

Overview

Preface

This technical reference is provided to postsecondary institutions participating in the U. S. Department of Education Pell Grant Program. It contains technical system information that allows you to either:

- Build your own system,
- Use a system provided by another organization (for example, a vendor or third-party servicer), or
- Use EDEExpress (the software package provided by the U.S. Department of Education) in combination with your own system or vendor provided software.

The Pell Grant Technical Reference for 1999-2000 is organized into the following three sections:

Overview

- Preface
- Sources of Assistance
- System Options
- Items to Consider in Choosing a System Option
- PC Requirements

Introduction

- Intro to New RFMS
- RFMS Software
- Pell Authorization
- Origination Records
- Origination Acknowledgment
- Disbursement Records
- Disbursement and Special Disbursement Acknowledgments
- Multiple Reporting Record
- Year-To-Date Record

Custom

- Record Layouts

Combination

- Combination Layouts

All schools should read the Overview section. It contains important phone numbers to call for assistance, as well as information to help you choose how you want to participate electronically in the program.

If you choose to use a custom system, read the Custom section thoroughly. It provides you with essential record layouts pertinent to building your own system.

If you choose to use a combination of systems, read the Combination section thoroughly, as it provides you with essential records layouts pertinent to using a combination of systems.

See the following section, Sources of Assistance, for additional resources of help.

Sources of Assistance

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

CPS Customer Service **800/330-5947**

Telecommunications Device for the Deaf (TDD/TTY) **800/511-5806**

E-mail: cps@ncs.com

SFA Technical Support: <http://www.ed.gov/offices/OSFAP/sfatech/listserv.html>

Fax: 319/358-4260

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

- Custom/Combo/Mainframe Support
- CPS Batch Status
- Direct Loan Record Layouts
- Direct Loan Technical Reference
- EDE Technical Reference
- FISAP Technical Reference
- Packaging Technical Reference
- EDEExpress Software — App Express Processing, Packaging, Direct Loan, and Pell Payment
- Packaging Technical Reference
- QAP Software
- SSCR-32 Software
- SSCR Technical Reference
- Renewal Application Processing
- Rejected EDE records and batches
- Use of CPS On-line Query

Direct Loan Client Account Managers

Region I (CT, MA, ME, NH, RI, VT)	617/565-6911
Region II (NJ, NY, PR, VI)	212/264-8012
Region III (DC, DE, MD, PA, VA, WV)	215/656-5929
Region IV (AL, FL, GA, KY, MS, NC, SC, TN)	404/562-6259
Region V (IL, IN, MI, OH, WI)	312/886-8766
Region VI (AR, LA, NM, OK, TX)	214/880-2405
Region VII (IA, KS, MO, NE)	816/880-4090
Region VIII (CO, MN, MT, ND, SD, UT, WY)	303/844-3677
	EXT 121
Region IX (AZ, CA, HI, NV)	415/556-4201
Region X (AK, ID, OR, WA)	206/287-9840

Direct Loan Consolidation Center **800/557-7392**

ED Direct Loan Consolidation Information Page Web site address:

http://www.ed.gov/Direct_Loan/consolid.html

Direct Loan Consolidation Information Center Web site address:

<http://www.loanconsolidation.ed.gov>

Direct Loan Consolidation Information Center E-Mail address:

loan_consolidation@mail.ed.gov (can only be accessed from icon at Information Center Web site labeled "Contact Us")

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

Direct Loan Operations Staff **202/708-9951**

E-Mail: direct_loans@ed.gov

- *Direct Loan Procedures and Operations*

Web site address: <http://www.ed.gov/DirectLoan>

Working hours are 7:30 a.m. – 4:30 p.m. (ET)

Direct Loan Origination Center **800/848-0978**

E-mail: loan_origination@mail.ed.gov

Fax: 800/557-7396

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

- Acknowledgements
- Batch Integrity Errors
- Check Sum Errors
- Direct Loan Batch Status
- Implementation Guide Questions
- Interface Issues
- Promissory Notes
- Rejected Direct Loan Batches

Direct Loan Servicing Center **800/848-0979**
(Borrower Referral Only)

Telecommunications Device for the Deaf (TDD/TTY) **800/848-0983**

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

Web site address: <http://www.dlServicer.ed.gov>

Fax: 800/848-0984

School Services **888/877-7658**

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

- Delinquency Issues
- Interface Issues

FAFSA on the Web and FAFSA Express
Customer Service **800/801-0576**

E-mail: FAFSAWeb@ncs.com

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

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

PIN Web site address: <http://www.pin.ed.gov>

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

- FAFSA on the Web, Renewal App on the Web, and Correction on the Web Assistance
- FAFSA Express Software Assistance
- Application Status
- General Questions on Electronic Filing
- Help Accessing the Web Page

Federal Pell Grant Program **800/4-P-GRANT or**
800/474-7268

Fax: (301) 548-2396

E-mail: #pell_systems@ed.gov

Website: www.pellgrantsonline.ed.gov

IFAP Website: www.ifap.ed.gov

The SFATECH Website can be accessed directly from the IFAP Website.

Working hours are 8:00 a.m. - 8:00 p.m. (ET) Monday through Friday

Customer Service

- Batch Processing Status and Rejected Batches
- Current Authorization Level
- General Inquiries concerning RFMS
- Information and Data Request Regarding Award Years Prior to 1999-2000
- Pell Grant Web Page Questions

WEB PAGE

- Authorization Level for 1999-2000, 2000-2001
- Batch Status for 1999-2000, 2000-2001
- Links to Pell Resources

**Federal Student Aid Information Center
or**

**800/4-FED-AID
800/433-3243**

Telecommunications Device for the Deaf (TDD/TTY)
Working hours are 8:00 a.m. - 8:00 p.m. (ET)

800/730-8913

- Application Status
- Distribution of Selected Publications
- Duplicate SARs or Address and School Changes
(Student Only)
- NSLDS Borrower Tracking Questions
- Student Financial Aid Program Questions

319/337-566

**Grant Administration and Payment System
(GAPS)**

888/336-8930

Web site address: <http://gapsweb.ed.gov>

Working hours are 8:00 a.m. – 7:00 p.m. (ET)

National Student Loan Data System (NSLDS) 800/999-8219

Web site address: www.nsls.ed.gov

E-Mail address: SFAMAIL@NCS.ed.gov

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

- NSLDS Batch Status
- Online NSLDS
- Perkins Data
- Rejected NSLDS Records
- SSCR Assistance

Direct Loan Policy**202/708-8242**

Working hours are 7:00 a.m. - 4:00 p.m. (ET)

- Policies
- Regulations

Title IV WAN Customer Service**800/615-1189**

E-mail: t4wan@ncs.com

Fax: 319/339-6983

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

- Billing and Invoices
- Campus-Based Award Letter
- EDconnect
- EDE Enrollment and Participation
- Network Password Changes and Resets
- Software and User Manual Distribution
- Transmission Errors

Universal Automation Labs (UAL)**301/565-0032**

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

Fax: 301/565-0613

- FISAP Edit File
- Replacement Year-to-Date File

For FISAP-related operational/procedural questions, call the U.S. Department of Education at 202/708-7741

Fax: 202/260-0522 or 202/401-0387

Note: Telephone numbers are subject to change.

System Options

The U.S. Department of Education gives you maximum flexibility in fashioning a system solution that best meets your institution's needs and loan origination options. There are three system options:

1. Custom System

You have the option of developing a system to support all the necessary tasks required to participate in the Federal Pell Grant Program, purchasing a software package from a third-party servicer, or contracting a third-party servicer.

2. Combination EDEExpress/Custom System

You can choose to use a portion of the functions provided by EDEExpress in conjunction with external systems or software from another vendor. EDEExpress allows you to import data captured in other on-campus systems (for example, a financial aid packaging system). Beginning in 2000-2001, it will also enable you to export data from the EDEExpress database needed by other on-campus 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 that allows you to perform functions, such as processing Federal application data, including loading and printing Institutional Student Information Records (ISIRs) received electronically from the Central Processing System (CPS). It also computes student award packages; maintains funds; tracks file documents; generates reports; establishes loan origination records; prints promissory notes; manages disbursement data; reconciles funds; and reports Federal Pell Grant payment data.

The following section addresses questions that may help you decide which system design option is best for your institution.

Items to Consider in Choosing a System Option

Grant Volume	How large is the grant volume at your institution?
Available Resources	How much of the following resources are available: staff, data processing resources, equipment, and money?
Existing Systems	What existing systems are in place and how easy is it to integrate?
Time Constraints	Is there enough time available for a system to be developed?
Campus Communications	Are there existing means of communication between offices involved in the Pell Grant program? (These offices could include financial aid and bursars.)

If you participate in the Electronic Data Exchange (EDE) with EDEExpress, the Department of Education provides personal computer (PC) software designed to manage financial aid processing, including the Pell Grant Program. Modules in EDEExpress include Application Processing, Packaging, Direct Loan, and Pell Payments. The remainder of this section describes the hardware and interface requirements of the Combination EDEExpress Custom System option.

PC Requirements

For the highest efficiency and processing speeds, the recommended configuration should be followed. If you are planning an equipment purchase to participate in the Federal Pell Grant Program, the following list describes the minimum required configuration:

Processor	IBM-compatible PC with a Pentium 200 MHz or comparable
Keyboard	Windows 95 Keyboard
Microsoft Windows	Windows95, Windows 98, or Windows NT 4.0 or above
Available hard disk space	4.0 GB SCSI Hard Drive
RAM	64 MB RAM
Printer	Laser printer capable of printing on standard paper (8.5 x 11)
Modem	56K Analog Modem
Mouse Driver	Microsoft-compatible
Tape Back-up Unit	Capacity should equal the size of the stored data.
CD-ROM	12x CD ROM Drive with Sound Board*
Floppy Disk Drive	3.5" high-density/1.44 MB Disk Drive
Monitor and Video Card	800 X 600 Super VGA

*Required if institutions want to use the EDEExpress tutorial.

Note: A backup of EDEExpress should be performed on a regular basis. Make sure your backup can be restored.

If you are running EDEExpress on a local area network (LAN), refer to the EDEExpress Installation Guide for LAN Hardware and Software recommendations.

Interface Requirements

EDEExpress interfaces with other ED-provided software modules and systems resident on the same PC, with other systems at the institution, and via the Student Aid Internet Gateway (SAIG).

Interface with other ED-provided Software Systems on PC

EDEExpress includes modules for Application Processing, Packaging, Direct Loan, and Pell. You can import ISIRs from the Application Processing module to create Pell Grant records. However, each record requires manual entry (or import change) before the record can be originated. Alternatively, you can import packaged student records from the Packaging module of EDEExpress to create Pell origination records. EDEExpress uses the award amounts calculated in the Packaging module to establish the grant records in the Pell module.

The Student Aid Internet Gateway (SAIG) communications software, EDconnect, can coexist on the same PC with EDEExpress. EDconnect is a window's software package that participants use to transmit data across the network to the RFMS systems. EDconnect is compatible with the LAN; however, care should be taken when using EDconnect in a LAN environment because of its lack of file and record-locking capabilities.

Interface with other Software Systems on Campus

Your other institutional computer systems, used for registration or accounting, are potential providers of data to the EDEExpress Pell Grant Software. EDEExpress is designed to import data captured in these other systems that has been reformatted according to specifications provided in this technical reference.

Likewise, data in EDEExpress is of potential use to other on-campus systems. Therefore, the system provides you with the ability to export data. 1999-2000 Record Layouts for the export files are provided so your institutional systems can be modified.

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