



**Electronic Access Conference**  
*emagine*  
2001

**Student Financial Assistance**

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THE U.S. Department of  
**EDUCATION**



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## Session 58

# *Effective Techniques for Using EDExpress Packaging (Hands On)*



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# *Introduction*

- This session is designed for beginning or novice users of EDExpress Packaging
- Evaluations
- Questions



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## *What is Packaging?*

- Efficient, flexible method of awarding funds to student records and generating award letters
- Interacts with Apps, Pell and Direct Loan modules
- Can import data from and export data to external system(s)



# Agenda

- Setup Planning
- Packaging Setup Basics
- Creating Records
- The Package Process
- Printing Award Letters
- Hands-on Exercises



# Setup Planning

- Identify your office needs and assess what you need Packaging to do for you
- Gather all relevant information on available funds, awarding schemes, COA for different student groups
- Write it out --- use Packaging setup sheets



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# *Academic Year Profile*

- Determines how awarded fund totals are split between terms
- Defines how Pell is awarded: select formula type, percentages
- Required for ISIR import



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## *Fund Maintenance*

- Create fund profile for each federal, state, local or private aid source to be awarded
- Use queries and Remaining Need to restrict awarding
- Use correct aid type!



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## *Award Methodologies*

- Tell EDEExpress how to award defined funds to different student groups
- Use Priority field and queries to filter methodologies
- Use Self-help, Gift-aid limit fields to set award ceiling for certain aid types



# Budgets

- Establish Cost of Attendance amounts for different student populations
- Assign either during ISIR import or from Process menu
- Use Priority and queries to control assignment
- Establish a Pell COA if desired (new for 2002-2003)



# Creating Records

- ISIR import
  - Will only import valid ISIR data
  - Most time-efficient, accurate method
- Manual entry
- External import add



# *Packaging Records*

- Package from Awards tab or Globally
- Will award Pell first, then run through methodologies in priority order
- View Awarded Funds screen to examine results of Package process
- Unpackage/Repackage functions



# *Award Letters*

- Print Globally or from Awards tab
- Record must have fund(s) awarded
- Offer and Notification letter options
- Some letter text can be modified



# Hands-On Exercises



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## *SFA Tech*

We appreciate your feedback and comments. We can be reached:

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