

Custom Introduction

Sources of Assistance

If you have problems or questions, listed below are sources of assistance:

**The U.S. Department of Education
Direct Loan Task Force**

1-202/708-9951

Working hours are 7:00 a.m. - 5:00 p.m. (ET)

- Direct Loan Procedures and Operations

Direct Loan Accountability and Reconciliation Team

Working hours are 8:00 a.m. - 5:00 p.m. (ET)

1-202/708-9776

- Direct Loan Procedures and Operations
- Reconciliation and Cash Management Issues

Direct Loan Policy

1-202/708-8242

Working hours are 7:00 a.m. - 5:00 p.m. (ET)

- Policies

Direct Loan Custom/Combination Support 1-800/756-4220

E-mail: DLTS@NCS.COM

Fax: 1-703/284-5628

Working hours are 8:30 a.m. - 5:00 p.m. (ET)

- Direct Loan Technical Reference
- Direct Loan Record Layouts
- Combo/Mainframe Support for Direct Loans

CPS Customer Service 1-800/330-5947

E-mail: CPS@NCS.COM

Fax: 1-319/358-4260

Working hours are 7:00 a.m. - 7:00 p.m. (CT)

- Rejected EDE records and batches
- CPS Batch Status
- EDEExpress Software -- Application Processing, Packaging, SSCR and Direct Loan
- Pell Payment for Windows
- QAP Software (*See QAP Customer Service # for questions in the software*)
 - Installation
 - Hardware Configuration Issues
- AWARE Software
- EDE Technical Reference
- Renewal Application Processing
- Institutional/Agency Tape Support

Direct Loan Origination Center

1-800/848-0978

Working hours are 7:00 a.m. - 7:00 p.m. (ET)

- Direct Loan Batch Status
- Rejected Direct Loan Batches
- Batch Integrity Errors
- Promissory Notes
- Acknowledgments
- Check Sum Errors

Direct Loan Client Account Managers

Region I (CT, MA, ME, NH, RI, VT)	1-617/565-6911
Region II (NJ, NY, PR, VI)	1-212/264-8012
Region III (DC, DE, MD, PA, VA, WV)	1-215/596-1716
Region IV (AL, FL, GA, KY, MS, NC, SC, TN)	1-404/562-6259
Region V (IL, IN, MI, OH, WI)	1-312/886-8766
Region VI (AR, LA, NM, OK, TX)	1-214/767-9607
Region VII (IA, KS, MO, NE)	1-816/880-4090
Region VIII (CO, MN, MT, ND, SD, UT, WY)	1-303/844-3677 EXT 121
Region IX (AZ, CA, HI, NV)	1-415/437-8843
Region X (AK, ID, OR, WA)	1-206/287-9840

Title IV WAN Customer Service

1-800/615-1189

E-mail: T4WAN@NCS.COM

Fax: 1-319/339-6983

Working hours are 7:00 a.m. - 10:00 p.m. (CT)

- EDconnect, NET*CONNECT, and OPEnet software, (both DOS and Windows)
- Transmission Errors
- Network Password Changes and Resets
- EDE Enrollment and Participation
- Billing and Invoices
- Software and User Manual Distribution

NSLDS**1-800/999-8219***Working hours are: 7:00 a.m. - 7:00 p.m. (EST)*

- SSCR Assistance
- On-line NSLDS
- NSLDS Batch Status
- Perkins Data
- Rejected NSLDS Records

Federal Pell Grant Program Hotline**1-800/4-P-GRANT***Working hours are 8:30 a.m. - 5:30 p.m. (ET)***(1-800/474-7268)**

- Individual Record Rejects
- Year-to-Date Pell Payment Data Requests
- Pell DOS Software Support

Federal Pell Grant Program Institutional Access System*Working hours are 8:30 a.m. - 5:30 p.m. (ET)***1-800/4-P-GRANT****(1-800/474-7268)**

- Financial Information
- Document Requests
- Batch Processing Status
- Messages

The U.S. Department of Education Internet Address
#pell_system@ed.gov**The U.S. Department of Education/Direct Loan
and Pell Grant Organization Team Fax: 1-202/708-9700**

**Student Financial Aid Programs
Customer Service**

1-800/433-7327

E-mail: CSB @ED.GOV

Working hours are 8:30 a.m. - 4:00 p.m. (ET)

- Title IV Policy Questions
- SFA-BBS Student Financial Assistance
- Bulletin Board Services
- Help with Contacting Other Staff in the United States
- U.S. Department of Education

QAP Customer Service Support

1-202/260-4788

Working hours are 8:30 a.m. - 5:30 p.m. (ET)

- Software Requests
- Programmatic Questions and Software Support

Federal Student Aid Hotline

1-800/4-FED-AID or

Working hours are 8:00 a.m. - 7:00 p.m. (CT)

1-800/433-3243

- Student Financial Aid Program Questions
- NSLDS Borrower Tracking Questions
- Distribution of Selected Publications

Public Inquiry Contract

1-319/337-5665

Working hours are 8:00 a.m. - 7:00 p.m. (CT)

- Application Status
- Duplicate Student Aid Reports
- Address and School Changes

**FAFSA on the Web and FAFSA Express
Customer Service**

1-800/801-0576

E-mail: fafsa_admin@ncs.com

FAFSA on the Web page address: <http://www.fafsa.ed.gov>

FAFSA Express Web page address:
<http://www.ed.gov/offices/OPE/express.html>

Working hours are 7:00 a.m. - 10:00 p.m. (CT)

- FAFSA Express Software Assistance
- Application Status
- General Questions on Electronic Filing
- Help Accessing the Web Page

**The U.S. Department of Education Office of Post Secondary
Education (OPE)**

Web Page Address: <http://www.ed.gov/offices/OPE>

The U.S. Department of Education Direct Loan

Web Page: <http://www.ed.gov/offices/OPE/Direct Loan>

E-mail: Direct Loan @ED.GOV

Direct Loan Borrower Services

(Borrower Referral Only)

1-800/848-0979

Working hours are 8:00 a.m. - 8:30 p.m. (ET)

- *School delinquency report*

Direct Loan Central School Services

(School Referral Only)

1-800/445-7745

Working hours are 8:00 a.m. - 8:30 p.m. (ET)

- *School delinquency report*

System Options

The U.S. Department of Education has given schools maximum flexibility in fashioning a system solution that best meets their needs. Schools have three system options:

1. Custom System

Schools have the option of developing a system to support all the necessary tasks required to participate in the William D. Ford Federal Direct Loan program, or purchase a software package from a third-party servicer.

2. Combination EDEExpress/Custom System

Schools can choose to use a portion of the functions provided by EDEExpress in conjunction with external systems or software from another vendor. EDEExpress allows schools to import data captured in other on-campus systems (for example, a financial aid packaging system). Also, it enables schools to export data from its database needed by other systems (such as the institution's business office).

3. EDEExpress

EDEExpress is a comprehensive financial aid management system provided at no cost by the U.S. Department of Education. It is a student-based system which allows institutions to perform the following functions: process Federal application data, including loading and printing ISIRs received electronically from the CPS; compute student award packages; maintain funds; track file documents; generate reports; establish loan origination records; print promissory notes; calculate drawdown requests; manage disbursement data; reconcile funds; and report student enrollment data.

This technical reference addresses the needs of schools choosing Custom Systems or Combination Systems.

The following section addresses questions that may help the school to decide which system design option is best for them.

A video is also available to institutions that discusses the implementation of the Direct Loan program in a custom or combination system environment. You may request a copy by calling 1-800/4-FEDAID. The video is titled *Implementing a Custom Direct Loan Processing System*.

Items to Consider in Choosing a System Option

Loan Level Volume	How large is the volume of the loans the institution is processing?
Available Resources	How much of the following resources are available for the Direct Loan system: staff, data processing resources, equipment, and money?
Existing Systems	What existing systems are in place and how easy is it to integrate the Direct Loan system?
Time Constraints	Is there enough time available for a Direct Loan system to be developed?
Campus Communications	Are there existing means of communication between offices involved in the Direct Loan system? These offices could include financial aid, registrar, and bursars.
Video	<i>Implementing a Custom Direct Loan Processing System.</i> This video examines the options available for implementing the Direct Loan Program. This video is available by calling the Direct Loan Task Force or the 1-800/4FED-AID.

Custom Overview of Changes from 1997-98 to 1998-99

- ⇒ New Field - Batch Reject Code will be used in the Header Record for each batch that the Loan Origination Center rejects.
- ⇒ New Fields - Former Heal Loan. See Full Loan Origination Layout. Full Loan Origination Layout has increased to 537 bytes.
- ⇒ Direct Loan Reconciliation Process has been completely redesigned. The LOC now initiates the process.
- ⇒ The following Reconciliation fields have changed names: Reconciliation Status field replaced by Booked Status field, Reconciliation Date becomes Booked Date, Reconciliation Reject Reasons Code Table will now be shown as Disbursement Booking and Prom Note Booking Reject Codes.
- ⇒ All Reconciliation Layouts replaced by School Account Statement Layouts, Message Class (DSAS99OP).
- ⇒ Added Record Count Sequence Number to School Account Statement layouts - new requirement.
- ⇒ The following fields have been deleted from the Direct Loan Technical Reference:
 - Amount Reported
 - Cash Detail Year Indicator
 - Ending Cash Balance Amount
 - Error Flag (Origination Center)
 - Origination Center Total Net Loan Amount
 - Reconciliation Reject Codes
 - Total Adjusted Disbursement Status
 - Total Returns of Excess Cash Status
 - Cash Detail Reject Codes
 - Confirmation Code/Check Number
 - Ending Cash Balance Status
 - Origination Center Ending Cash Balance
 - Overall Reconciliation Cash Status
 - Reconciliation Status
 - Total Canceled Disbursements Status
 - Total Cash Receipts Status
- ⇒ Academic Year Start Date and Academic Year End Date is optional and will not be captured by the LOC in 98-99. This will be used in 99-2000.

⇒ The following information has been added to the Direct Loan Technical Reference:

- Batch Type to the Message Class Table.
- Loan Service Record Layout (DISV99OP).
- End Date to the Header Record.
- Redesigned Data Dictionary to include record length and special conditions for Combination Schools that interface with Express.
- Redesigned Record Layouts to include valid field content.
- Created new section for Custom Edits.
- New Field Added/Disbursement Acknowledgment Date to the Disbursement Record layout. The Disbursement Record Layout has increased to 145 bytes.
- Renamed Field - Promissory Note Acknowledgment Date. See Promissory Note Acknowledgment Layout.
- New Change Field Transmit Number:
 - * S110 - Former HEAL Loan
- Header Record for Loan Detail Export will include the batch type in the Batch Reject Code stating whether booked/unbooked loan detail records are being exported.

Loan Origination Options

The following describes the loan origination options available for institutions:

- Option 1 (Level 2): **Option 1** schools are responsible for all the functions associated with the Direct Loan Program except for drawdowns. The Loan Origination Center performs the drawdown for them and lets the school know via the Anticipated Disbursement Listing and the Actual Disbursement Roster the amounts to credit to students' accounts.
- Option 2 (Level 1): **Option 2** schools are responsible for performing all functions associated with the Direct Loan Program.
- Standard Origination (Level 3): **Standard Origination** schools are responsible for performing all functions associated with the Direct Loan Program except for the drawdowns (see Option 1) and printing the Stafford promissory notes. The LOC prints the Stafford promissory note and forwards it to the student. The promissory notes are returned directly to the LOC from the student.

The Department of Education provides schools participating in the Electronic Data Exchange (EDE) with EDEExpress, a PC package designed to print Institutional Student Information Records (ISIRs), as well as enter, edit and format application and correction data. EDEExpress has been expanded to include a financial aid packaging system and module designed to meet the needs of schools participating in the Direct Loan program. ~~In the remainder of this section, the hardware and interface requirements of the Combination approach are described.~~