



# **Electronic Access Conference** **2000 GET CONNECTED**



We Help Put America  
Through School

## Student Financial Assistance

---



## ***Session 22***

# ***What's New for EDExpress/Combination Systems***



We Help Put America  
Through School



# *Introduction*

- Who is this session geared for?
- Evaluations
- Questions



We Help Put America  
Through School

# *Agenda*

- New/Updated Processes
- EDEExpress Enhancements
- New/Modified Fields
- Updates to Combination Record Layouts
- Updates to EDEExpress/Combination Edits
- Summary



# ***New/Updated Processes***

- Importing ISIR MPN Indicator
- Processing MPNs/DL Setup
- Linking Loan to MPN
- Implementing Up-front Interest Rebate
- Entering Disbursements
  - Actual Disbursements
  - Adjustments



# *Importing ISIR MPN Indicator*

- **MPN Indicator Imported on ISIR**
  - Indicates MPN Status at LOC at time ISIR is created
  - Views from Loan tab under View/NSLDS
  - Imports from or exports to external systems
  
- **Valid Values of MPN Indicator**
  - A - Valid MPN at LOC
  - N - No MPN on File at LOC
  - C - All MPNs on File have been closed
  - I - All MPNs on File are inactive
  - U - Unavailable



# *Processing MPNs/ DL Setup*

## ■ New Field in DL Setup

– “Do you use multi-year MPNs at your school?”

- Multi-year Functionality - Checked Box = Yes
- Single-year Functionality - Blank Box = No
- Default is “No”





# *Linking Loan to Master Promissory Note Status*

- Linking moved
  - from Print Function
  - to Origination Function
- Linking occurs on all origination methods
  - Loan Tab (manually)
  - Packaging Data Import
  - External Loan Origination Import Add



We Help Put America  
Through School

continued



# *Linking Loan to Master Promissory Note Status*

## ■ Multi-Year Processing Schools

- Linking based on MPN Status of other Sub/Unsub Loans in EDEExpress

OR

- Linking based on status of ISIR MPN Indicator imported into EDEExpress
- Upon linking, MPN status is updated appropriately



We Help Put America  
Through School

continued



# *Linking Loan to Master Promissory Note Status*

- Single-Year Processing Schools
  - Based on MPN Status of other Sub/Unsub Loans
    - for same student
    - for same academic year
  - Upon linking, MPN status of the new loan is updated appropriately
  - Linking NOT based on status of an imported ISIR MPN Indicator



We Help Put America  
Through School



# ***Implementing Up-front Interest Rebate***

- New Field in DL System Setup
  - Sub/Unsub Interest Rebate %
  - PLUS Interest Rebate %
- New Interest Rebate % Change Field (S193)
- Interest Rebate Amount Field
  - Anticipated Disbursements
  - Actual Disbursements



We Help Put America  
Through School

continued



# *Implementing Up-front Interest Rebate*

- Interest Rebate calculated at the disbursement level
- Business rules, calculation logic and examples on SFA Download
  - [www.sfadownload.ed.gov](http://www.sfadownload.ed.gov)
  - Sections 3 and 7 DL Tech Ref



We Help Put America  
Through School

# *Entering Actual Disbursements*

## ■ New Field in DL System Setup

### – Actual Disbursement Type

- Indicates method used by School to enter actual disbursements

### – Valid Value

G - School enters Gross Actual Disbursement Amount

N - School enters Net Actual Disbursement Amount



# *Entering Actual Disbursements*

## ■ Modified Disbursement Action Types:

D = Disbursement (replaced “G” and “N”)

U = Copy Anticipated Disbursement

Q = Adjusted Disbursement Date

A = Adjustment (replaced “J” and “A”)

N = Net Adjusted Amount

## ■ Affects External Export process



# *Entering Adjustments*

- **New Option -**
  - Enter the Net Adjusted Disbursement Amount (difference)
- **Net Adjusted Disbursement Amount**
  - Can be negative (downward adjustment) or positive (upward adjustment)



# *Exporting Adjustments*

- Calculated and exported to the LOC
  - Gross disbursement
  - Loan fee
  - Interest rebate
  - Net disbursement amounts
- NOT sent to LOC and no longer field in LOC Disbursement record layout
  - Net Adjusted Disbursement Amount (difference)



# ***EDExpress Enhancements***

- Displaying and entering data on Loan tab
- Combining Fields for MPN/Promissory Note Status
- Displaying data on Disbursement tab
- Updating List and Measurement Tool Reports
- Enhancing MPN Disclosure Statement





## *Displaying and Entering Data on Loan Tab*

- Rearranged fields on Loan tab
  - Pre-filled fields display first
  - Fields display based on loan type
  - Data entry more efficient
- Example: the following slide demonstrates new look for unsubsidized loan tab

**Note:** Loan Amount Requested is a PLUS only field



We Help Put America  
Through School



2001 - 2002 EDExpress for Windows - [(111-11-1111)]

File Record Process View Help

+ < > ...

<b>Borrower Loan Information:</b> School Code: <input type="text" value="G03744"/> ... UNIVERSITY OF RICHMOND Loan Period Code: <input type="text" value="01"/> ... Loan Period: <input type="text" value="09/01/2001"/> to <input type="text" value="05/10/2002"/> Academic Year: <input type="text" value="09/01/2001"/> to <input type="text" value="05/10/2002"/> Dependency Status: <input type="text" value="D"/>		<b>Promissory Note Information:</b> MPN Status: <input type="text"/> Print Ind: <input type="text" value="0"/> Print Date: Manifest Batch #: Signed Note Received: <input type="text"/> <input type="checkbox"/> Manifest Date:	
Loan Amount Approved: <input type="text"/> Borrower's Default Loan/Grant Overpayment: <input type="text"/>		<b>Loan Information:</b> Origination Date: Status: Origination Rejection Codes: Trans #: Origination Batch #: LOC: Last Change Batch #: Export to External System: <input type="text"/> <input type="checkbox"/> Inactive Loan? Inactive Loan Date: <input type="text"/> <input type="checkbox"/> LOC Total Net Amt: LOC Total Net Amount Date: Disclosure Statement Print Indicator: <input type="text" value="S"/> Fee Percentage: <input type="text"/> <input type="checkbox"/> Disclosure Printed Rebate Percentage: <input type="text"/> Record Source: M	
Add'l Unsub Eligibility for Dependent Student? <input type="checkbox"/> Add'l Unsub Eligibility for Health Profession Programs? <input type="checkbox"/> College Grade Level: <input type="text"/> Created By: Last Updated By:		<input type="button" value="Transmit #'s ..."/>	
Loan ID: 11111111U02G03744001 1 of 1			

For Help, press F1 | C:\PROGRAM FILES\EDESUITE\DEXPRESS FOR WINDOWS 2001-2002\expre: | NUM





# ***Combining Fields for MPN/Promissory Note Status***

- Combine MPN/Promissory Note fields into one field
- Eliminated separate fields
  - Student signed
  - Parent signed
- Arranged fields in chronological order





2001 - 2002 EDExpress for Windows - [(111-11-1111)]

File Record Process View Help

+ < > ...

<b>Borrower Loan Information:</b> School Code: <input type="text" value="G03744"/> ... UNIVERSITY OF RICHMOND Loan Period Code: <input type="text" value="01"/> ... Loan Period: <input type="text" value="09/01/2001"/> to <input type="text" value="05/10/2002"/> Academic Year: <input type="text" value="09/01/2001"/> to <input type="text" value="05/10/2002"/> Dependency Status: <input type="text" value="D"/>		<b>Promissory Note Information:</b> MPN Status: <input type="text"/> Print Ind: <input type="text" value="0"/> Print Date: Manifest Batch #: Signed Note Received: <input type="text"/> <input type="checkbox"/> Manifest Date:	
Loan Amount Approved: <input type="text"/> Borrower's Default Loan/Grant Overpayment: <input type="text"/>		<b>Loan Information:</b> Origination Date: Status: Origination Rejection Codes: Trans #: Origination Batch #: LOC: Last Change Batch #: Export to External System: <input type="text"/> <input type="checkbox"/> Inactive Loan? Inactive Loan Date: <input type="text"/> <input type="checkbox"/> LOC Total Net Amt: LOC Total Net Amount Date: Disclosure Statement Print Indicator: <input type="text" value="S"/> Fee Percentage: <input type="text"/> <input type="checkbox"/> Disclosure Printed Rebate Percentage: <input type="text"/> Record Source: M	
Add'l Unsub Eligibility for Dependent Student? <input type="checkbox"/> Add'l Unsub Eligibility for Health Profession Programs? <input type="checkbox"/> College Grade Level: <input type="text"/> Created By: Last Updated By:		<input type="button" value="Transmit #'s ..."/>	
Loan ID: 11111111U02G03744001 1 of 1			

For Help, press F1 | C:\PROGRAM FILES\EDESUITE\DEXPRESS FOR WINDOWS 2001-2002\expre: | NUM





# Combining Fields for MPN Status

## ■ MPN Status values:

N = Not Ready to Print

R = Ready to print

P = Printed or request to print sent to LOC

**S = Signed & returned** (available when current value is P; can be updated)

M = Manifested

A = Accepted by the LOC

continued



We Help Put America  
Through School

# Combining Fields for MPN Status

- MPN Status values:

X = Pending at LOC

F = MPN Not on file

I = MPN Inactive

C = MPN Closed

Q = MPN rejected

**T = School assumes MPN Exists** (available when current value is N, R, P, S or M; can be updated)





# *Combining Fields for Promissory Note Status*

## ■ PLUS Promissory Note Status values:

N = Not Ready to Print

R = Ready to Print

P = Printed or Request to print sent to LOC

**S = Signed** (Can be updated)

M = Manifested

A = Accepted

X = Pending

E = Error



We Help Put America  
Through School



## *Displaying Data on Disbursement Tab*

- The following Loan tab fields have been duplicated on the Disbursement tab:
  - Loan Amount Approved
  - Loan Status
  - MPN Status or Promissory Note Status (PLUS)



We Help Put America  
Through School



# *Updating List Reports and Measurement Tools*

- Updated all reports to consistent format
  - Student's name prints first then PLUS borrower's name, if applicable
  - Students name prints only once even if student has multiple loans listed (Loan ID and Batch ID repeat)
  - Space allotted for a 12 character first name
- Expanded to two promissory note reports
  - Master Promissory Note Measurement Tool
  - PLUS Promissory Note Measurement Tool



We Help Put America  
Through School

continued



# ***Updating List Reports and Measurement Tools***

- Added a new report
  - Disbursement Profile List
- Eliminated reports
  - Batch Regeneration Measurement Tool
  - Loan Origination Measurement Tool
  - Origination Change Measurement Tool
  - List Cash Report
- Combined reports
  - Batch Activity List and Batch Activity Measurement Tool



We Help Put America  
Through School

# *Disclosure Statement*

- Disclosure Statement prints Loan totals
  - Total Anticipated Gross Amount
  - Total Anticipated Fee Amount
  - Total Anticipated Interest Rebate Amount
  - Total Anticipated Net Amount
  
- Disclosure Statement prints
  - Anticipated Disbursement Date and Net Disbursement Amount for up to 20 disbursements



# ***New/Modified Fields***

- Student College Grade Level
- Permanent and Local Address
- First Name
- E-mail Address



# *Student College Grade Level*

## ■ Student's College Grade Level

- 0 = 1st Year, never attended college
- 1 = 1st year, attended college before
- 2 = 2nd year/sophomore
- 3 = 3rd year/junior
- 4 = 4th year/senior
- 5 = 5th year or more undergraduate
- 6 = 1st year graduate/professional
- 7 = Graduate/professional or beyond



# *Permanent and Local Address*

- Permanent and Local Address
  - Increased field length from 28 to 35 bytes
  - Affects Change fields (S009) and (S100)
- Student's Local Address
  - Increased field length from 28 to 35 bytes
  - Affects Change field (S100)



## *First Name*

- Student or Parent Borrower's First Name
  - Increased field length from 9 to 12 bytes
  - Affects Change field (S006)
- Student's First Name (for PLUS)
  - Increased field length from 9 to 12 bytes
  - Affects Change field (P003)



# *E-mail Address*

- Student's E-mail Address
  - Optional 50 byte field
  - Valid field content includes:
    - Uppercase and lowercase A-Z
    - All symbols and numbers
    - @ and a "." (dot) to the right of the @ character is required if address provided
  - Change Field (S126)



# *Updates to Combination Record Layouts (Section 5)*

- External Import Add
- External Import Change
- External Export





## ***External Import Add File (DIEA)***

- Record length increase to 401 bytes
- New field
  - Student's E-mail Address
- Modified Fields
  - Student or Parent Borrower's First Name
  - Student First Name (for PLUS)
  - Permanent and Local Address
  - Student's College Grade Level



We Help Put America  
Through School

continued

## *External Import Add File (DIEA)*

### ■ Redefined Fields

#### – Program Year

- Formerly called Loan Year

#### – Additional Unsubsidized Eligibility for Health Profession Programs

- Formerly called HEAL

#### – Loan Default/Grant Overpayment

- Formerly called Default on Education Loans



## *External Import Add File (DIEA)*

- Redefined Fields
  - Loan Amount Requested
    - Changed to a PLUS only field
    - Affects Change field (S028)
  - MPN Exist
    - Eliminated field
    - Included as an **MPN Status**
    - T = School assumes student has an MPN on file at LOC



# *External Import Change (DIEC)*

- Increased Record Length to 579
- Increased Value 01 - 10 fields to 50 bytes
- Added new Change fields:
  - D008 - Actual First Disbursement Change Flag
  - S126 - Student's E-mail Address
  - S193 - Interest Rebate Percentage
  - S104 - Borrower's Permanent Address Change Date
  - S105 - Student's Local Address Change Date
  - S106 - Borrower's Social Security Number Change Date
  - S107 - Borrower's Date of Birth Change Date



# ***External Import Change (DIEC)***

## ■ **Removed Change Fields**

**S023 - Borrower's Signed Note**

**S194 - Promissory Note Accepted Loan ID (MPN ID)**

## **All Disbursement Refund Codes**

S044, S054, S064, S074, S132, S136, S140, S144, S148, S152,  
S156, S160, S164, S168, S172, S176, S180, S184, S188, S192

## **All Disbursement Refund Dates**

S045, S055, S065, S076, S133, S137, S141, S145, S149, S153,  
S157, S161, S165, S169, S173, S177, S181, S185, S189, S193

continued



# *External Import Change (DIEC)*

## ■ Redefined Change Fields

### S115 - **Disclosure Statement Print Indicator**

New value is Z = LOC reprints

### S117 - **MPN Status** formerly MPN Exists

Values are:

T = assumes MPN

N = assumes no MPN

S = MPN is signed

### S028 - **Loan Amount Requested** is PLUS only



## ***External Exports (DEER)***

- Removed columns displaying
  - Field Numbers
  - Start and End Positions
- Increased field length
  - First Name
  - Local Address
  - Permanent Address
  - Parent's First Name
  - Parent's Permanent Address

continued



# ***External Exports (DEER)***

## ■ Added New Fields

- Student's E-mail Address
- ISIR MPN Indicator
- Actual First Disbursement Change flag  
(C = Changed first actual disbursement or can be blank)

## ■ Updated Field Names

- Additional Unsubsidized Eligibility for Health Profession Programs
- Program Year
- Student's Loan Default/Grant Overpayment
- Parent Borrower's Loan Default/Grant Overpayment



# *External Exports (DEER)*

## ■ Removed fields

- Borrower Signed Note
- Student Signed Note (PLUS)
- Parent Borrower's Original SSN
- Professional Judgement
- Promissory Note to be on Manifest
- MPN Exists
- Refund Code
- Refund Date



# *External Exports (DEER)*

- Redefined Fields
  - Disclosure Statement Print Indicator
    - Added value of Z = LOC reprints
  - Promissory Note/MPN Status
    - Added new values
  - Student Grade Level
    - Updated values
  - Loan Amount Requested
    - Updated to a PLUS only field



# *Updates to EDExpress/Combination Edits (Section 6)*

- Edits that have been removed
- Edits that have been modified
- Edits that are new



# ***EDExpress Edits***

## ■ Removed Edits

**1056** - Student Signed Note

**1080** - Borrower Signed Note

**1106** - Borrower's Alien Registration Number  
(If Alien Registration Number is non-blank and citizenship status is 1)

**3020** - Disbursement Refund Date

**3030** - Disbursement Refund Code





# ***EDExpress Edits***

## ■ Modified Edits

**1055** - Loan Amount Approved edit with new student grade level values

**1085** - Borrower Signed Note edit to Promissory Note Status and MPN Status



We Help Put America  
Through School

continued

# ***EDExpress Edits***

## ■ New Edits

### **4001 - Student Current SSN**

If parent current SSN equals student current SSN

### **4002 - Anticipated Detail Fields**

If only one anticipated disbursement and the school is not designated as a Special School in DL Setup





## ***2001-2002 Direct Loan Technical Reference***

- Draft of the 2001-2002 Direct Loan Technical Reference is currently on SFA download and includes
  - Implementation of the Up-front Interest Rebate
  - Implementation Guide
  - Appendices



We Help Put America  
Through School

continued



---

## ***2001-2002 Direct Loan Technical Reference***

- Final 2001-2002 Direct Loan Technical Reference is being published by the end of November
- Available electronically on the Department of Education's SFAdownload Site

[www.sfadownload.ed.gov](http://www.sfadownload.ed.gov)



We Help Put America  
Through School



# ***DL Tools Out-of-the-Box***

- Rebuild Database
- Compare Program
- Cash Management



We Help Put America  
Through School

## *Further Assistance*

- With content of the Combination Sections of the Direct Loan Technical Reference
  - EDEExpress Record Layouts used to interface with other external systems
  - EDEExpress Direct Loan Edits
  - EDEExpress Direct Loan List Reports and Measurement Tool Reports





## *Further Assistance*

- **CPS Customer Service**
  - 800/330-5947
  - Email [CPS@NCS.COM](mailto:CPS@NCS.COM)



We Help Put America  
Through School



Electronic Access Conference  
2000 GET CONNECTED



# Questions?



We Help Put America  
Through School