2004-2005 Desk Reference for

EDExpress for Windows Release 1.0

Setup

Application Processing

Packaging

FEDERAL STUDENT AID

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Introduction to EDExpress for Windows

Using EDExpress for Windows 2004-2005, Release 1.0

To use EDExpress, you must install the App Express (application processing) module. Global functionality is installed automatically.

With the App Express module, you can import, review, and print Institutional Student Information Records (ISIRs) sent to you by the Central Processing System (CPS). ISIRs are generated when:

- Students file their Free Application for Federal Student Aid (FAFSAs)
- Students correct their Student Aid Report (SARs)
- You fill out FAFSAs for students using FAA Access to CPS Online
- You make corrections to student records online
- The CPS creates new ISIRs based on changes to student eligibility ("pushed ISIRs")

The FAFSA and Student Inquiry (formerly SAR/ISIR) tabs in the App Express module are now linked directly to the FAA Access to CPS Online Web site. Exporting and transmitting FAFSA or ISIR correction data to the CPS through the SAIG is no longer necessary—you enter and submit data through the Web interface directly to the CPS.

Installation of the Packaging module is optional. With the Packaging module, you can track, award, and manage federal student aid funds.

Purpose of this Desk Reference

This desk reference provides basic instructions for using the App Express and Packaging modules of EDExpress, but it is not intended to be comprehensive. For additional information, see the online Help within EDExpress.

Setting Up EDExpress

Logging In for the First Time

When you start EDExpress for the first time, the Startup Information dialog box appears with an alert that your assumed school is not defined. After you have defined your assumed school code in Global Setup, this alert no longer appears.

To log in to EDExpress for the first time:

1. Select **Start**, **Programs**, **EDESuite**, **EDExpress 2004-2005** and choose **EDExpress for Windows 2004-2005**.

2. If you see the Startup Information dialog box, click **Close**.

3. Type **SYSADMIN** for the user ID. Until you create a user ID for yourself or user IDs for others in your office, SYSADMIN is the default user ID.

4. Type **SYSADMIN** for the password.

5. Type a new password in the New Password box. You must change the SYSADMIN password the first time you log in to the software. The new password becomes the password for the SYSADMIN user ID.

   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. Type the new password again in the Verify Password field.

7. Click **OK** or press **Enter** to log in to EDExpress. The Prior Year Move dialog box appears, offering you an opportunity to import your prior year setup data.

8. If you want to import Global, Application Processing, or Packaging data from the 2003-2004 EDExpress database, click **Yes** to the Import Prior Year Data? prompt.

   If you do not want to import Prior Year Data, or are not sure, click **No**. You can import Prior Year Data at any time by selecting **File, Import**, **Global**, choosing **Prior Year User-Defined Queries**, **Setup and File Formats** as the import type, clicking **OK**, and selecting the data you want to import. See "Prior Year Import" in this desk reference for more information.

Prior Year Import

When you log in to EDExpress for Windows 2004-2005 for the first time, you are prompted to import Prior Year Queries, Setup and File Formats from the EDExpress for Windows 2003-2004 database. If you do not import prior year data when you log in for the first time, you can import it later by following the steps below.

New for 2004-2005! You can now import any file formats you created for the App Express or Packaging modules in EDExpress for Windows 2003-2004 as part of the prior year import.

The following data can be imported using Prior Year User-Defined Queries, Setup and File Formats:

Query

- Global
- App Express
- Packaging

Note: Parameter queries using specific dates, such as "PACKAGED DATE = 20031002," and queries containing fields that do not exist in EDExpress for Windows 2004-2005 are not imported when you import prior-year queries.

Global Setup

- Security Groups

Note: Security group access rights are not transferred when you import prior year Security Groups. You must reassign access rights to imported groups in Security Groups setup.

- Security Users
- Document Tracking
- User-Defined Letter Text
- System
- File Management

Note: Import and Export file paths for new 2004-2005 message classes are not changed when you import prior year File Management. If you want the import and export paths to be different than the default C:\IAM\DATA for new message classes, you must change the paths in File Management setup.

- User Database

Application Processing Setup

- System
- File Formats

Note: If a file format with the same code already exists in EDExpress for Windows 2004-2005, the file format is not imported.

Packaging Setup

- Academic Year Profiles
- Fund Maintenance
- Award Methodologies
- Budgets
- File Formats

Note: If a file format with the same code already exists in EDExpress for Windows 2004-2005, the file format is not imported.

- SAP Values
- System
- User-Defined Formulas

To import prior year data:

1. Select **File**, **Import** from the menu bar, then choose the **Global** tab.
2. Confirm that **Prior Year User-Defined Queries**, **Setup and File Formats** appears as the Import Type.
3. Select **Printer**, **File**, or **Screen** as the output destination. If you want to send the report to a file, click the **File** button and name the file.
4. Click **OK**. The Prior Year Move dialog box appears.
5. Select the items you do not want to import by clearing the boxes in the Import column.
6. Select one of the following import options:
   - **Import All records for Setup Options Selected** imports all records without prompting you to select specific records.
   - **Import only Specific records for Setup Options Selected** prompts you to select the specific records you want to import for each group of records, such as Security Groups and Award Methodologies.

7. Click **OK**.

   If you chose Import All records for Setup Options Selected, the In Progress dialog box appears.

   If you chose Import only Specific records for Setup Options Selected, you must select the specific records you want to import for each group of records before the In Progress dialog box appears.

8. Click **OK** to close the In Progress dialog box.

9. If you selected Print as the output destination, click **OK** to print the Import Prior Year Queries, Setup and File Formats report.

Global Setup

Defining Security

Creating security groups is optional. If you do not need to limit access to EDExpress, you can create user IDs and assign them to the predefined EXPRESS ADMINISTRATION security group, which has access to all EDExpress functions.

If you need to restrict access to some of the functions within EDExpress for certain users, the first step is to establish *groups* that have limited access to EDExpress. The second step is to create *user IDs* and assign them to the groups you have created to specify which functions the users can access.

New for 2004-2005! The Browse Only (Tabs)? option for Security Groups has been modified to enable access to all buttons and dialog boxes on each tab.

To create a security group:

1. Select **Tools**, **Setup** from the menu bar, then choose **Global**, **Security Groups**.
2. Click **Add**.
3. Type the name of the group you are defining.
4. Select the **Browse Only (Tabs)?** checkbox if you want the group's access to individual student records (tabs) to be read-only. Access to other functions, such as importing, exporting, and using Multiple Entry, can be limited by clearing the Access checkboxes for these functions.
5. (optional) In the Password Timeout box, type the number of days a group member's password is valid. If you do not want the group members' passwords to expire, leave the value at 0.
6. Click the tab for the module for which you are defining security. The security options change depending on the tab you select.

7. Select the checkboxes in the Access column to enable or disable the functions to which the group will have access. If the function's checkbox is selected, the function is enabled. For example, if you want users in a group to have access to Global setup options, click the **Global** tab, scroll down to the checkbox for Setup in the Tools group, and select the checkbox to enable access.

8. Click **Save** to add the group to the database.

9. (optional) Repeat steps 2 through 8 to add more groups.

10. Click **OK** to return to the EDExpress main screen.

To create users:

1. Select **Tools**, **Setup** from the menu bar, then choose **Global**, **Security Users**.

2. Click **Add** (below the new record count box). If this is your first record to add after installing EDExpress, skip this step and go to step 3.

3. Type a user ID in the User ID entry box and press **Tab**.

4. Click the **down** arrow to view a list of available security groups and select a group name. The security settings for this group are applied to the user ID you are creating.

5. (optional) Select the **Export to EDconnect?** checkbox to export Direct Loan and Pell records to the EDconnect transmission queue automatically.

6. Press **Tab** to advance to the Password field.

7. Type the password for the user in the Password box and press **Tab**.

8. Type the password again in the Verify Password box.

9. Confirm that the password date is correct. If it is not, click the **Calendar** button next to the Password Date box. A calendar appears. Double-click the correct date.

10. Click **Save** to add the user to the database.

11. (optional) Repeat steps 2 through 10 to add more user IDs.

12. Click **OK** to return to the EDExpress main screen.

Helpful Hint!

- You can also change passwords in the Security Users dialog box. See online Help for instructions on changing passwords.

School Setup

To define an assumed school:

1. Select **Tools**, **Setup** from the menu bar, then choose **Global**, **School**.

2. If you see the message "No Assumed School," click **OK**.

3. Click **Retrieve...** (above the **Help** button in the lower portion of the dialog box) to view the school list. Right-click on any column heading to view a menu of sorting functions to help you locate your school. You can also use the **scroll bars** to view the list.

4. Click your school's name and click **OK**. If the Federal School Code that now appears in the School Code field is the one you want for your assumed school, select the **Assumed School** checkbox. Verify that the information about your school is correct, and make changes if necessary.

5. Select the **App Processing Participant** checkbox if you will be processing applications.

6. Click **OK** to continue.

7. Click **Yes** to save.

Important Note

- If you are a Direct Loan school and have both an application processing school code and a DL code, be sure to use your application processing school code as the assumed school.

New for 2004-2005! The length of the Federal School Code name in the Federal School Code file has been increased from 35 to 40 characters. The school name prints on award letters, document tracking letters, and user-defined letters.

Global System Setup

To set up Global System options:

1. Select **Tools**, **Setup** from the menu bar, then choose **Global**, **System**.

2. Select the **Allow notepad entries to be edited?** checkbox if you want EDExpress users to create and edit notepad entries. If you clear this checkbox, users will be able to view Notes entries, but will not be able to create them.

3. Click the **down** arrow to select the default system (Global, App Express, or Packaging) to display when you are printing, importing, exporting, deleting, creating queries, and creating file formats.

   New for 2004-2005! In Global System setup, you can choose the system tab to display first (Global, App Express, Packaging, Direct Loan, or Pell) when you import, export, or print. For 2004-2005, the Security Groups dialog box also displays the default system you select in Global System setup.

4. Type the number of days that you want to elapse before EDExpress automatically reprints another document tracking letter for document codes that have not been marked as received when you print letters again.

5. Type the number of times you want to reprint document tracking letters for each student.

6. Type the number of document tracking letters you want to print for each student each time you print these letters.

7. Select the **Return to Dialog** checkbox if you want to return to the Print, Import, or Export dialog boxes after printing a report, importing data, or exporting data.

8. Select **Single** if you usually print a single record at a time, or select **Multiple** if you usually print multiple records at a time. This is your default setting, but you can change it for specific print jobs in the Print dialog box.

9. Select **Printer**, **File**, **Screen**, or **E-mail** as the default report file destination.

10. Click **OK** to continue.

11. Click **Yes** to save.

Certain system options can be defined for individual users. Options that cannot be selected for individual users are disabled.

To set up Global System parameters for an individual user ID:

1. Select **Tools**, **Setup** from the menu bar, then choose **Global**, **System**.

2. Click the **Add** button in the lower portion of the dialog box.

3. Click the **ellipsis (…)** button to the right of the User ID box in the upper portion of the dialog box and select a user ID from the list of users.

4. Click the **down** arrow to select the default system (Global, App Express, or Packaging) to display when the user prints, imports, exports, deletes, creates queries, and creates file formats.

5. Select the **Return to Dialog** checkbox if the user wants to return to the Print, Import, or Export dialog boxes after printing a report, importing data, or exporting data.

6. Select **Single** if the user usually prints a single record at a time, or select **Multiple** if the user usually prints multiple records at a time. This is the default setting, but the user can change it for specific print jobs in the Print dialog box.

7. Select **Printer**, **File**, **Screen**, or **E-mail** as the default report file destination.

8. Click **OK** to continue.

9. Click **Yes** to save.

App Express System Setup

To set up App Express System options that will be used when you import records:

1. Select **Tools**, **Setup** from the menu bar, then choose **App Express**, **System**.

2. Clear the **Update Demographic Data?** checkbox if you do not want EDExpress to update demographic records when you import ISIRs. EDExpress automatically updates the fields on a student's demographic record (Demo tab) when you import a higher transaction than the one currently in the EDExpress database. **Note**: Under normal circumstances, you should allow EDExpress to update demographic data.

   Leave the **Update Demographic Data?** checkbox selected if you want EDExpress to update the fields on the student's Demo tab when you import ISIRs. The demographic fields are updated only when a higher transaction number is imported.

3. Select the **Compare Demographic Data?** checkbox if you want EDExpress to print a list of changes made to demo records during the ISIR import process as part of the Import Records Edit Report.

4. Click **OK** to continue.

5. Click **Yes** to save.

FAA Access Setup

If you are the destination point administrator (DPA) of the TG number used for CPS processing, or if the DPA has enrolled you for FAA Access to CPS Online, you can enter your FAA Access user information in the FAA Access dialog box. Although FAA Access setup is optional, you will not have to enter your personal identifiers (except your PIN) each time you create, correct, or view student records if you set up FAA Access.

1. Select **Tools**, **Setup** from the menu bar, then choose **Global**, **FAA Access**.

2. Type your Social Security Number in the FAA Social Security Number field.

3. Type the first two characters of your last name in the FAA Name ID field.

4. Type your date of birth in the FAA Date of Birth field.

5. Type the TG number you use for FAA Access to CPS Online in the TG# field.

6. Type your Federal School Code, if it is not already filled in for you, in the School Code field. Or, click the **ellipsis (…)** button to select your school code from the list of codes.

7. (optional) Type a password for saving and restoring applications and corrections in the Application Save/Restore Password field.

8. Click **OK** to continue.

9. Click **Yes** to save.

Important Note

- FAA Access setup is disabled for the SYSADMIN user ID, so be sure to log in with a user ID other than SYSADMIN if you want to set up FAA Access for a specific user. Although you can use FAA Access to CPS Online when logged in with SYSADMIN, EDExpress does not allow you to store FAA Access user information for the SYSADMIN user ID.

- You can set up FAA Access only for the user ID with which you logged in, so be sure to log in with your own user ID before setting up FAA Access.

- When you enter the FAA Social Security Number, FAA Name ID, and FAA Date of Birth, the characters you enter appear as normal characters when you type them in the boxes. If you close the dialog box and return to it, however, only asterisks appear in the fields. You can edit the information in the fields, and the characters you enter appear as normal characters as you type them, but each time you return to the dialog box after you have closed it, only asterisks appear. This keeps your personal identifiers private.

Importing and Printing ISIRs

Importing Data into EDExpress

Within three business days of entering FAFSA application data or ISIR corrections on the FAA Access to CPS Online Web site, the corresponding ISIRs are available for you to retrieve from your Student Aid Internet Gateway (SAIG) mailbox. See the EDconnect online Help or the *SAIG Desk Reference for EDconnect* at the U.S. Department of Education's Federal Student Aid Download (FSAdownload) Web site located at **fsadownload.ed.gov** for more information. You must import the data into EDExpress to review the ISIRs.

To import ISIRs into EDExpress:

1. Select **File**, **Import** from the menu bar, then choose **App Express**.

2. Confirm that **ISIR Data** appears in the Import Type box. If not, click the **down** arrow and select **ISIR Data**.

3. Click the **File** button in the Import From section of the screen and select the file you want to import.

4. Click **OK**.

5. 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.

6. Click **OK** to import the file. A progress bar appears within the In Progress box.

7. Click **OK** to close the In Progress box when the import is finished.

Important Notes

- When you import ISIRs and select the Identify Activated Transactions? checkbox, the EFC of the active transaction and the EFC of the incoming ISIR appear on the Import Records 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, in the Import Type box.

- When a new ISIR is imported into EDExpress, the Import Records Edit Report displays the "HAS FLAG" for Packaging, Direct Loan, and Pell if a record exists in those modules for the student.

New for 2004-2005! When an assumption has been made on an ISIR, a notation is displayed on the ISIR Review tab alerting you to the assumption and referring you to the List Changes dialog box, where you can view the assumed value or values for the ISIR. To view these values, select **View**, **List Changes** from the menu bar.

New for 2004-2005! EDExpress now accommodates the full four-byte field for the Verification Tracking Flag.

New for 2004-2005! The 2003-2004 Pell report, SSN/Name Differences, has been renamed List – SSN Difference and moved to the Global Print dialog box to help you identify students whose current SSNs are different from their original SSNs.

Printing ISIRs

You can print single or multiple ISIRs after you have imported ISIR records into EDExpress. A printed ISIR includes all the applicant information submitted by the student and the computed results from the CPS.

To print a single ISIR:

1. Select **File**, **Print** from the menu bar, then choose **App Express**.
2. Confirm that "ISIR" appears as the Report type.
3. Select **Single** as the Report option if it is not already selected.
4. Choose where to send the report: **File**, **Printer**, or **Screen**. If you choose to print to a file, click the **File** button and type a name for the file.
5. Type the student's Social Security Number, first two letters of the last name, and transaction number (01, 02, etc.) in the Trankey box, or click the **ellipsis (…)** button and select the ISIR you want to print from a list of ISIRs.
6. Select or clear the following options: **Only print records with more than six loans?**, **Print Certification/Signature Page?**, **Print FAA Comments?**, **Print SAR Comments?**, and **Print Loan Information?**
7. Click **OK**.

To print multiple ISIRs:

1. Select **File**, **Print** from the menu bar, then choose **App Express**.
2. Confirm that "ISIR" appears as the Report type.
3. Select **Multiple** as the Report option if it is not already selected.
4. Choose where to send the report: **File**, **Printer**, or **Screen**. If you choose to print to a file, click the **File** button and type a name for the file.

5. You have several options for choosing which ISIRs to print:
   - Click **OK** to print all the ISIRs in the EDExpress database.
   - Click the **Selection Criteria** button, then the **Select Records** button to choose specific ISIRs to print.
   - Use an SSN file. Click the **ellipsis (...)** button in the SSN File section of the dialog box. See online Help for information about creating SSN files.
   - Use a query to select students. Click the **Selection Criteria** button, then click the **ellipsis (...)** button next to Query Title to select a query.
6. Click the **down** arrow in the Sort Order field and select **SSN** or **Last Name** order. If you choose Last Name, records are sorted in order of last name, first name, and then transaction number. The default option 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 highest transaction, the active transaction, or all transactions, respectively. If no transaction is activated, the default is the highest transaction.
8. Select or clear the following options: **Only print records with more than six loans?**, **Print Certification/Signature Page?**, **Print FAA Comments?**, **Print SAR Comments?**, and **Print Loan Information?**
9. Click **OK**.

Introduction to Packaging

What Is Packaging?

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 are 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 sources and amounts specified by your award methodologies and the criteria you attach to them.

This section of this desk reference guides 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.

New for 2004-2005! When an award letter is e-mailed to a student, the year indicator is included in the e-mail attachment title and the subject line of the e-mail.

New for 2004-2005! The Browse grid now lists the term descriptions from your Packaging Academic Year Profile setup in the Term Description–Packaging Academic Year Profile Setup column.

Packaging Setup

Packaging Setup Checklist

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

- Plan priority order for budget codes and award methodology codes
- Create 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
- Define SAP values (optional)
- Set up user-defined database (optional)
- Set up user-defined formulas (optional)
- Write user-defined text (optional)

Important Notes

- If you have not established your assumed school in Global System setup, you must do so before using the Packaging module.
- You can save time by importing much of your Packaging setup from EDExpress for Windows 2003-2004. See "Prior Year Import" in this desk reference for additional information.

Assign Priorities to Packaging Functions

Two packaging elements—Award Methodology and Budgets—are assigned according to priorities you establish.

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

The Packaging module 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:

Code	Priority	Criteria
030	3	Dependency Status = I
020	2	Dependency Status = D
015	1	Dependency Status = D and Housing = 2

A dependent student who reports housing plans of 3 would not meet the criteria for Code 015. However, the student meets the next criteria and is assigned Code 020.

Important Notes

- The element with the most restrictive criteria should have the priority closest to 1 so that it is assessed and assigned first.
- The last priority should have no selection criteria, so it will include those students whose records are missing elements considered critical by your selection criteria.

You may want to number the priorities in increments of 5 or 10 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 processes between priorities 10 and 15.

Packaging System Setup

To set up Packaging system parameters:

1. Select **Tools**, **Setup** from the menu bar, then choose **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.
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 when printing letters for multiple students.
Award Letter Type	This field defines which award letter type you want to print. **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. Select the checkbox if you want to allow the Pell EFC field to be modified after the ISIR is imported into Packaging.
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 priority 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 taken 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. It is enabled only if the priority deadline date type is **U** (User Defined Date).
Use Low Tuition?	This field enables you to access the Low Tuition Tables for use in packaging students who qualify.
Default Housing Plans	This field defines a default value for manually created records and imported ISIRs with a blank value for Housing Plans. Valid housing plan options are: **1** = On campus **2** = Off campus **3** = With parent

3. Click **OK** to continue.

4. Click **Yes** to save.

Establish Academic Year Profiles

Academic year profiles determine how your funds are divided. Academic Year Profile setup enables you to customize up to five terms, including distribution percentages for seven types of awards. You can create an unlimited number of academic year profiles.

For the academic year profiles, gather and enter information for Federal Pell Grant formulas (standard term, clock-hours, etc.) and distribution percentages for aid programs.

New for 2004-2005! The five enrollment questions on the 2003-2004 FAFSA (Summer 2003, Fall 2003, Winter 2003-2004, Spring 2004, Summer 2004) have been replaced with a single enrollment question for 2004-2005. Valid values are 1 = Full time, 2 = 3/4 time, 3 = 1/2 time, 4 = < 1/2 time, and 5 = Not sure. "Not sure" is imported into Packaging as "Full time."

To establish academic year profiles:

1. Select **Tools**, **Setup** from the menu bar, then choose **Packaging**, **Academic Year Profile**.

2. If this is your first time adding an academic year profile, go to Step 3. To add more academic year profiles, click **Add**.

3. Enter the following parameters:

Parameter	Description
Code	This code is a four-character code you assign to identify 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	The title is the 50-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: • Standard term credit-hour programs of less than 30 weeks, • Clock-hour and credit-hour programs without terms, and • 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 that you designate. For example, Fall, Spring, Term One, Term Two, etc.
Enrollment Status	This field indicates the 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 **OK** to continue.

5. Click **Yes** to save.

Enter Fund Maintenance Information

In Fund Maintenance setup, you can 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 set up Fund Maintenance:

1. Select **Tools**, **Setup** from the menu bar, then choose **Packaging**, **Fund Maintenance**.

2. If this is your first time adding a fund, go to Step 3 below. For more funds, click **Add**.

3. Enter the following parameters:

Parameter	Description
Fund Code	This code is an abbreviated identification code (of up to eight characters) you assign to identify each fund.
Fund Description	This description is a full description (of 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. Aid types D, E, F, K, P, S, W, and U can be used only once, after which they no longer appear on the list. **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?	Select 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	Use this field to select queries to determine the group of students eligible to receive this fund.
Beginning Balance	This field represents the beginning balance in your 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 your 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. See the following section for additional information.

4. Click **OK** to continue.

5. Click **Yes** to save.

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 **Help** in the Fund Maintenance dialog box, then choose the related topic Fund Maintenance Setup Examples.

Enter Remaining Need Information

You can award a specific amount from a fund at different levels of remaining need within the packaging process. For example, if you have a school fund that you want to award for different levels depending on the remaining need of the aid recipient, you can do so with this feature. Remaining need is optional for Packaging.

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 for all funds in 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. For example, if the first range is 0-500, the next range should start with 501 or higher.

Define Award Methodologies

You can establish methodologies for determining how various funds are awarded to a specific population of students. You must choose whether you will enter maximum percentages or dollar amounts.

For award methodology examples, click **Help** in the Award Methodology dialog box, then choose the related topic Award Methodology 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 all 9s for the maximum EFC and the maximum amount.

- 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 are created in Query.

- If you need to base your award methodology on EFC ranges, such as for a state grant that uses EFC ranges as criteria, you can have too many ranges to define in one award methodology code and still include other funds. In this situation, you can define Packaging queries for each EFC range. Add the EFC queries as primary query criteria to an equal number of award methodologies, then add the state grant to each methodology by using the Award Min and Award Max fields to control the exact award amount for that EFC range.

To define award methodologies:

1. Select **Tools**, **Setup** from the menu bar, then choose **Packaging**, **Award Methodology**.

2. If this is your first time adding an award methodology, go to Step 3. To add more award methodologies, click **Add**.

3. Enter the following parameters:

Parameter	Description
Code	This code is a four-character, user-defined code used to identify the methodologies.
Title	The title is the description (of 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 is packaged, regardless of the criteria used in your other methodologies.
Use Percentages or Use Dollar Amount	These options enable you to use percentages or dollar amounts for the Self-Help and Gift Aid Maximum fields. Select the appropriate option.
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 the award methodology.
School Max	This field indicates the maximum amount awarded for this fund within the award methodology.

Parameter	Description
Min EFC	This field identifies the minimum EFC allowed for this fund to be packaged when using the award methodology.
Max EFC	This field identifies the maximum EFC allowed for this fund to be packaged when using the 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 **OK** to continue.

5. Click **Yes** to save.

Establish Budgets

A budget defines the cost of attendance for a specified program in a standard academic year. 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's needs. You can create a single budget for your entire applicant population or separate budgets for subsets of your students.

For budget examples, click the **Help** in the Budgets dialog box, then choose the related topic Budget Setup Examples.

To establish budgets:

1. Select **Tools**, **Setup** from the menu bar, then choose **Packaging**, **Budgets**.

2. If this is your first time adding a budget, go to Step 3 below. For more budgets, click **Add**.

3. Enter the following parameters:

Parameter	Description
Budget Code	This code is a four-character, user-defined abbreviated identification code assigned to each budget. This code appears on the student's record.
Priority	This field enables you to prioritize the order in which EDExpress searches the budget database when assigning budgets. The first budget in which 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 can be modified in individual records and in multiple records using Multiple Entry.
Title	The title 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.
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 Cost, and Miscellaneous. These can be left blank.
User Defined Budget Amounts	If the student's budget contains other components, enter the title and amount here.

4. Click **OK** to continue.

5. Click **Yes** to save.

Important Note

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

Define SAP Values (Optional)

EDExpress enables 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.

You can prevent records from being packaged if students do not meet your SAP criteria by creating SAP codes containing the No Pkg Flag. You must add the codes to student records prior to the packaging process. You can define an unlimited number of SAP codes.

For SAP values examples, click the **Help** button in the SAP Values dialog box.

To define SAP codes:

1. Select **Tools**, **Setup** from the menu bar, then choose **Packaging**, **SAP Values**.

2. Enter the following parameters for each SAP code:

Parameter	Description
SAP Code	This field is a two-character alphanumeric identifier.
No Pkg Flag	This option prevents students with this code from being packaged.
SAP Description	This field is a 50-character description of the code.

3. Click **OK** to continue.

4. Click **Yes** to save.

Set Up a User Database (Global)(Optional)

EDExpress allows you to add your own fields to the database. These fields appear on the student's record and can be used in developing queries. You can create up to 248 user-defined fields in your database.

Note: To change a user-defined field, you must delete it and recreate it. You cannot modify user-defined fields.

You can populate user-defined data fields manually by opening a student's record, selecting the User Data tab, and entering the data, or automatically by using Multiple Entry. You can also use a Global external import file to add user-defined data fields.

New for 2004-2005! The User Data report now uses the same heading as other EDExpress reports containing information covered by the Privacy Act. Add Date, Add ID, Add Time, Update Date, Update ID, and Update Time no longer print on the report.

To set up a user-defined database:

1. Select **Tools**, **Setup**, **Global**, **User Database** from the menu bar.
2. Click **OK**.
3. Enter the following parameters for each field you want to add to your database:

Parameter	Description
Field	This field is the name of the field. You can use up to 20 characters.
Type	This field is the type of data used in the field. Click the **down** arrow to display a list of types.
Length	This field specifies the length of the data: **Date: 8** **Numeric: 1-10** **Text: 1-40** **Yes or No: 1**
Description	This description is a description of the field. You can use up to 50 characters.

4. Press **Enter** or click **Add** to add additional fields.
5. When you are finished adding fields, click **OK** to continue.
6. Click **Yes** to save.

Set Up 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 examples of user-defined formulas, click the **Help** button in the lower portion of the User-Defined Formulas dialog box. Use the **down** arrow to 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** from the menu bar, then choose **Packaging**, **User-Defined Formulas**.

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

Parameter	Description
Table	This setting determines where the value you use in Field 1 resides. Enter: • **S** for a field from the Student Database • **F** for a field from the Fund Maintenance Database • **U** for a field from the User Database
Field Name	This field lists all the fields that are available from the table chosen in the Database Table 1 Field.
Operand	This option lists the mathematical operations available: addition, subtraction, multiplication, or division.
Table	This setting 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 • **U** for a field from the User Database
Field Name	This field lists all the fields that are available from the table chosen in the Database Table 2 field.
Description	This description displays the name of the field that describes the result of your formula.

3. Click **OK** to continue.

4. Click **Yes** to save.

Important Notes

- 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** from the menu bar to apply the new formula to your records.

- 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.

Create User-Defined Text (Global) (Optional)

In EDExpress, you can create text for award letters, document tracking letters, and other letters (user letters) that your school routinely sends to students. You can create as many user letters as you need. Letters are formatted so that when the letter is folded, the student's address appears in the window of a #10 window envelope. The setup options for letters are located in Global setup.

To create user-defined text:

1. Select **Tools**, **Setup** from the menu bar, then choose **Global**.
2. Choose **User-Defined Award Letter Text**, **User-Defined Doc Tracking Letter Text**, or **User-Defined User Letter Text** to create your text.
3. Enter your text.
   - For **user letters**, enter a title. You can also associate the letter with a specific module. You can enter up to 42 lines of text.
   - For **award letters**, you can enter up to 12 lines of text and choose to include a greeting with the student's name. If you include a greeting, we suggest you allow an extra space between the greeting and the text.
   - For **document tracking letters**, you can enter up to 14 lines of text and choose to include a greeting with the student's name. You can also choose to modify the preset text in text blocks 2 and 3.
4. Click **OK** to continue.
5. Click **Yes** to save.

Creating Packaging Records

Packaging Entry

You can use three types of entry to establish a packaging record:

- **Manually** enter data from a printed document, such as a SAR, an ISIR, or a paper FAFSA.
- **Import ISIR data** from the application processing module of EDExpress (App Express).
- **Import records** from your school system using the Import External Add option.

Important Note

- If you intend to import records from your school system, you must follow the record layouts found in the *Packaging Technical Reference*. It is available for downloading from the U.S. Department of Education's Federal Student Aid Download (FSAdownload) Web site located at **fsadownload.ed.gov**.

Manual Entry

If a student does not already have a demographic record in the database, follow the steps below to enter the student's record manually.

To enter a student record manually:

1. Select **File**, **New** from the menu bar.
2. Enter the student's SSN.
3. Enter the student's demographic information on the Demo tab. At minimum, you must enter a first or last name. For packaging purposes, enter the student's dependency status.
4. Click **Save**.
5. Click the **Awards** tab.
6. Complete the student's packaging record. Press **F1** for help with completing each field.
7. To save the packaging record, select **File**, **Save** from the menu bar.
8. To return to the EDExpress main screen, select **File**, **Close** from the menu bar

Important Note

- Make sure the correct dependency status appears on the Demo tab. Packaging awards funds, in part, based on this field.

Importing ISIRs

You can quickly establish a student's financial record by importing the student's ISIR data from App Express. The ISIR import process imports the active transaction. See online Help for more information.

New for 2004-2005! If you import a student's ISIR into Packaging and the ISIR has a SAR C flag, the flag appears as a read-only field in the Status Information box on the Awards tab.

To import ISIRs:

1. Select **File**, **Import** from the menu bar, then choose **Packaging**, **Packaging Data–ISIR Data**.

2. Enter the following parameters:

Parameter	**Description**
Report to	Choose **Printer**, **File**, or **Screen** to print, send to a file, or view the Packaging Import ISIR Data report. The report shows the results of the ISIR import process.
Add Budgets?	Choose this option to assign budgets automatically to the students upon import.
Print a list of imported packaging records?	Choose this option to print a list of records added during the ISIR import process.
Academic Year Profile	Choose this option to assign an academic year profile to each record during the ISIR import process. Click the **ellipsis** (**…**) button to display and select from a list of codes.
Selection Criteria	Choose Selection Criteria to narrow the selection of students during the ISIR import process.

3. Click **OK**.

Important Notes

- To avoid packaging a student's record in error, the Packaging module does not import rejected ISIRs from the App Express module.
- You must have at least one academic year profile code defined to import ISIRs. You may also want to set up your budget codes.
- 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

You can import records from your school's external system into EDExpress to establish student financial aid records. To use the Import External Add or Change function, you must first create an input file according to the specifications provided in the *Packaging Technical Reference*, which is available from the U.S. Department of Education's Federal Student Aid Download (FSAdownload) Web site, located at **fsadownload.ed.gov**.

New for 2004-2005! A 50-character e-mail address field has been added to the External Add and External Change imports. Please note that the e-mail address field is a *designated field* and must occupy positions 406-455 in the import files. A blank e-mail address field is interpreted as *no change*.

To import external records from your school system:

1. Select **File**, **Import** from the menu bar, then choose **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 enables 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 enables 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. Select this checkbox to print the Funds Imported Report upon completion of the import process.

3. Click **OK**.

The Package, Unpackage, and Repackage Processes

The Basic Processes

The Package, Unpackage, and Repackage processes are available in two different modes.

Single Student

Using this mode, you can open and process an individual student's record.

- For Package and Repackage, the student's record must be open. Individual packaging is available from the Awards tab or by selecting Process, Package from the menu bar, then choosing Selection Criteria.
- For Unpackage, the student's record can be closed.

To package, unpackage, or repackage an individual student record:

1. Select **File**, **Open** from the menu bar.
2. Enter the student's SSN.
3. Click **OK**.
4. Click the student's **Awards** tab.
5. Select **Process** from the menu bar, then choose **Package**, **Unpackage**, or **Repackage**.

Multiple Students

Using this mode, you can package a group of students by selecting Process, Package from the menu bar, then choosing Selection Criteria. You can also use the Sort By option to sort the records you selected to package. When the 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).

To package, unpackage, or repackage a group of students:

1. With records closed, select **Process** from the menu bar, then choose **Package**, **Unpackage**, or **Repackage**.
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**.

Package

The Package process creates a student financial aid package for a student or a group of students in your Packaging database.

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

Unpackage

The Unpackage process reverses the Package process. It performs these actions:

- Returns all monies to the funds from which they originated 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.

Important Notes

- The Unpackage process returns awarded funds to the fund accounts you established in Fund Maintenance. Note that awarded funds marked “Do not remove if unpackaged?” are 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).

Repackage

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.

Important Note

- To repackage records, the packaging status must be: **P** (Packaged), **H** (Hand Packaged), or **M** (Manually adjusted package).

Printing Reports

Print Award Letters

In EDExpress, you can print two types of award letters:

- **Financial Aid Award Offer**: Students return this letter to the financial aid office if they want to accept part or 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.

New for 2004-2005! The Exclude SSN? checkbox in the Print dialog box enables you to exclude the student's Social Security Number from award letters, document tracking letters, and user-defined letters.

To print award letters:

1. Select **File**, **Print** from the menu bar, then choose **Packaging**.
2. Click the **down** arrow next to Report and select **Letters–Award**.
3. Click **Single** to print a letter for a single student; click **Multiple** to print a letter for a group of students.

4. Click **Printer**, **File**, **Screen**, or **E-mail** for the output destination. If you print to the screen, this action does not affect your letter count. 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 file name in the text box.

5. Enter the following parameters:

Parameter	Description
Enter SSN	(Single option only) This field is the SSN of the student who will be receiving the letter.
Address	This field specifies the address you want to use. The information is taken from the Demo tab.
Sort Order	(Multiple option only) This field specifies the order in which the letters will print. Sort order options are Last Name, SSN, or Zip Code.
Acceptance Date (Offer Letter)	This date is 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 is dimmed on the screen), but is required for offer letters.
Exclude Heading from Letter?	This option omits the heading "Financial Aid Award Notification XXXX-XX Award Year" from the award letter.
Exclude Records with Award Letter Received?	(Multiple option only) This checkbox prevents printing award letters already marked as received.
Exclude Needs Analysis?	This option omits the need analysis detail from the award letter.
Print User Defined Text?	This option prints the text you set up in User-Defined User Letter Text setup.
Print Missing Documents?	This option prints a list of requested documents missing or incomplete from the student's file.
Exclude Signature?	This option omits the signature block on the award letter.
Exclude SSN?	This option excludes the student's Social Security Number from the award letter.
Print School Name/Address?	This option is marked automatically by EDExpress. By clearing this checkbox, you are indicating you *do not* 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**.

Print FISAP-Eligible Dependent/Independent Students

This option prints 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 you are preparing Part II, Section F of the FISAP.

To print FISAP-eligible dependent/independent student information:

1. Select **File**, **Print** from the menu bar, then choose **Packaging**.
2. Click the **down** arrow next to Report 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 file name in the box.
4. Select the **Print Detail?** checkbox 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.
- 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

Using this option, you can 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

To print lists:

1. Select **File**, **Print** from the menu bar, then choose **Packaging**.
2. Click the **down** arrow next to Report 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 and type a name for the file. EDExpress automatically enters the file name in the box.

   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.

4. Depending on the item you selected, select the remaining options available to you on the screen.

5. (optional) Click **Selection Criteria** to select specific records or to use a query to select a group of records.

6. Click **OK**. If you chose Screen as your output destination, use the **scroll bars** to view the list. Click **Close** when you have finished.

Exporting Packaging Data

Packaging Export

In EDExpress, you can export Packaging data to an external system.

To export Packaging data:

1. Close any records that are open.
2. Select **File**, **Export** from the menu bar, then choose **Packaging**.
3. Confirm that **Packaging Data** appears in the Export Type box. The default path and file name appear in the Export To box.
4. If you want to export using a different file name, click the **File** button and name the file.
5. Select the export status.

   Note: When you create a packaging record, the read-only External Export flag on the Awards tab is set to Y, indicating that the record can be exported in an External Export file. Selecting Y as the Export Status exports packaging records that have Y as the External Export flag. If the packaging record is not complete, or if you have previously exported the packaging record, the External Export flag is set to N.

   Selecting N as the Export Status exports packaging records that have N as the External Export flag. Selecting Both exports packaging records with either Y or N as the External Export flag. If you make changes to a student's packaging record that has N as the External Export flag, the External Export flag changes back to Y.

6. Select the delimiter type.

7. Type the format code in the Format Code box, or click the **ellipsis (...)** button to select from a list of format codes.

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

9. Click **OK** to export the data. EDExpress exports the file to the file shown in the Export To box, and an In Progress box appears.

10. Click **OK** to close the In Progress box when the export is finished.

Important Notes

- To use the Export feature in Packaging, you must establish a file format. See the topic “File Format” in the EDExpress online Help for more information.

- The default export message class is PKEX05IN.*.

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.

Queries are specific to individual modules, so you must create your queries in the modules in which you intend to use them. For example, if you need a query to use when printing a list of ISIRs, you must create the query in the App Express module.

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" in the online Help for more information.
- Both segments of the query connected by AND must be true for a record to be selected.
- Only one of the segments connected by OR must be true for a record to be selected.

Helpful Hints!

- Select the **Field to Field Comparison** 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 selected Prompt at Execution or Current Date. See "Field to Field Queries" in this desk reference for examples.

- Select **Help**, **Help Topics** from the menu bar, then choose **Contents**, **Query dialog box** for information about:
  - Query dialog box
  - Query Grid dialog box
  - Parameter Query Entry dialog box
  - View Query dialog box

Creating a Query

To create a query:

1. Select **Tools**, **Query** from the menu bar.

2. Click the tab of the module for which you want to create the query.

3. Click **Add**.

4. Type a descriptive title for the query. The title can consist of any keyboard character except the pipe symbol (|) and apostrophe (’).

5. 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.

6. Click the **down** arrow in the Operator field to select an operator.

7. 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, select the **Prompt at Execution** checkbox. Note that Prompt at Execution queries cannot be used with Packaging setup.

8. Click the **Append** button to add the query statement to the Criteria box.

9. (optional) Click the **And** button or the **Or** button to add another statement to the query.

10. Repeat steps 5-9 until you have added all statements for the query, then continue with step 11.

11. Click **Save** to save the query. Click **OK**.

12. Click **OK** to close the Query dialog box or click **Add** to create another query.

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.

When you open Query for the first time, you will see that the predefined queries are stored as the first set of records in the Query database. You will know a query is predefined if you see "PREDEFINED QUERY" in the upper right corner of the Query dialog box.

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

New for 2004-2005! A predefined parameter query, PROCESSED RECORD TYPE, has been added for the Record Type field on the ISIR. This query helps you to identify and differentiate ISIR transactions based on the source; for example, FAFSAs, or ISIR corrections.

To create a query from a predefined query:

1. Select **Tools**, **Query** from the menu bar.
2. Click the tab of the module for which you want to create the query.
3. Click the **Retrieve** button. Use the arrow buttons in the database buttons box to locate the predefined query you want to use for a template. Click **OK**.
4. Type a new title for the query. You can modify and save a predefined query only if you rename it.
5. To delete a line, select the line and click **Remove**. To add a new line, select the line in the Criteria box below which you want to add the new line. 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.

6. Click **Save** to save the query. Click **OK**.

7. Click **OK** to close the Query dialog box or click **Add** to create another query.

Important Note

- Parameter (Prompt at Execution) queries *cannot* be used with Packaging setup (for example, Fund Maintenance and Award Methodology).

Modifying a Query

To modify a query:

1. Select **Tools, Query** from the menu bar.

2. Click the tab of the module for the query you want to modify.

3. Click the **Retrieve** button. Use the arrow buttons in the database buttons box to locate the query you want to modify.

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 delete a line, select the line and click **Remove**. To add a new line, select the line in the Criteria box below which you want to insert the new line. 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 dialog box.

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.

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 appears.

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

   - If the Parameter Query column is not selected, 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 8.

   - If the Parameter Query column is selected, 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 appears.

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 selected.

5. Click the **View Query** button to see the completed query. Review the query carefully to be sure you have entered the correct values for each field.

6. Click **Close** to return to the Parameter Query Entry dialog box.

7. Click **OK** to save your entries.

8. Click **OK** to run the query. An In Progress box displays the progress of the process.

9. Click **OK** to clear the In Progress 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" 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 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 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 the **Packaging** tab.

((DOCUMENT STATUS = 'P') OR

(DOCUMENT STATUS = 'V') OR

(DOCUMENT STATUS = 'B')) AND

(DEPENDENCY STATUS = 'I')

Field to Field Queries

The Field to Field option helps you build a query that compares numeric fields within one record. For example, if a student has two ISIR transactions, a field to field query 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.

Examples of Field to Field Queries

As an example of how to use this function, you can query on taxes paid as a percentage of AGI. The statement would look something like this:

> PARENTS' U.S. INCOME TAX > PARENTS' ADJUSTED GROSS INCOME * 0.10 (or other decimal for the percentage you choose)

More examples:

> Father's Income > Parents' Adjusted Gross Income
>
> Mother's Income > Parents' Adjusted Gross Income
>
> Student's Income > Student's Adjusted Gross Income
>
> Student's U.S. income Tax Paid > Student's Adjusted Gross Income * 0.22 (or other percentage you choose)
>
> Worksheet A > Student's Adjusted Gross Income * 0.07 (or other percentage you choose)
>
> Worksheet B > Student's Adjusted Gross Income * 0.11 (or other percentage you choose)
>
> Worksheet C > Student's Adjusted Gross Income

Deleting a Query

To delete a query:

1. Select **Tools**, **Query** from the menu bar.

2. Click the tab of the module for the query you want to delete.

3. Use the arrow buttons in the database buttons box to locate the query you want to delete. You cannot delete predefined queries.

4. Click **Delete** in the database buttons 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.

Bits and Bytes

Message Classes (Sent by CPS)

Data Type	Message Class	Data Description
Daily	IDAP05OP	Daily ISIRs that are the result of application records submitted by the school
Daily	IDCO05OP	Daily ISIRs that are the result of correction records submitted by the school
Daily	IDSA05OP	Daily ISIRs that are generated for all schools listed on the record
Daily	IDRE05OP	Daily ISIRs for state agency residents
Daily	IDNR05OP	ISIRs for state agency non-residents
Daily	HOLD05OP	Signature Hold records
CPS Pushed	IGCO05OP	CPS Pushed ISIRs that are the result of correction records submitted by the school

Data Type	Message Class	Data Description
CPS Pushed	IGSA05OP	CPS Pushed ISIRs that are generated for all schools listed on the record
CPS Pushed	IGRE05OP	CPS Pushed ISIRs for state agency residents
CPS Pushed	IGNR05OP	CPS Pushed ISIRs for state agency non-residents
Requested	ISRF05OP	ISIRs requested directly from the ISIR Datamart
Errors	EAPR05OP	Error records from processing of application data
Errors	CORE05OP	Error records from processing of correction data
Errors	SIGA05OP	Error records from processing of signature records

Helpful Hint!

For record lengths, see the *EDE Technical Reference*, which is available for downloading from the U.S. Department of Education's Federal Student Aid Download (FSAdownload) Web site, located at **fsadownload.ed.gov**.

Downloading EDExpress Software and Documentation

EDExpress for Windows 2004-2005, Release 1.0, is distributed on 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**. The FSAdownload Web site was created to give you access to financial aid tools for easier and more efficient use of EDExpress.

The following types of paper documentation are available to download from the Internet in Adobe PDF format:

- Installation guides
- Cover letters
- Technical references
- Desk references

Instructions for downloading EDExpress for Windows software and documentation are located in the "Downloading Documentation and Software from the FSADownload Web site" chapter of the *EDExpress for Windows 2004-2005 Installation Guide*. 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.

If you experience difficulties with the EDExpress for Windows 2004-2005, Release 1.0 software, contact CPS/WAN Technical Support at **800/330-5947** or via e-mail at **cpswan@ncs.com**.

Important Note

- Some organizations block their users' ability to download software from the Internet. If you have trouble downloading EDExpress, try again later. If you are still unable to download, contact your technical support staff to ensure you have full download rights.

Getting Help

Online Help

General help is available from the menu bar within EDExpress. You can view the main list of help topics by selecting **Help**, **Help Topics**, **Contents** from the EDExpress 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 Help. Also, field help is available by pressing the F1 key.

Helpful Hints!

- Open the Help Contents books to access Help topics. Each book contains several individual Help topics.
- Check the How Do I? topics for frequently performed procedures by selecting 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 contains helpful contact information for all Federal Student Aid programs, including frequently called help lines, e-mail addresses, phone numbers, and Web site addresses. The document is available for downloading from the U.S. Department of Education's Federal Student Aid Download (FSAdownload) Web site located 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 EDExpress. The four technical references that are available from the U.S. Department of Education's Federal Student Aid Download (FSAdownload) Web site located at **fsadownload.ed.gov** are:

- The ***EDE Technical Reference***, which 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 EDExpress. For further assistance, call 800/330-5947.
- The ***Packaging Technical Reference***, which is a compilation of record layouts for adding and changing records in the Packaging module of EDExpress.
- The ***Common Origination and Disbursement (COD) Technical Reference***, which provides processing information and technical specifications for Full Participant schools transmitting the Common Record in XML format and Phase-In Participant schools transmitting the Common Record in legacy format to the COD system.
- The ***SSCR Technical Reference***, which provides programmer specifications and record layouts for schools or other organizations that need to design software systems to interface with ED's software for SSCR data. Included are record layouts for all record exports to the NSLDS.