 = Year indicator, 04 is used for 2003-2004 data.
- IN = Data YOU SEND for a Title IV contractor to retrieve.
- OP = Data YOU RETRIEVE from the Title IV contractor.

Batch IDs

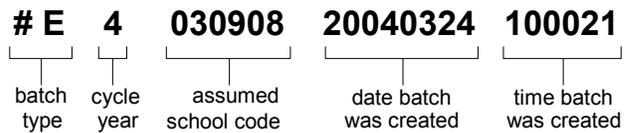
As indicated in the diagram, the first alpha character of the Batch ID identifies the type of data contained in the batch. The pound symbol (#) acts as a placeholder for the first position in one-character codes.

The single number is the cycle year to which the batch applies (for 2003-2004, this is always 4).

The next six characters identify the Federal School Code, which is the assumed institution code assigned in Setup.

The next eight digits identify the date the batch was created (in CCYYMMDD format).

The last six digits indicate the time the batch was created (in HHMMSS format).



Helpful Hint!

- See the EDEExpress Help for information about utilities, including Repairing, Compacting, and Verifying the Database, and Clearing Files and Record Locks.

Getting Help

Online Help

General help is available from the menu bar within EDEExpress. You can view the main list of help topics by selecting **Help, Help Topics, Contents** from the EDEExpress menu bar. If you are unfamiliar with using online Help within Windows applications, select **Help, Using Help**. Use the **Find** tab on the Help screen to locate specific words or phrases anywhere within the Help text. Additionally, field help is available by pressing the F1 key.

Helpful Hints!

- Expand the Help Contents books to ensure you can access all the available Help topics. Each book contains several individual Help topics.
- Check the **How Do I?** topics for frequently performed operations (select How Do I? from the Help menu).

CPS/WAN Technical Support

For questions regarding technical assistance and software functionality, call CPS/WAN Technical Support at:

800/330-5947

TDD/TYY: 800/511-5806

Customer service representatives are available 7 a.m. - 7 p.m. (CT), Monday through Friday, excluding federal holidays. You can also e-mail your inquiries to the CPS/WAN at **cpswan@ncs.com**.

Sources of Assistance for Schools

Sources of Assistance for Schools is a new document that contains helpful contact information for all Student Financial Assistance programs, including frequently called help lines, e-mail addresses, phone numbers, and Web site addresses. The document is available for downloading from the FSAdownload Web site at FSAdownload.ed.gov.

Technical References

Technical References are manuals provided to postsecondary schools and third-party servicers. These manuals include record layouts, data entry specifications, import and export formats, and print specifications that you can use to develop your own EDE system or software to interface with EDEExpress. The four technical references that are available from the FSAdownload Web site at FSAdownload.ed.gov are as follows:

1. **The EDE Technical Reference** is a compilation of record layouts, processing codes, and ISIR printing formats provided to assist EDE participants in developing their own software to interface with EDEExpress. For further assistance, call 800/330-5947.
2. **The Packaging Technical Reference** is a compilation of record layouts for adding and changing records in the Packaging module of EDEExpress.
3. **The Common Origination and Disbursement (COD) Technical Reference (Volume 5)** provides processing information and technical specifications for Full Participant Institutions transmitting the Common Record in XML to the COD System.

EExpress Updates

Downloading EExpress Updates

You can download both software and paper documents from the Internet using the FSAdownload Web site at FSAdownload.ed.gov. The SFA download Web site was created to give you access to financial aid tools for easier and more efficient use of EExpress.

Paper documentation is available to download from the Internet in both Adobe PDF and Microsoft Word format. The following types of paper documentation are available to download:

- Installation Guides
- Cover Letters
- Technical References
- Desk References

The amount of time it takes to download a file depends on the file size and the speed of your Internet connection. If you do not have a direct connection to the Internet, a 56 KB modem is recommended.