2003-2004 Desk Reference for

Packaging

U.S. Department of Education

FEDERAL
STUDENT AID

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Introduction

Preface

Financial aid packaging is the process of tracking, awarding, and managing financial aid funds or resources to students. EDExpress Packaging uses the term **award methodology.** An award methodology is a formula that determines how financial aid funds will be allocated to your students. Within EDExpress, the Package process automatically applies your school's award methodologies that you set up in the software to one or all of your students. Your students are packaged or awarded aid from the source(s) and amount(s) specified by your award methodologies and the criteria you attach to them.

EDExpress Packaging offers many benefits. You can:

- Use it as a stand-alone product or integrate it with other EDExpress modules such as Application Processing, Pell Payment, and Direct Loan.
- Import and export data. You can import data from and export data to internal 3rd Party or mainframe systems used in "tandem" with EDExpress. You may also import various data from external systems, including ISIR data from the App Express module of EDExpress. You may add new records using import external add and update records using import external change and import fund amounts.
- Create user-defined data, user-defined letters, and user-defined formulas through a global process.
- Create award methodologies that specify the criteria your students must meet to receive specific award packages.
- Set up funds and track expenditures and balances.

- Print lists and reports including a report of FISAP-eligible dependent or independent students.

  New for 2003-2004! We added a Student Summary Report that you can print out from the Print dialog box.
- (Global) Award Letters: EDExpress offers two predefined award letters: 1) an offer letter and 2) a notification letter. For each type of award letter, you can include your own text in the first text block for up to 42 lines of text. **New for 2003-2004!** Now you are able to e-mail award letters directly to students.
- (Global) Build queries based on any field in the Packaging record.
- Package, unpackage, and repackage one student record or a group of student records.
- Create multiple academic year profiles to define varying periods of enrollment for which aid is packaged (for example, terms and non-traditional calendars).

The key to successful packaging with EDExpress is to thoroughly plan and define your school guidelines. Each section of this desk reference brings you through the packaging process from setup through exporting your data. We recommend that you review the checklist provided at the beginning of the Packaging Setup section. This checklist provides at-a-glance instructions for using the software.

The 2003-2004 Packaging Desk Reference describes the basic procedures for using the Packaging module of EDExpress. It is intended to provide basic instructions and is not intended to be comprehensive. For complete instructions, see the online Help within EDExpress.

How to Download the Software and Documentation

EDExpress 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 Federal Student Aid Download (FSAdownload) Web site located at **FSAdownload.ed.gov**.

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

If you have trouble opening the FSAdownload Web site located at **FSAdownload.ed.gov** to download the EDExpress for Windows, Version 9.0 software, contact CPS/WAN Technical Support at **800/330-5947** or via e-mail at **cpswan@ncs.com** for assistance.

Important 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.

Packaging Setup

Packaging Setup Checklist

Follow the steps below before using EDExpress – Packaging. The key to successful packaging with EDExpress is to thoroughly plan and define your school guidelines.

- Set Up User-Defined Database (Optional)
- Plan Priority Order for Budget and Award Methodology Setup Codes
- Establish Queries for Budget Codes, Fund Maintenance Codes, and Award Methodology Codes
- Set Up System Parameters
- Establish Academic Year Profiles
- Enter Fund Maintenance Information
- Define Award Methodologies
- Establish Budgets
- Set Up User-Defined Formulas (Optional)
- Define SAP Values (Optional)
- Write User-Defined Text (Optional)

Important Note

Before using EDExpress-Packaging, assign your assumed school and establish security profiles under Global Setup.

Setup User-Defined Database

EDExpress allows you to add your own fields to the database. These fields display on the student's record and can be used in developing queries.

You can create up to 248 user-defined fields in your database.

To setup a user-defined database:

1. Select **Tools, Setup, Global, User Database**.

2. Click **OK**.

3. Enter the following parameters for each field you want to add to your database:

Parameter	Description
Field	Enter the name of the field. You are allowed up to 20 characters.
Type	Enter the type of data used in the field. Click the **down** arrow to display a list of types: **Date**, **Numeric** **Text** **Yes or No**
Length	Type the data length for the text field. The maximum length for this data type is 40. The remaining data types and lengths are: **Date…8** **Numeric…10** **Yes or No…1** **Text…8**
Description	Type the description of the field. The maximum length of this field is 50 characters.

4. Click **Add** if you want to add additional fields or click **OK** if you want to end this function.

Important Notes

- Plan ahead when setting up your user database.
- You **CANNOT** modify user-defined fields.
- User-defined fields are populated with data on the User Data tab, **or** by using multiple entry, **or** by using a Global external import.

Assign Priorities to Packaging Functions

Two Packaging elements have priority assignments: Award Methodology and Budgets.

Priority determines the order that EDExpress evaluates packaging elements when making assignments, starting at the element with priority closest to 1.

Packaging compares the criteria assigned to that element with the student record being processed. If the record meets the given criteria, then that element is assigned to the record and no further elements of this type are considered. If the record does not meet the criteria, EDExpress goes to the element with the next highest priority. (Priority is established highest to lowest, 1...999, A...ZZZ.)

Example:

Item	Criteria
030	Dependency Status = I
020	Dependency Status = D
015	Dependency Status = D and Housing = 2

A dependent student will be tested with Item 015 and fail. The student's record will be assigned Item 020. Since all dependent students are assigned Item 020, Item 030 will never be used.

Important Notes

- The element with the most restrictive criteria should have the priority closest to 1 so that it will be assessed first.
- The last priority should have no selection criteria and should be designed as a "fall-through" in order to catch those students whose records are missing elements considered critical by your selection criteria.
- You may want to number the priorities in increments of 5s or 10s to give you more flexibility in the future for adding subsequent priorities between the previously created priorities. For example, by establishing priorities 5, 10, 15, etc., you can easily add a priority 13 that would process between priorities 10 and 15.

Setup System Parameters

System enables a school to define the default for Packaging Entry.

To setup system parameters:

1. Select **Tools, Setup, Packaging, System**.

2. Enter the following parameters:

Parameter	Description
Total Number of Award Letters to be Printed per Student?	This field defines the number of copies of the award letters to print for each student each time award letters are printed. The default is 2.
Maximum Number of Award Letters to be Sent per Student?	This field defines the number of times an award letter can be printed for an individual student will be printed when printing globally.
Award Letter Type	This field defines which award letter type you want to print globally. **O** = Offer Letter **N** = Notification Letter
Allow Imported Pell EFC to be Modified?	This field defines whether the Pell EFC is a protected field on records that were not manually entered. Click the checkbox if you want to allow the Pell EFC field to be imported or the ISIRS to be modified.
Packaging Results Default Status	This field defines the Packaging results default status on a student record after Packaging. The two default options are: **O** = Offered **A** = Accepted
Priority Deadline Date Type	This field defines the date type you want to use as your priority deadline date when indexing for packaging process and reports. Valid priorities date types are: **A** = Application Received Date **P** = Processed Date **R** = Ready Date **U** = User Defined Date If the date type is U, the date is pulled from the User Database field.

Parameter	Description
User Defined Date Name	This field defines the name of the User Database to be used when determining which student records to include or exclude in running a process. This field is enabled only if the priority deadline date type is **U** (User Defined Date).
Use Low Tuition?	This field allows you to access the Low Tuition Tables for use in Packaging Students who qualify.
Default Housing Plans	This field defines a default value to be used for manually created records and imported ISIRs with a blank value for Housing Plans.

3. Click **OK**.

Important Note

Enter basic Packaging system information such as number of letters to be printed per student.

Establish Academic Year Profiles

The Academic Year Profile enables you to customize up to five terms, including distribution percentages for 7 types of awards.

The Academic Year Profile determines how your funds are divided.

You can create an unlimited number of Academic Year Profiles, if necessary.

Gather and enter information used to determine Academic Year Profiles for Federal Pell Grant formulas (standard term, clock-hours, etc.) and distribution percentages for aid programs.

To establish academic year profiles:

1. Select **Tools, Setup, Packaging, Academic Year Profile**.
2. If this is your first time adding an Academic Year Profile, go to Step 3 below. For all subsequent Academic Year Profiles, click **Add**.
3. Enter the following parameters:

Parameter	Description
Code	This is a four character identification code you assign to each Academic Year Profile.
Default	This field enables you to define your standard Academic Year Profile for all records when importing from the ISIR database. Each school has only one default profile. However, if the profile is not assigned to any students, you can change this field at any time.
Title	This is the 25 character description of the Academic Year Profile you have established.
Pell Grant Formula	This field is based on the school's definition of an academic year. Click the **down** arrow to view a list of valid Pell formulas: 1 – Standard-term, credit-hour programs (30 weeks) 2 – Standard-term, credit-hour programs (<30 weeks) 3 – Any term-based credit-hour programs 4 – Clock hour programs and credit-hour programs without terms 5 – Correspondence Study, non term-based program

Parameter	Description
Program Proration Percent	This field specifies the percentage of the student's program to be completed in the academic year. It applies only to: 1) Standard term credit-hour programs of less than 30 weeks, 2) Clock-hour and credit-hour programs without terms, and 3) Correspondence study non-term-based programs. Program Proration 99.99 percent equals 100.00 percent.
EFC program length to import from the ISIR database	This field sets the EFC Program Length derived from imported ISIR records.
Term	This field identifies a specific term as designated by the user. For example, Fall, Spring, Term one, Term two, etc.
Enrollment Status	Use this field to indicate the default enrollment status to package for each term you define. For example, full-time, etc.
Percentages	This field defines the percentage of an annual award to post to a given term for each of seven aid types. For example, enter 50% for Perkins % to the first term if you want 50% of the annual Perkins amount awarded in the first term. Percentages cannot exceed 100%.

4. Click **Save**.

5. Click **OK**.

Important Notes

New for 2003-2004! The Term field now allows up to nine characters.

- For clock-hour schools, use the Pell Percentage to enter your Pell weeks proration.
- For Academic Year Profile examples, click the **Help** button at the bottom of the Academic Year Profile screen. Then, click **>> AYP Setup Examples.**
- You must establish an Academic Year Profile before importing ISIRs into Packaging. (Establishing a Budget before importing ISIRs into Packaging is optional.)

Enter Fund Maintenance Information

Fund Maintenance lets you add and maintain as many aid sources as needed for packaging students. Fund Maintenance also provides you with instant information on the total funds awarded to your financial aid recipients.

To enter Fund Maintenance information:

1. Select **Tools, Setup, Packaging, Fund Maintenance**.
2. If this is your first time adding a fund, go to Step 3 below. For all subsequent funds, click **Add**.
3. Enter the following parameters:

Parameter	Description
Fund Code	This is an abbreviated identification code (up to 8 characters) you assign to identify each fund.
Fund Description	This is a full description (up to 25 characters) of the fund you have established.
Aid Type	This field identifies the type of aid associated with this fund. Click the **down** arrow for a list of valid aid types. **E** = Supplemental Education Opportunity Grant (SEOG) **F** = Federal Pell Grant **G** = Grant **R** = Grant Non-Need Based **K** = Federal Perkins loan **N** = Non-Need Based Loan (NNB) **L** = Other Need Based Loan (NB) **S** = Subsidized Loan **U** = Unsubsidized Loan (Unsub, Non-need Based) **D** = Unsubsidized Loan (Unsub, Need Based) **P** = Federal Parent Loan for Undergraduate Students (PLUS) **O** = Outside Resources **V** = Chapter 30 VA Benefits/Americorps **W** = Federal Work-Study FWS **Y** = Other Work-Study

Parameter	Description
Do not remove if unpackaged?	Click this checkbox if you want awards of this fund code to remain unmodified on a student record during the Unpackage process. If you activate this feature and repackage your students, funds MAY be awarded a second time.
Criteria	In this field, you select from queries previously established at your school to determine what group of students are eligible to receive this fund.
Beginning Balance	This field represents the beginning balance in a school's account for the upcoming year.
Adjustment to Beginning Balance	This field represents any adjustments (+ or -) to the fund.
Funds Awarded	This field reflects the current amount awarded to your eligible financial aid applicants.
Current Balance	This field represents the current outstanding fund balance remaining for a school to award. Once your current balance reaches zero, you can no longer award this fund to students (unless you enter a positive amount in the Adjustment to Beginning Balance field).
Remaining Need	Click this button to establish minimum and maximum need amounts for this fund.

4. Click **Save**.

5. Click **OK**.

Important Notes

- Make sure that the aid type you selected matches the fund you are creating; for example, F = Federal Pell Grant.

- For Fund Maintenance examples, click the **Help** button at the bottom of the screen. Then, click **>> FM Setup Examples**.

Enter Remaining Need Information

You can award a specific amount of a fund at different levels of remaining need within the packaging process (for example, if you have a school fund that is awarded for different levels, depending on the remaining need, you are able to do so with this feature).

Example:

Fund: School Need-Based Scholarship (Aid Type G)

After awarding Stafford loans (Sub/Unsub), if there is still at least $2500 or greater remaining need, you can direct Packaging to award $500. If at least $2000 to $2499 you award $300; if between $500 and $1999 you award $150.

The following aid types are excluded:

F Pell

D Unsubsidized Loan (Unsub. Non-Need Based)

O Outside Resource

V Chapter 30 VA Benefits/Americorps

You can set your Remaining Need amounts globally for each fund in the Fund Maintenance Setup by clicking the Remaining Need button or you can set (or adjust) the Remaining Need amounts for each fund in the Award Methodology by clicking the Values button in the Remaining Need column.

The Remaining Need dialog box contains the following fields:

Minimum Need Enter the minimum remaining need amount for awarding this fund.

Maximum Need Enter the maximum remaining need amount for awarding this fund.

Award Amount Enter the amount of this fund that you will award based on the Minimum and Maximum Need range.

Important Note

Note that the Minimum and Maximum Need amounts on one line should not overlap with the Minimum and Maximum Need amounts on any other line. (Remaining Need is optional for Packaging.)

Define Award Methodologies

You can establish methodologies for determining how various funds are awarded to a specific population of students.

For Award Methodology examples, click the help button at the bottom of the Award Methodology screen. Then, click >> **AM Setup Examples**.

Important Notes

- For Funds Subsidized Loans **(S)**, Unsubsidized Loans Non-need Based **(U)**, Unsubsidized Loans Need Based **(D)**, and PLUS Loans **(P)**, we recommend you leave the Max EFC as all 9s and the maximum amount as all 9s as well.
- Since the Federal Pell Grant is a calculated award, you cannot include the Pell Grant in your award methodology. EDExpress automatically awards PELL to eligible students if PELL is correctly defined in Fund Maintenance.
- Use the criteria field to identify the group of students who will be packaged using this methodology. The criteria listed were created in Query.
- You must choose whether you will enter maximum percentages or dollar amounts.

To define award methodologies:

1. Select **Tools, Setup, Packaging, Award Methodology**.
2. If this is your first time adding an award methodology, go to Step 3. For all subsequent award methodologies, click **Add**.

3. Enter the following parameters:

Parameter	Description
Code	A four character user-defined code used to identify the methodologies.
Title	This is the description (up to 50 characters) of the award methodology. It should identify which students will be packaged using this methodology.
Priority	This field prioritizes the methodology in relation to other methodologies during the packaging process. During the packaging process, EDExpress selects the highest priority methodology met by the student. Consider creating a generic methodology and give it the lowest priority (in other words, highest number) to ensure every student will be packaged regardless of the criteria used in your other methodologies.
Use Percentages or Use Dollar Amount	This field is used to indicate whether you want to use percentages or dollar amounts for the Self-Help and Gift Aid Maximum fields. Click on the appropriate radio button.
Self-Help Aid Maximum	This field identifies the maximum of need to be met with self-help aid during the packaging process. This may be a percentage or a specific dollar amount.
Gift Aid Maximum	This field identifies the maximum of need to be met with gift aid during the packaging process. This may be a percentage or a specific dollar amount.
Criteria	This field determines what methodology is applied to a student's record, using your existing queries.
Fund Code	This field represents the fund codes associated with this Award Methodology to be used during the packaging process. Click the **down** arrow for a list of available fund codes.
Fund Priority	This field indicates the order in which funds will be awarded within this Award Methodology. Funds with priority 1 are awarded first.
School Minimum	This field indicates the minimum amount awarded for this fund within this Award Methodology.

Parameter	Description
School Max	This field indicates the maximum amount awarded for this fund within this Award Methodology.
Min EFC	This field identifies the minimum EFC allowed for this fund to be packaged when using this Award Methodology.
Max EFC	This field identifies the maximum EFC allowed for this fund to be packaged when using this Award Methodology.
Remaining Need	Click the value button to view the Remaining Need values established in Fund Maintenance Setup or to establish a Remaining Need value at the Award Methodology level. You can also modify values established in Fund Maintenance.

4. Click **Save**.

5. Click **OK**.

Establish Budgets

An integral part of packaging at your school begins with assigning a budget for an applicant. In Packaging, you create customized budgets to meet your school needs.

You may create a single budget for your entire applicant population or separate budgets for subsets of your students.

For Budget examples, click the **Help** button at the bottom of the Budgets screen. Then, click >> **Budget Setup Examples**.

New for 2003-2004! When the Budget Total in the Packaging Budgets Setup is larger than 99,999 the Pell Cost of Attendance (COA) will be set to 0.

To establish budgets:

1. Select **Tools, Setup, Packaging, Budgets**.
2. If this is your first time adding a budget, go to Step 3 below. For all subsequent budgets, click **Add**.
3. Enter the following parameters:

Parameter	Description
Budget Code	This is a four character user-defined abbreviated identification code assigned to each budget. This code appears on the student's record.
Priority	This field allows you to prioritize the order in which the budget database is searched when assigning budgets. The first budget where the student meets the selection criteria is used to package that student.
Budget Total	This field is the sum of the budget component amounts you entered, and is display only.
Pell COA	This field is used to calculate Pell awards only and is modifiable at the record level and globally using Multiple Entry.
Title	This is the description of the budget. The title can be up to 50 characters.
Criteria	This field determines which budget is applied to a given student using your existing queries.

Parameter	Description
Budget Amounts	This field defines the amounts for the six budget components listed: tuition and fees, loan fees, room and board, books and supplies, transportation costs, and miscellaneous. These may be left blank.
User Defined Budget Amounts	If there are other components of the student's budget, enter the title and amount here.

4. Click **Save**.

5. Click **OK**.

Important Notes

- A budget defines the cost of attendance for a specified program in a standard academic year.

- Before packaging, a budget **MUST** be assigned to each student's record.

New for 2003-2004! You may now update the Pell Cost of Attendance (COA) field using multiple entry when the packaging status is P (Packaged), H (Hand Packaged), or M (Manually Adjusted).

Setup User-Defined Formulas (Optional)

User-Defined Formulas allow you to calculate data by adding, subtracting, multiplying, or dividing two existing fields in the EDExpress database.

For User-Defined Formulas examples, click the **Help** button at the bottom of the User-Defined Formulas screen. Then, use the **down** arrow and scroll to the User-Defined Formulas Examples.

Important Note

The calculated results from any previously created User-Defined Formula can be used as a new formula field (in the S or Student Database Table) in another User-Defined Formula.

To set up user-defined formulas:

1. Select **Tools, Setup, Packaging, User-Defined Formulas**.

2. Enter the following parameters for each formula field you want to add to your database:

Parameter	Description
Table	• Determines where the value you use in field one resides. • Enter **S** for a field from the Student Database; **F** for a field from the Fund Maintenance Database; or **U** for a field from the User Database.
Field Name	Lists all the fields that are available from the table chosen in the Database table 1 Field.
Operand	Defines the appropriate symbol for the mathematical operation you want: + Addition - Subtraction * Multiplication / Division
Table	• Determines where the value you use in field 2 resides. • Enter **S** for a field from the Student Database; **F** for a field from the Fund Maintenance Database; or **U** for a field from the User Database.
Field Name	Lists all the fields that are available from the table chosen in the Database Table 2 field.
Description	Displays the name of the field that describes the result of your formula.

3. Click **OK**.

Important Notes

- You should set up user-defined formulas PRIOR to importing records into the Packaging database.
- You can create a user-defined formula after importing records into Packaging. After importing your records, create the new formula, then select **Process, Calculate User-Defined Formulas** to apply the new formula to your records.

Define SAP Values

EDExpress allows you to track Satisfactory Academic Progress (SAP) for each of your students. SAP Values give you the ability to develop separate codes for different types of progress. For example:

S = Satisfactory progress and **U** = Unsatisfactory Progress.

For each code you establish, you have the option of preventing the record from being packaged. To prevent records from being packaged, you must add SAP values prior to the process|package.

For SAP values examples, click the **Help** button at the bottom of the SAP values screen. Then, use the **down** arrow and scroll to the SAP Values examples.

To define SAP Values:

1. Select **Tools, Setup, Packaging, SAP Values**.
2. Enter the following parameters for each SAP code:

Parameter	Description
SAP Code	This field is a 2-character alpha-numeric identifier.
No Pkg Flag	Click in this box if you want to prevent students with this code from being packaged.
SAP Description	This field is a 50-character description of the code.

3. Click **OK**.

Important Note

SAP Code listing is unlimited.

Write User-Defined Text (Global) (Optional)

EDExpress allows you to create text for award letters, document tracking, and up to five other letters that your school routinely sends to students.

- Letters can be up to one page in length.
- A heading prints on the first line of all letters unless you choose to exclude it in the Print box; it does not appear in the text entry box.
- The student's name and address appear on the upper left side of all letters.
- Your school's name and address, as well as the student ID, appear on the upper right side of all letters.
- The salutation "Dear Student" appears flush left below the address and student ID in the award letter. **New for 2003-2004!** You can now use just a first name or use a full name.
- The text entry box is a simple text editor. The text automatically wraps to the next line as you type, and you can use hard returns. Do **not** use tabs.

Note: Letters are formatted so that when the letter is folded, the student's address appears in the window of a #10 window envelope.

To write user-defined text:

1. Select **Tools, Setup, Global, User-Defined Text**.
2. Click on the appropriate item to create text for an award letter, document tracking letter, or user letters 1 through 5.
3. Enter your text.
4. Click **OK**.

New for 2003-2004! Using the new "print to-email" function, you can now e-mail student-based letters as an attachment.

Important Notes

- For award letters, you can enter up to 40 lines of text; for document tracking letters, up to 12 lines of text; and for user-defined letters, up to 42 lines of text. User-Defined Text is a Global function.
- If you are creating award letter text, leave the first line of the text entry window blank.

Query

Rules for Queries

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 records in the database. Some queries have fixed values, or you can enter different values each time you use the query.

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 Hint!

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 and **View Query dialog box**

Creating a Query

To create 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 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.

   Tip: If you want to be prompted for a value at the time you use the query, do not specify a value for the query statement. Instead, click the **Prompt at Execution** checkbox. However, do not use the **Prompt at Execution** feature for Packaging Setup–**Prompt at Execution** queries cannot be used with Packaging setup.

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 pip symbol (|) and apostrophe (').

Creating a Query from a Predefined Query

EDExpress comes with a set of predefined queries commonly used in Global, App Express, Packaging, Direct Loan, and Pell.

Wherever the Selection Criteria option is available in EDExpress, you can use these queries to identify groups of records. See Using a Query in this desk reference for more information.

You can also use predefined queries as templates to create your own queries.

To create 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.

Important Note

For more information, click **Help Topics, Index** from the EDExpress Main Menu and search for the topic, **Query dialog box**.

Modifying a Query

To modify 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 Query for the First Time

When you open Query for the first time, you'll see that the predefined queries are stored as the first set of records in the Query database.

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

Important Notes

- Use the Query function to create queries that are most useful to your school and the way you process data.
- Parameterized (Prompt at Execution) queries cannot be used with Packaging setup (for example, Fund Maintenance and Award Methodology).
- For more information, click **Help Topics, Index** and search for these topics:
  - Query Grid dialog box
  - Parameter Query Entry dialog box
  - View Query dialog box
  - Parameterized
- (Prompt at Execution) queries **cannot** be used with Packaging setup.

Using A Query

You can use queries in any function where you see a Selection Criteria button; for example, Printing Lists, Importing ISIR Data, Exporting Packaging Data, Multiple Entry, and the Package, Unpackage, and Repackage processes.

Choose the **function** you want to use in the table below and follow the steps listed for accessing that function (**How to get there…**). As you complete the information requested on the screen, refer to the steps listed below for using a query:

Function	How to get there…
Printing Lists and Packaging Records	Select **File, Print, Packaging**, and one of the following lists: • List – Students by Fund Code, • List – Packaged Students, • List – Unpackaged Students, • List – Entered Packaging Records, or • Packaging Record (Multiple)
Importing ISIR Data	Select **File, Import, Packaging, Packaging Data-ISIR Data**.
Exporting Packaging Data	Select **File, Export, Packaging, Packaging Data**.
Multiple Entry	Select **Process, Multiple Entry, Packaging**.
Package, Unpackage, and Repackage Processes	Select **Process** and one of the following processes: • **Package** • **Unpackage** • **Repackage**

To use a query:

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 box displays.

3. Click on the query you want to use to select it.

    - If the Parameter Query column is not checked, click **OK**. EDExpress returns you to the Selection Criteria 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**. EDExpress returns you to the Selection Criteria box and enters the title of the query in the Query Title field. Click **OK** again and the Parameter Query Entry box displays.

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, EDExpress 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.

Important Notes

- For more information, click **Help Topics, Index** and search for these topics:
  - Query Grid dialog box
  - Parameter Query Entry dialog box
  - View Query dialog box
  - Parameterized
- (Prompt at Execution) queries **cannot** be used with Packaging setup.

Sample Queries

Here are three examples of queries that you can use in processing your students' financial aid data.

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.

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

Sample 2

Unpackaged graduate students under 2000 EFC.

(EFC-PACKAGING< 2000) AND
(COLLEGE GRADE LEVEL-PACKAGING > = "6") AND
((PACKAGING STATUS = "N") OR
(PACKAGING STATUS = "U"))

Sample 3

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

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

Deleting A Query

To delete a query:

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

   EDExpress asks you to confirm that you want to delete the query.

5. Click **Yes** to delete the query.
6. Click **OK** to continue.

Important Note

For more information, click **Help Topics, Index** and search for the topic, **Query dialog box**.

Creating Packaging Records

Packaging Entry

There are three types of entry modes you can use to establish a packaging record:

- **Manually** enter data from a printed document (for example, SAR, ISIR, and paper FAFSA).
- **Import ISIR data** from the Application Processing module of EDExpress.
- **Import records** from your school system using the "Import External Add" option.

Important Note

You must follow the record layouts found in the Packaging Technical Reference guide located on the FSAdownload Web site located at **FSAdownload.ed.gov** or you can print them from EDExpress.

To print record layouts from EDExpress:

1. Select **File, Print, Packaging** from the main menu.
2. Select **Record Layout–Import External Add** as your report type.

Manual Entry

EDExpress provides you flexibility in establishing a student's financial record through manual entry. If a student does not already have a demographic record in the database, perform the steps listed below.

To use manual entry:

1. Select **File, New**.
2. Enter **SSN**.
3. Enter **Demo record**.
4. Click **Save**.
5. Click the **Awards** Tab.
6. Complete the student's packaging record. Press the **F1** key to get help in completing each field.
7. To save the Award record, click **File, Save**.
8. To return to the Main Menu, click **File, Close**.

Important Notes

- If a demo record already exists for the student, click **File, Open**.
- Make sure the correct Dependency Status appears on the Demo tab. Packaging awards funds, in part, are based on this field.

Importing ISIRs

EDExpress provides you the flexibility to establish a student's financial record simply by importing the student's data from the EDExpress database.

The ISIR you import will be the active transaction. See online help for more information.

To import ISIRs:

1. Select **File, Import, Packaging, Packaging Data–ISIR Data**.
2. Enter the following parameters:

Parameter	Description
Report to	This option enables you to view, print, or send the output document to a file to be retained at your school. The output document shows processing results.
Academic Year Profile	This is the profile assigned to each record during the import ISIR process. Click the ellipsis button to display and select from a list of codes.
Selection Criteria	This option enables you to narrow down the selection of students during the import process.
Add Budgets?	This option enables you to automatically assign budgets to the students upon import.
Print a List of Imported Packaging Records?	This option enables you to print a listing of records added during the Import ISIR process.

3. Click **OK**.

Important Notes

- To avoid packaging a student's record in error, EDExpress will not import a rejected ISIR from the EDExpress database.
- You must have at least one **Academic Year Profile** code defined to import ISIRs. You should also have your budget code in Setup completed.
- If you import large numbers of ISIRs into Packaging, you may want to consider assigning your budgets at a later time in order to speed up the import process.

Import External

EDExpress provides you the flexibility to establish a student's financial record simply by importing records from your external school system.

To import external records from your school system:

1. Select **File, Import, Packaging**.

2. Click the **down** arrow next to Import Type, then click **Packaging Data–External Add**, **Packaging Data–External Change**, or **Packaging Data–Add Fund Amounts**.

Parameter	Description
Add	This option enables you to add packaging records to the Packaging database.
Change	This option enables you to modify specific fields on an existing packaging record on the Packaging database.
Add Fund Amounts	This option allows you to update Fund awards on a student record by importing from an external file.
Report to	This option enables you to view, print, or send the output document to a file to be retained at your school.
Prompt for Duplicates?	This option allows you to receive a prompt for each duplicate record encountered. (This is for External Add only.)
Print a list of Imported Packaging Records?	This option enables you to print a listing of records added during the Import External process.
Print Successfully Imported Funds?	This option enables you to print successfully imported funds. Enable this checkbox to print the Funds Imported Report upon completion of the import process.

3. Click **OK**.

Important Notes

- To use Import External Add or Change, you must first create an input file according to the specifications provided in the Packaging Technical Reference.

- EDExpress also lets you create an external Packaging data export file. For information and instructions, see the topic *Export Packaging Data* in the online help.

Packaging, Unpackaging, and Repackaging Processes

Packaging Process

The Packaging process enables you to create a student financial aid package for a student or a group of students in your Packaging database. EDExpress enables you to package students' records in two different modes:

- **Individual—**This mode enables you to retrieve a student's record and perform the packaging process for that specific student only.

  The student's record must be open to use this software feature. Individual packaging is done from the **Awards** tab or globally using **Process|Packaging|Selection Criteria.**

- **Batch—**This mode enables you to Package a group of students via the Process, Package, Selection Criteria feature from the main menu. You can also use the Sort By option to sort the records you selected to package.

  Batch packaging is done via **Process, Package** from the main menu. When the batch process is complete, EDExpress asks if you would like to print a list of packaged students. The list includes the student's name and Social Security Number (SSN).

Individual

From the Main Menu while in an individual student record:

1. Select **File, Open**.
2. Enter the student's SSN.
3. Click **OK**.
4. Click the student's Award Tab.
5. Click **Process, Package**.

Batch

From the Main Menu:

1. Select **Process, Package**.
2. Use Selection Criteria to specify a group of students to package.
3. Use the Sort By option to prioritize the students in your selected group. Click **Help** for more information.
4. Click **OK**.

Important Note

Note the Current Packaging Status field in the upper right corner of the screen:

H = Hand Packaged

M = Manually Adjusted Package

N = Not Ready to Package

P = Packaged

R = Ready to Package

U = Unpackaged

Unpackaging Process

The Unpackage process reverses the Packaging process. EDExpress enables you to unpackage students' records in two different modes:

- **Individual—**Enables you to retrieve a student record and perform the unpackaging process for the specific student only.
- **Batch—** Batch unpackaging is done via **Process, Unpackage** from the main menu. This feature enables you to use Selection Criteria to choose a group of students' records to unpackage. You can also use the Sort By option to sort the records you selected to unpackage.

The unpackage process performs these actions:

- Returns all monies to the funds they originated from in Fund Maintenance, except for the funds awarded as Outside Resources, Aid Type O. These funds (which are often awarded by Hand) remain awarded to the student and are not returned to Fund Maintenance.
- Changes the packaging status to U.

Individual

From the Main Menu while in an individual student record:

1. Select **File, Open**.
2. Enter the student's **SSN**.
3. Click **OK**.
4. Click on the Award Tab.
5. Click **Process, Unpackage**.

Important Note

You can also use this feature from the main menu without opening a student record.

Batch

From the Main Menu:

1. Select **Process, Unpackage**.

2. Use Selection Criteria to specify a group of students to unpackage.

3. Use the Sort By option to prioritize the students in your selected group. Click **Help** for more information.

4. Click **OK**.

Important Notes

- Unpackage returns awarded funds to the fund accounts you established in Fund Maintenance. Please note awarded funds that have been marked "Do Not Remove if Unpackaged" will be retained on the student record.

- Do not use Selection Criteria if you want to unpackage all of your packaged records.

- After unpackaging a student, the status flag is changed from **P** (packaged), **H** = (Hand Packaged), or **M** = (Manually Adjusted Package,) to **U** = (Unpackaged).

Repackaging Process

The Repackage process recomputes the entire financial aid package of individual students or groups of students based on changes to their demographic information, financial data, award methodology, or fund parameters. EDExpress enables you to repackage students' records in two different modes:

- **Individual**—Enables you to retrieve a student record and perform the repackaging process for the specific student only. The student's record must be open to use this software feature.
- **Batch—**Enables you to use selection criteria to choose a group of students' records to repackage. You can also use the Sort By option to sort the records you selected to repackage. Batch repackaging is done via **Process, Repackage** from the main menu.

Individual

From the Main Menu while in an individual student record:

1. Select **File, Open**.
2. Enter the student's **SSN**.
3. Click **OK**.
4. Click on the **Award Tab, Process, Repackage**.

Batch

From the Main Menu:

1. Select **Process, Repackage**.
2. Use Selection Criteria to specify a group of students to repackage.
3. Use the Sort By option to prioritize the students in your selected group. Click **Help** for more information.
4. Click **OK**.

Important Note

Packaging status must be equal to one of these in order to repackage records:

P = (Packaged),

H = (Hand Packaged), or

M = (Manually Adjusted Package).

Printing Reports

Print Award Letters

EDExpress allows you to print two types of award letters:

- **Financial Aid Award Offer**: Students need to return this letter to the Financial Aid Office if they want to accept the award. Students need to return this letter to the Financial Aid Office if they want to accept art of all of the award.
- **Financial Aid Award Notification**: Students do not need to return this letter to the financial aid office if they accept the total award. This letter gives the student the option to decline part or all of the award.

Award Letters can be printed for a single student or a group of students.

To print award letters:

1. Select **File, Print, Packaging**.
2. For Report, click the **down** arrow key and select **Letters–Award**.
3. Click the **Single** radio button to print a letter for a single student; click the **Multiple** radio button to print a letter for a group of students. If the **Exclude Records with Award Letter Received?** box is checked, then the Award Letter will not print during Batch Print. If you print to the screen, this action does not affect your letter count.
4. Click **Printer**, **File**, **Screen, or E-mail** as the output destination. If you want to send the report to a file, click the **File** button to locate and name the file, then click **OK**. EDExpress automatically enters the filename in the text box.

   New for 2003-2004! You will now be able to e-mail award letters directly to students.

5. Enter the following parameters:

Parameter	Description
Enter SSN	(Single option only) Enter the SSN of the student who will be receiving the letter.
Address	Click on the **down** arrow and specify the address you want to use. Information is lifted from the DEMO tab.
Sort Order	(Multiple only) Click on the **down** arrow and specify the order that the letters will print (Required). Sort order options are **Last Name**, **SSN**, or **Zip Code**.
Acceptance Date (Offer Letter)	Enter the date you want the student to respond to the award package. This date prints on the award letter. The Acceptance Date is not available for Notification Letters (this option will be grayed out on the screen), but is required for Offer Letters.
Exclude Heading from Letter?	Click this box to exclude the heading “Financial Aid Award Notification XXXX-XX Award Year” from the award letter.
Exclude Records with Award Letter Received?	(Multiple option only) Click this box to prevent award letters printing that have already been marked as received.
Exclude Needs Analysis?	Click this box to exclude the need analysis detail from the award letter.
Print User Defined Text?	Click this box to print the text you set up in the User-Defined Text area of the software.
Print Missing Documents?	Click this box to print a list of requested documents missing or incomplete from the student’s file.
Exclude Signature?	Click this box to not print the signature block on the award letter.
Print School Name/Address?	This option is marked by the system as a default. By clicking on this checkbox (or unmarking) you are indicating you <u>do not</u> want the school's name and address to print on the Award Letter.

6. Click the **Selection Criteria** button (multiple option only) if you want to narrow the number of records you want to work with.

7. Click **OK**.

Important Notes

- An Award Letter can also be printed from a student's **Awards** tab by going to **File, Print**.

- You can also print Document Tracking Letters and Labels via **File, Print, Global** from the main menu.

Print FISAP-Eligible Dependent/Independent Students

This option enables you to print a detailed page of student information including the student's FISAP income range. Also, you can print a report displaying the distribution of all eligible dependent or eligible independent students by income range in your Packaging database. This report is helpful when preparing Part II, Section F of the FISAP.

To print FISAP-eligible dependent/independent student information:

1. Select **File, Print, Packaging**.

2. For Report, click the **down** arrow and select FISAP-Eligible Dependent Students or FISAP-Eligible Independent Students.

3. Click **Printer**, **File**, or **Screen** as the output destination. If you want to send the report to a file, click the **File** button to locate and name the file, then click **OK**. EDExpress automatically enters the filename in the text box.

4. Click **Print Detail?** for a student-by-student listing of records included in the FISAP summary report.

5. Click **OK**.

Important Notes

- The FISAP is the Fiscal Operations Report and Application to Participate for Funds (FISAP).
- For further information on completing the FISAP, see the FISAP Form and Instructions located on the Information for Financial Aid Professionals (IFAP) Web site at **ifap.ed.gov**.
- If you package a student but the student does not attend your school, delete that student's packaging record so that the student does not appear on the FISAP grid in EDExpress.

Print Lists

This option enables you to print a variety of lists and other items. These include:

Lists

- List–Fund Maintenance
- List–Students by Fund Code
- List–Packaged Students
- List–Unpackaged Students
- List–Entered Packaging Records
- List–Packaging Setup
- List–Funds Forecast

Other Items

- Packaging Record
- Measurement Tools–Funds
- Record Layout–User Defined Formats
- Student Summary **(New for 2003-2004!)**

To print these items:

1. Select **File, Print, Packaging**.
2. For Report, click the **down** arrow and select the item that you want to print.
3. Click **Printer**, **File**, or **Screen** as the output destination. If you want to send the report to a file, click the **File** button to locate and name the file, then click **OK**. EDExpress automatically enters the filename in the text box.
4. Depending on the item you selected, click on the remaining options that are available to you on the screen.
5. (Optional) Click the **Selection Criteria** button to select specific records or to use a query to select a group of records.
6. Click **OK**.

Important Notes

- If you print to a file, no hard copy prints on your printer. To print a hard copy, repeat the print process and select **Printer** as your output destination.
- If you chose **Screen** as your output destination, use the **scroll bars** to view and click **OK** when you've finished.
- For more information and instructions, see the topic *Printing Reports in Packaging* in the online help.

Exporting Packaging Data

Packaging Export

EDExpress provides you the flexibility to export Packaging data to an external system.

To export Packaging data, follow these simple steps:

1. Close any records that are open.
2. Select **File, Export** from the menu bar.
3. Click **Packaging**.
4. Confirm that Packaging Data appears in the **Export Type** box.
5. Confirm that the default filename and data directory you established in Setup appears in the **Export To** box. Or, if you want to export to a different filename, click the **File** button to locate and name the file, then click **OK**. EDExpress enters the filename in the text box automatically.
6. Select the **export status** by clicking the **down** arrow.
7. Select the **delimiter type** by clicking the **down** arrow.
8. Type the **format code** in the Format Code box. Or, click the **ellipsis (...)** button to select from a list of format codes.

9. **(optional)** Click the **Selection Criteria** button to narrow the group of records you want to export. When you are finished, click **OK**.

10. Click **OK** to export the data. EDExpress exports the file to the file shown in the Export To box and an export statistics box appears.

11. Click **OK** to close the export statistics box.

Important Notes

- In order to use the Export feature in Packaging, you must establish a file format. See the *File Format* topic in the EDExpress online help for more information.

- The export message class is **PKEX04IN.***.

Getting Help

Types of Help

Online Help

Instead of a paper user's guide, EDExpress has online Help. General help is available from the menu bar and field help is available by pressing the F1 key. See the "Using Help" topic in the online Help for more information.

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

or e-mail CPS/WAN Technical Support 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 located at **FSAdownload.ed.gov** under References and Documentation.