

March 2019

RE: EDEExpress for Windows 2019-2020, Release 2.0

Dear EDEExpress Users:

Federal Student Aid is pleased to announce the availability of EDEExpress for Windows 2019-2020, Release 2.0. Release 2.0 adds Federal Pell Grant (Pell Grant), William D. Ford Federal Direct Loan (Direct Loan), and Teacher Education Assistance for College and Higher Education (TEACH) Grant functionality for the 2019-2020 award cycle.

About this Cover Letter

This letter includes the following information:

- Overview of EDEExpress 2019-2020, Release 2.0
- Login information for EDEExpress 2019-2020
- Important notices and reminders regarding:
 - Master Promissory Note (MPN), MPN Manifest, and Disclosure Statement printing
 - Pell Grant payment and disbursement schedules in Release 2.0
 - Use of Additional Eligibility Indicator in Pell Grant module
- Microsoft Windows compatibility and Section 508 compliance notices
- Contact information for technical support and additional assistance

EDEExpress users send and receive Pell Grant, TEACH Grant, and Direct Loan origination and disbursement data to and from the Common Origination and Disbursement (COD) System using the Common Record's eXtensible Markup Language (XML) format. The software converts the data to XML format automatically during the export process and can import files returned from the COD System in XML format.

For information regarding the availability of the 2019-2020 COD System, see the electronic announcement posted in March 2019 on the Federal Student Aid's Information for Financial Aid Professionals (IFAP) Web site located at ifap.ed.gov.

Important Note: Under certain limited circumstances, such as awarding the maximum full-time Pell Grant award to individuals whose parent or guardian died as a result of military service in Iraq or Afghanistan after September 11, 2001, you must use the COD Web site (cod.ed.gov) to originate the award. Otherwise, if you plan to use EDEExpress to exchange data with the COD System, we recommend you do not originate Pell Grant, TEACH Grant, or Direct Loan records on the COD Web site unless directed to do so by Federal Student Aid.

EExpress for Windows 2019-2020, Release 2.0 Overview

EExpress 2019-2020, Release 2.0 adds three software modules:

- Pell Grant
- Direct Loan
- TEACH Grant

In addition, Global functionality applicable to all modules, such as Security setup, Document Tracking setup, and User Database setup and entry is added during any installation of EExpress.

EExpress 2019-2020, Release 2.0 can be installed as an upgrade to Release 1.0 (posted in September 2018). You must have Release 1.0 installed to run an upgrade (or “custom”) installation of Release 2.0.

Reminder: Before upgrading to Release 2.0, ensure you have a reliable backup copy of your current EExpress 2019-2020 production database (**expres20.accdb**).

To upgrade to Release 2.0, select the Stand Alone Custom or Workstation Custom option during installation, depending on your EExpress operating environment.

If you have not previously installed EExpress 2019-2020, you can proceed directly to a Stand Alone Full or Network Server/Workstation Full installation of Release 2.0. Be aware, however, that a Stand Alone Full or Network Server/Workstation Full installation loads a new, blank EExpress 2019-2020 database to your system. If you have an existing 2019-2020 database, a Stand Alone Full or a Network Server/Workstation Full installation of Release 2.0 will overwrite your database and all previously entered 2019-2020 data will be lost.

For more technical guidance and information regarding the EExpress installation process, see the *Installation Guide for EExpress for Windows 2019-2020*.

Logging into EExpress 2019-2020

If you upgrade from EExpress 2019-2020, Release 1.0 to Release 2.0, your User IDs, passwords, and other security settings are carried forward to Release 2.0 and do not need to be recreated.

If you have not installed EExpress 2019-2020 prior to Release 2.0, when you first access the software after installation, the default User ID is SYSADMIN and the default password is **\$y\$tem Adm1n**. Be sure to include the space between **\$y\$tem** and **Adm1n** (the two parts of the default password).

After you enter the default user ID and password, EExpress 2019-2020 requires that you immediately define a new password for the SYSADMIN. New passwords must be a minimum of 12 characters and must include at least one uppercase letter, one lowercase letter, one number, and one keyboard character that is not a letter or number (such as an exclamation mark or other punctuation symbol). You can adjust the minimum password length and other requirements in the Password Setup dialog box (**Tools, Setup, Global, Password Setup**).

In addition, the SYSADMIN user ID only provides access to critical administrative functions in order to limit its use for routine software tasks and improve your ability to trace actions taken in the software to specific users. EDEExpress administrators at your school should create unique user IDs in Security Users setup with the necessary access (based on the associated Security Group) and log into the software under those IDs for most software tasks they perform.

New for 2019-2020! You can use the Prior Year Import function to pull user IDs and passwords from your EDEExpress 2018-2019 database into EDEExpress 2019-2020. This option was removed temporarily in EDEExpress 2018-2019 due to changes in minimum password requirements.

For more information on security setup, see EDEExpress Help in the software and the *EDEExpress for Windows 2018-2019 Installation Guide*.

MPN, MPN Manifest, and Disclosure Statement Printing Reminder

Direct Loan Master Promissory Notes (MPNs), MPN manifests, and Disclosure Statements must be printed outside of EDEExpress using a different onsite system or completed by the borrower online at the StudentLoans.gov Web site.

EDEExpress tracks the MPN status and other related information (such as the MPN expiration date) on Direct Loan records based on response data sent by the COD System. You can also indicate whether the Disclosure Statement has been printed.

For more information and guidance on the Direct Loan MPN, MPN manifest, and Disclosure Statement, see Volume II, Section 1 of the *2019-2020 COD Technical Reference*, which is available on the IFAP Web site.

Federal Pell Grant Payment and Disbursement Schedules in EDEExpress 2019-2020, Release 2.0

Federal Student Aid announced the 2019-2020 Pell Grant Payment and Disbursement schedules in [Dear Colleague Letter GEN-19-01](#), posted on January 23, 2019 to the IFAP Web site.

As noted in the Dear Colleague Letter, the maximum 2019-2020 Pell Grant award for a full-time student with an Expected Family Contribution (EFC) of zero is now \$6,195, an increase of \$100 over the previous maximum of \$6,095. The maximum Pell-eligible EFC is also increased for 2019-2020 from 5486 to 5576. As a result of the EFC increase, some applicants who were initially processed by the Central Processing System (CPS) as ineligible for a 2019-2020 Pell Grant award due to their EFC are now Pell-eligible.

The CPS began processing 2019-2020 application and correction records according to the revised Pell schedules on March 17, 2019. The CPS also reprocessed 2019-2020 Institutional Student Information Records (ISIRs) on March 19, 2019 for students who applied or submitted corrections before March 17, 2019 and, under earlier formulas, were designated as not being Pell-eligible, but who are now eligible for a 2019-2020 Pell Grant under the new formulas due to their EFC.

For more information and a complete description of the changes for the 2019-2020 award year, see Dear Colleague Letter GEN-19-01 and the [February 12, 2019 electronic announcement](#) posted to the IFAP Web site regarding implementation of the 2019-2020 Pell schedules.

EDEExpress 2019-2020, Release 2.0 incorporates the 2019-2020 Pell schedules into the following functionality (listed by module):

Global

We updated the Pell Grant Schedule tab available under **Tools, Browse, Global** to reflect the 2019-2020 Pell Grant payment and disbursement schedules.

Packaging

We updated the Package and Repackage processes to award Pell Grants (Packaging Aid Type = **F**) according to the 2019-2020 Pell Grant payment and disbursement schedules.

If you create Packaging records by importing ISIR data, you should import any new ISIR transactions you received for student records impacted by the March 19, 2019 reprocessing into the Packaging module. This helps ensure the Pell Eligibility field on the Packaging record is set correctly. You must unpackage existing Packaging records at a Packaging Status of **P** (Packaged), **M** (Manually Adjusted), or **H** (Hand Packaged) before you can import new ISIR transactions. Before unpackaging these records, you may want to print the Packaging Record report for each student so you have a record of the funds you originally awarded to them (in case you need to recreate the awards).

After you import all reprocessed ISIR data into the Release 2.0 Packaging module, run the Repackage process for all Pell-eligible Packaging records, unless you already adjusted Pell Grant awards on these records prior to installing Release 2.0 to match the scheduled award amounts in Dear Colleague Letter GEN-19-01. The Repackage process will update the Pell Grant awards for your Packaging records to follow the 2019-2020 Pell Grant payment and disbursement schedules.

Pell Grant

We updated the Pell module's Calculate Award Amount for Entire School Year function, available on the Process menu from the EDEExpress main menu and the Origination (Pell Grant) tab, to follow the 2019-2020 Pell Grant payment and disbursement schedules.

Important Note: We anticipate that EDEExpress 2019-2020, Release 2.0 will be posted at least one week before the implementation of the 2019-2020 Pell Grant payment and disbursement schedules in the COD System. EDEExpress Pell users will need to delay exporting origination and disbursement information created in Release 2.0 for processing until the COD System is available.

Use of Additional Eligibility Indicator in Pell Grant Module

Section 401(b)(8) of the HEA, as added by Section 310 of the Department of Education Appropriations Act, 2017, (Title III of Division H of P.L. 115-31, the Consolidated Appropriations Act, 2017) allows eligible students to receive one and one-half (or 150%) of their

scheduled Pell Grant award during a single award year to accelerate completion of their program of study. This provision is effective beginning with the 2017-2018 award year. To receive the additional Pell funds, students must be otherwise Pell-eligible and enrolled at least half-time in the payment periods for which the additional funds are awarded.

The Additional Eligibility Indicator field on the Origination (Pell Grant) tab helps you identify students eligible to receive 150% of their scheduled Pell Grant award in a single award year. EDEExpress allows you to disburse up to 150% of the scheduled Pell Grant award if the Additional Eligibility Indicator is selected on the origination record.

You can select the Additional Eligibility Indicator checkbox manually on the Origination tab, use Multiple Entry to update the field, or update the field as part of a Pell Grant External Origination Add/Change import file.

If the Additional Eligibility Indicator is selected on the origination record, the Calculate Award Amount for Entire School Year process calculates 150% of the student's scheduled Pell Grant award and lists the result in the Award Amount for Entire School Year field. For example, if the student is eligible for a Pell Grant scheduled award of \$6,095 and the Additional Eligibility Indicator is selected, the Calculate Award Amount for Entire School Year process calculates an Award Amount for Entire School Year value of \$9,142.50.

For additional information on the 150% Pell Grant eligibility change, see [Dear Colleague Letter GEN-17-06](#), posted on June 19, 2017 to the IFAP Web site.

Release 2.0 Enhancements

The following product enhancements have been incorporated into EDEExpress 2019-2020, Release 2.0.

Note: Some enhancements listed below were originally made available to users in Release 1.0. We are repeating the enhancements here for the benefit of users installing EDEExpress 2019-2020 for the first time. For more information on the 2019-2020 enhancements to Application Processing, Packaging, and Global functionality introduced in Release 1.0, see the *EDEExpress for Windows 2019-2020, Release 1.0 Cover Letter*.

General Changes

- **Updated Cycle References and Message Classes** – We updated software labels, help topics, reports, and other functionality throughout EDEExpress to reference the 2019-2020 cycle. Message classes with cycle indicators are also updated for 2019-2020 in File Management (**Tools, Setup, Global, File Management**) and in various Import and Export dialog boxes throughout EDEExpress.

Note: For more information regarding message classes used by the CPS in 2019-2020, see the Processing Codes section of the *2019-2020 Electronic Data Exchange (EDE) Technical Reference*. For more information regarding message classes used by the COD System in 2019-2020, see Volume III, Section 2 of the *2019-2020 COD Technical Reference*. Both documents are available on the IFAP Web site.

- **Updated EDEExpress Icon and Splash Screen Color to Match 2019-2020 FAFSA** – The EDEExpress software’s Windows icon and splash screen (which is displayed when you first start the software) have been color-coded yellow to match the 2019-2020 Free Application for Federal Student Aid (FAFSA®) form.

Global

The following Global enhancements, added originally in Release 1.0, are also available in Release 2.0:

- **Security Users Setup Restored to Prior Year Import** – You can now pull user IDs and passwords established in your EDEExpress 2018-2019 Security Users setup forward to EDEExpress 2019-2020 using prior year import (**File, Import, Global**). This functionality was removed temporarily in EDEExpress 2018-2019.
- **Password Setup and Desktop Settings Added to Prior Year Import** – We updated prior year import to add Password Setup (**Tools, Setup, Global**) and Desktop Settings (**View, Desktop Settings**), enabling you to pull parameters established for these setup areas added in EDEExpress 2018-2019 forward to your EDEExpress 2019-2020 database.

Pell Grant, TEACH Grant, and Direct Loan Valid Date Ranges

We updated valid date ranges for the 2019-2020 award year to synchronize EDEExpress 2019-2020 with the COD System edits and federal policy. The following valid date ranges are active in Release 2.0.

Field	Valid Date Range
Pell Grant Enrollment Date	10/1/2018 to 6/30/2020
Pell Grant Payment Period Start Date	10/1/2018 to 6/30/2020
Pell Grant Disbursement Date*	10/1/2018 to 9/30/2025*
TEACH Grant Enrollment Date, Payment Period Start Date, and Disbursement Date	On or after 1/1/2019
Direct Loan Date of Birth	1/1/1920 to 12/31/2011
Direct Loan Loan Period Begin Date	On or before 6/30/2020
Direct Loan Loan Period End Date	On or after 7/1/2019
Direct Loan Academic Year Start Date	On or before 6/30/2020
Direct Loan Academic Year End Date	On or after 7/1/2019
Direct Loan Disbursement Date (all loan types)	10/1/2018 to 12/28/2023**

* Although EDEExpress accepts any date on or after 10/1/2018, the valid 2019-2020 date range for Pell Grant disbursement records is from the date the 2019-2020 Pell schedules are posted on the IFAP Web site to 9/30/2025.

**** New for 2019-2020!** To maintain consistency with the COD System, we updated the Direct Loan module in EDEExpress 2019-2020 to only allow disbursement dates from 10/1/2018 to 12/28/2023.

Pell Grant Enhancements

The following enhancements are available in the Pell Grant module in Release 2.0:

Setup

- **Option to Calculate Pell Awards to Full Dollar or Cents Restored** – We restored the ability for schools to calculate Pell awards and disbursements to the whole dollar or to the penny. Select the **Calculate Amounts Using Pennies?** checkbox in Pell School setup to calculate awards and disbursements to the penny.

Import

- **CFH Indicator Added to MRR, Reconciliation, YTD Import Edit Reports** – We updated the import edit reports for Pell MRR, Reconciliation, and YTD files to add an indicator for students eligible for an increased Pell Grant award under the Children of Fallen Heroes Scholarship Act based on the data in the imported file. Eligible students are dependents of a police officer, firefighter, or other public safety officer who died in the line of duty. If the CFH indicator on the import edit report is selected, the student’s Pell scheduled award is calculated based on a zero EFC by the COD System, regardless of the calculated EFC on the CPS ISIR transaction associated with the Pell Grant record.

Compatibility and Compliance

Microsoft Windows Information

EDEExpress 2019-2020 is only supported currently for the Microsoft Windows 7 and Windows 8 operating systems. For more information on minimal and optimal system recommendations, see the *EDEExpress 2019-2020 Installation Guide* and the [March 7, 2017 electronic announcement](#) posted to the IFAP Web site.

Note: Federal Student Aid has completed compatibility testing using the Microsoft Corporation’s Windows 10 as an operating system for both the EDEExpress and DL Tools programs, and we did not identify any issues. Watch for an electronic announcement on the IFAP Web site describing our Windows 10 testing in more detail.

Section 508 Compliance

To comply with Section 508 of the Rehabilitation Act, all EDESuite PC products are compatible with screen reader technology used by the visually impaired. Screen reader software cannot interpret color shading in EDESuite software entry fields. To accommodate this restriction, EDESuite software includes the following features:

- All software fields that are shaded yellow to indicate they are required also display a “-R” after the software label. The “-R” indicates the field is required.
- All software fields that are shaded blue after a previously saved value has been modified also display a “-C” after the software label. The “-C” text indicates the field has been changed.

Getting Help

If You Have Technical Support Questions

If you have questions regarding EDEExpress installation or functionality, have trouble accessing the software or its user documentation, or require other technical assistance, contact CPS/SAIG Technical Support.

You can reach CPS/SAIG Technical Support Monday through Friday, 8 a.m. – 8 p.m. (ET), at **800/330-5947 (TDD/TTY 800/511-5806)**. You can also send e-mail inquiries, comments, or suggestions to CPSSAIG@ed.gov.

You can also post questions regarding EDEExpress on FSATECH. FSATECH is an electronic mailing list for technical questions about Federal Student Aid systems, software, and mainframe products. For more information on subscribing to FSATECH, go to <https://www2.ed.gov/offices/OSFAP/services/fsatechsubscribe.html>.

If You Have Questions Regarding the COD System

If you have any questions about the COD System, contact the COD School Relations Center at 800/848-0978. You may also e-mail CODSupport@ed.gov.