

September 2019

**RE: EDEExpress for Windows 2020-2021, Release 1.0**

Dear EDEExpress Users:

Federal Student Aid is pleased to announce the availability of EDEExpress for Windows 2020-2021, Release 1.0. This is the initial EDEExpress software release for the 2020-2021 award cycle and includes the Application Processing and Packaging modules, as well as Global functionality such as Security setup, Document Tracking, and User Database.

**About this Cover Letter**

This letter includes the following information:

- Overview of EDEExpress 2020-2021, Release 1.0
- Login Information for EDEExpress 2020-2021
- A list of 2020-2021 enhancements available in Release 1.0
- Enrollment instructions for FAA Access to CPS Online
- Release 1.0 software and user documentation download instructions
- Microsoft Windows compatibility and Section 508 compliance notices
- Contact information for technical support and additional assistance

**Important Note for Packaging Users:** See the note under the Packaging section later in this letter for important information regarding the Federal Pell Grant (Pell Grant) award limits in the EDEExpress 2020-2021 Release 1.0 Packaging module.

**EDEExpress 2020-2021, Release 1.0**

EDEExpress 2020-2021, Release 1.0 consists of two software modules:

- Application Processing
- Packaging

In addition, Global functionality applicable to all modules, such as Security setup, Document Tracking setup and entry, and User Database setup and entry, is added during any installation of EDEExpress. Release 1.0 also includes setup, entry, import, and printing functionality for the College Financing Plan (previously called the Financial Aid Shopping Sheet).

**Note:** EDEExpress 2020-2021, Release 1.0 uses National Center for Education Statistics (NCES) data associated with your OPE ID to update sections of the College Financing Plan document. The NCES data in EDEExpress was most recently updated in July 2019 (in EDEExpress 2019-2020, Release 3.0). If necessary, we will update the NCES information used by EDEExpress 2020-2021 in a future release.

Release 1.0 does not overwrite your EDEExpress databases from prior cycles; instead, it creates a new database specific to 2020-2021 data. You can pull forward certain EDEExpress 2019-2020 data elements for use in 2020-2021, including setup parameters, student demographic data, and user-defined data fields, using the Prior Year Import feature.

## Logging into EDEExpress 2020-2021

When you first access EDEExpress 2020-2021 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, EDEExpress requires that you immediately define a new password for the SYSADMIN. EDEExpress passwords must be a minimum of 12 characters in length 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**).

The SYSADMIN user ID provides access to critical administrative functions only 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.

For more information on security setup, see EDEExpress Help in the software and the *EDEExpress for Windows 2020-2021, Release 1.0 Desk Reference*, which is available for download on the Information for Financial Aid Professionals (IFAP) Web site, located at <https://ifap.ed.gov>.

## Release 1.0 Enhancements

The following product enhancements have been incorporated into EDEExpress 2020-2021, Release 1.0.

### General

- **Updated Cycle References and Message Classes** – We updated software labels, help system topics, reports, and other functionality throughout EDEExpress to reference the 2020-2021 cycle. Message classes with cycle indicators are also updated for 2020-2021 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 2020-2021, see the Processing Codes section of the *2020-2021 Electronic Data Exchange (EDE) Technical Reference*, available on the IFAP Web site.

- **Updated EDEExpress Icon and Splash Screen Color to Match 2020-2021 FAFSA** – The EDEExpress software’s Windows icon and splash screen (which is displayed when you first start the software) have been color-coded orange to match the 2020-2021 Free Application for Federal Student Aid (FAFSA®) form.

## **Application Processing**

The following Application Processing enhancements are available in EDEExpress 2020-2021:

- **New Children of Fallen Heroes Indicator on ISIR** – We added a new field to the ISIR that identifies applicants who may be eligible for the maximum Pell Grant award and other Title IV aid as if they have a zero EFC under the Children of Fallen Heroes Scholarship Act. Eligible students are dependents of a police officer, firefighter, or other public safety officer who died in the line of duty. The new field, labeled CFH Indicator, is printed in the FAA Information section of the ISIR. It is also displayed on the ISIR Review tab by selecting **View, FAA Information**, and is available for selection in queries and file formats in the Application Processing module.
- **ISIR Application Source and Transaction Data/Source Type Value Updates for mySA Mobile Application Transactions** – We updated the Application Source and Transaction Data Source/Type Code fields to include new values identifying application and correction transactions submitted through the mySA mobile application. The values include **8A** (mySA mobile app Application), **8C** (mySA mobile app Correction), **8E** (mySA mobile application EZ FAFSA), **8G** (mySA mobile application EZ FAFSA Renewal Application), and **8R** (mySA mobile application Renewal Application). The new values will be implemented in Spring 2020.
- **ISIR Revisions Due to IRS Tax Form Changes** – The Internal Revenue Service (IRS) implemented tax form changes beginning with the 2018 tax filing year that resulted in changes to the FAFSA and our electronic applications, including revising, removing, and combining FAFSA questions; updating tax form references; and updating system edits on data. We updated multiple ISIR fields and field values to correspond with the application data changes, including removing student and parent exemptions-related fields, removal of values and field label references related to the 1040A/1040EZ tax form types, and the merging of student and parent Untaxed Portions of IRA Distributions and Untaxed Portions of Pensions fields.

## **Packaging**

While no major changes have been made to the EDEExpress Packaging module for 2020-2021, note the following considerations when using Release 1.0:

### ***Federal Pell Grant Award Limits in Release 1.0 Packaging***

At this time, the U.S. Department of Education's (ED's) Fiscal Year 2020 Appropriation has not been approved. Therefore, the Federal Pell Grant Payment and Disbursement Schedule used by the Release 1.0 Packaging module is based on 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.

After ED's Fiscal Year 2020 Appropriation is finalized, we will update the Pell Grant Payment Schedule, if necessary, through a future release of EDEExpress. If you use the EDEExpress Packaging module to award Pell Grants, you may want to wait until it is known if the Pell Payment Schedule changes.

### ***Discontinuation of Subsidized Loan Eligibility for Graduate/Professional Students***

As a result of the Budget Control Act of 2011, SEC. 502, Direct Subsidized Loans cannot be awarded to graduate and professional students (college grade level 6 and 7) if the loan period begins on or after July 1, 2012. We have not modified EDEExpress to accommodate this legislative change, so we recommend that you adjust your Packaging setup accordingly to ensure you are taking this requirement into account.

There are several possible approaches you can take in Packaging setup to prevent the package process from awarding subsidized loans to graduate or professional students, including the use of queries in Fund Maintenance or Award Methodology setup.

For more guidance on how you can modify Packaging setup to address this legislative change, see the [January 11, 2012 electronic announcement](#) posted to the IFAP Web site.

## **Enrollment for FAA Access to CPS Online**

To ensure your school can take full advantage of the EDEExpress 2020-2021 interface with the FAA Access to CPS Online Web site, the Primary Destination Point Administrator (DPA) of the TG number used to send and receive FAFSA and ISIR correction data should verify your enrollment status.

- If your school is enrolled for 2019-2020, your enrollment status rolls over to 2020-2021.
- Your school's Primary DPA must actively confirm the FAA Access to CPS Online services and users associated with your school's TG number on a periodic basis. Monitor the IFAP Web site and e-mail notifications you may receive from Federal Student Aid for announcements on when you need to confirm services and users on behalf of your school.

- If your school is not enrolled, your school's Primary DPA can complete the enrollment for FAA Access to CPS Online site services for your school through the Student Aid Internet Gateway (SAIG) Enrollment Web site, located at [fsawebenroll.ed.gov](http://fsawebenroll.ed.gov).
- An SAIG-FAA User Statement must be printed by the Primary DPA and signed by new users of the FAA Access to CPS Online site. While you do not mail SAIG-FAA User Statements to Federal Student Aid's Participation Management system, you must retain signed copies at your school.

All Primary DPAs and other FAA Access users at your school can obtain their FSA User IDs (if they have not already done so) by completing the FSA User ID enrollment process. For more detailed information on the FSA User ID creation process, see the [April 6, 2009 Electronic Announcement](#) posted on our IFAP Web site.

You can enter your TG Number, School Code, and Application Save/Restore Password (used for initial applications only) in EDEExpress FAA Access setup (**Tools, Setup, Global, FAA Access**) or enter them each time you connect to FAA Access to CPS Online through the FAFSA and Student Inquiry tabs in EDEExpress. You will be prompted separately for your FSA User ID and password, which are not stored in the EDEExpress database and must be provided each time you log in to FAA Access to CPS Online.

**Note:** You need Internet Explorer 11 or higher to access FAA Access to CPS Online using functions or links located in EDEExpress.

## How to Get EDEExpress and Documentation

You can download Release 1.0 and related user documentation from the IFAP Web site's "Software and Other Tools" page.

### EDEExpress Software

Instructions for downloading EDEExpress are located in the "Downloading Documentation and Software from the IFAP Web Site" section of the *Installation Guide for EDEExpress for Windows 2020-2021*.

**Note:** Some organizations restrict their employees from downloading programs from Internet sites. If you have trouble downloading, contact your technical support staff to ensure that you have full download rights.

### User Documentation

The most recent versions of user documentation can be downloaded from the IFAP Web site. These documents include:

- *EDEExpress for Windows 2020-2021 Installation Guide*
- *EDEExpress for Windows 2020-2021, Release 1.0 Desk Reference*
- Technical References

The 2020-2021 versions of the *EDE Technical Reference* and the *EDEExpress Packaging Technical Reference* provide technical guidance and record layouts for schools or other organizations that need to interface local software or mainframe systems with EDEExpress 2020-2021. The *EDEExpress Packaging Technical Reference* also contains worksheets you can use to help plan and implement your Packaging module setup in EDEExpress 2020-2021.

## Compatibility and Compliance

### Microsoft Windows Information

EDEExpress 2020-2021 is supported currently for the Microsoft Windows 7, Windows 8, and Windows 10 operating systems. For more information on minimal and optimal system recommendations, see the *EDEExpress 2020-2021 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.

### 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 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**. You can also send e-mail inquiries, comments, or suggestions to [CPSSAIG@ed.gov](mailto: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 [ed.gov/offices/OSFAP/services/fsatechsubscribe.html](http://ed.gov/offices/OSFAP/services/fsatechsubscribe.html).