



**Electronic Access Conference**

**2002**

THE U.S. Department of  
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## *Session 39*

# *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)



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# *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



# Academic Year Profile

2002 - 2003 EDExpress for Windows

File Process Tools Help

Academic Year Profile - locked. 1 student(s) assigned.

Code:  Default:  User Modified: SYSADMIN Date Modified: 10/10/2002

Title:

Pell Grant Formula:

Program Proration Percent:  EFC program length to import from the ISIR database:

#	Term	Enrollment Status	Pell %	FSEOG %	Grant %	Perkins %	WS %	Subsidized Loan %	Other Loan %
1	FALL	FULL TIME	AUTO	50.00	50.00	50.00	50.00	50.00	50.00
2	SPRING	FULL TIME	AUTO	50.00	50.00	50.00	50.00	50.00	50.00
3									
4									
5									

1 of 1

Add Delete Save Retrieve...

OK Cancel Help

For Help, press F1 C:\Program Files\EDSuite\EDExpress for Windows 2002-2003\expres23.mdb NUM



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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 the correct Aid Type

# Fund Maintenance

2002 - 2003 EDExpress for Windows

File Process Tools Help

Setup

**Fund Maintenance**

User Modified: SYSADMIN Beginning Balance: \$99,999,999

Date Modified: 09/26/2002 Adjustment to Beginning Balance: \$0

Fund Code: PELL\_\_\_\_\_ Funds Awarded: \$0

Fund Description: FEDERAL PELL GRANT\_\_\_\_\_ Current Balance: \$99,999,999

Aid Type: F Do not remove if unpackaged?  Remaining Need

Criteria: \_\_\_\_\_

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Add Delete Save Retrieve...

OK Cancel Help

Close Help

For Help, press F1 C:\Program Files\EDSuite\EDExpress for Windows 2002-2003\expres23.mdb NUM



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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

# Award Methodologies

2002 - 2003 EDEExpress for Windows

File Process Tools Help

Award Methodology

Code:  User Modified: SYSADMIN Date Modified: 10/10/2002

Title:

Priority:   Use Percentages:  Use Dollar Amount

Self-Help Aid Maximum:  % Gift Aid Maximum:  %

Criteria:  ...

#	Fund Code	Fund Priority	School Min	School Max	Min EFC	Max EFC	Remaining Need
1	GRANT	1	50	500	0	1500	Values
2	PERKINS	2	200	2000	0	1000	Values
3	WORK	3	50	5000	0	5000	Values
4	SUB	4	100	99999	0	99999	Values
5	UNSUB	5	100	99999	0	99999	Values
6							Values

1 of 1

Add Delete Save Retrieve...

OK Cancel Help

For Help, press F1 C:\Program Files\EDSuite\EDExpress for Windows 2002-2003\expres23.mdb NUM



## *Budgets*

- Establish Cost of Attendance (COA) 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

# Budgets

2002 - 2003 EDExpress for Windows

File Process Tools Help

Budgets - locked. 1 student(s) assigned.

User Modified: SYSADMIN Date Modified: 10/10/2002

Budget Code: FULL Priority: 1 Budget Total: 10,329 Pell COA \$ 10,329

Title: FULL YEAR FIRST YEAR STUDENT

Criteria: ...

Budget Amounts		User Defined Budget Amounts	
Tuition and Fees :	\$ 6,500	HEALTH FEES	\$ 100
Loan Fees:	\$ 79	COMPUTER FEES	\$ 150
Room and Board :	\$ 2,500		\$ 0
Books and Supplies :	\$ 500		\$ 0
Transportation Cost :	\$ 0		\$ 0
Miscellaneous :	\$ 500		

1 of 1

Add Delete Save Retrieve...

OK Cancel Help

For Help, press F1 C:\Program Files\EDESuite\EDExpress for Windows 2002-2003\expres23.mdb NUM

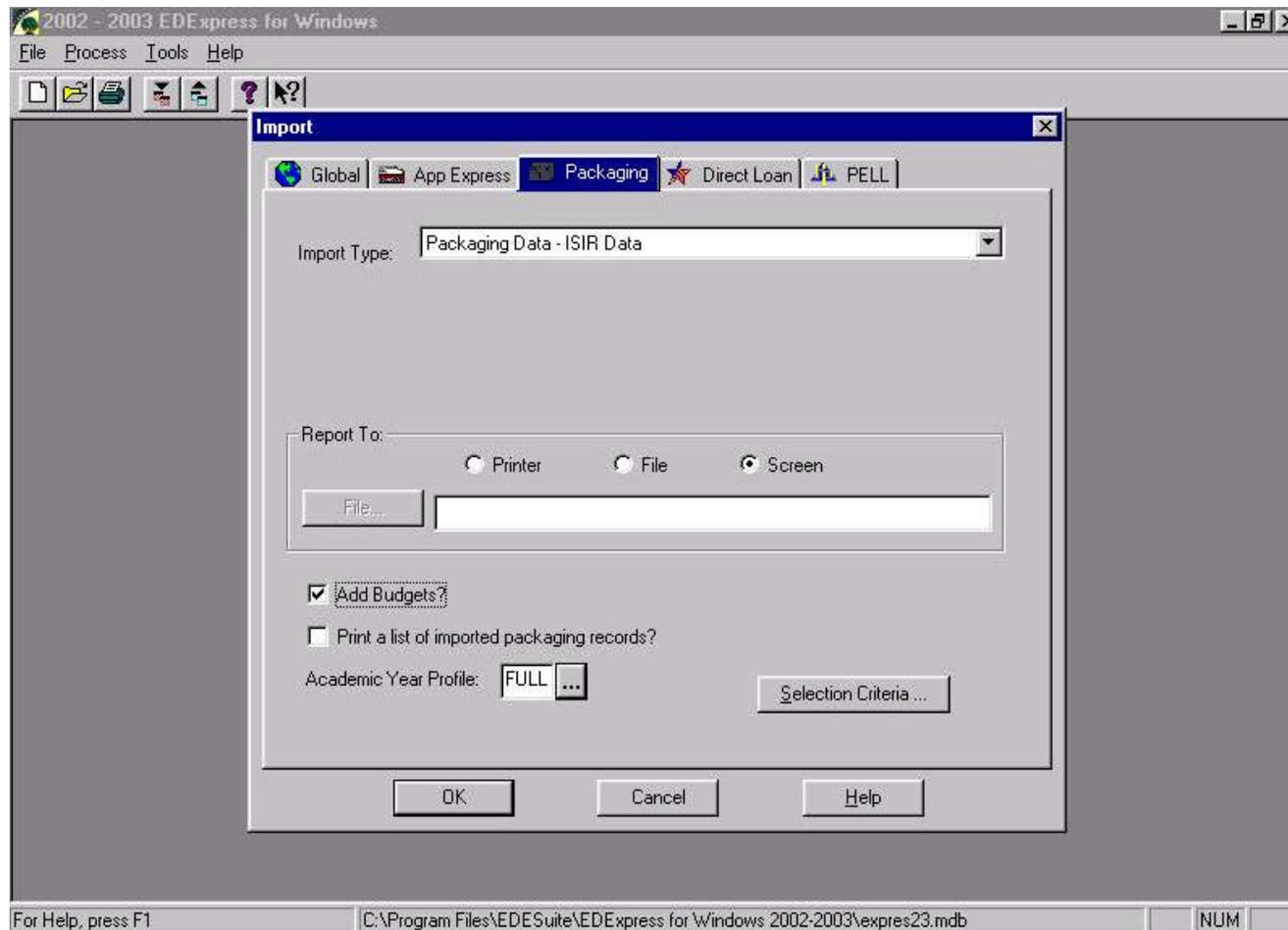


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# *Creating Records*

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

# Creating Records





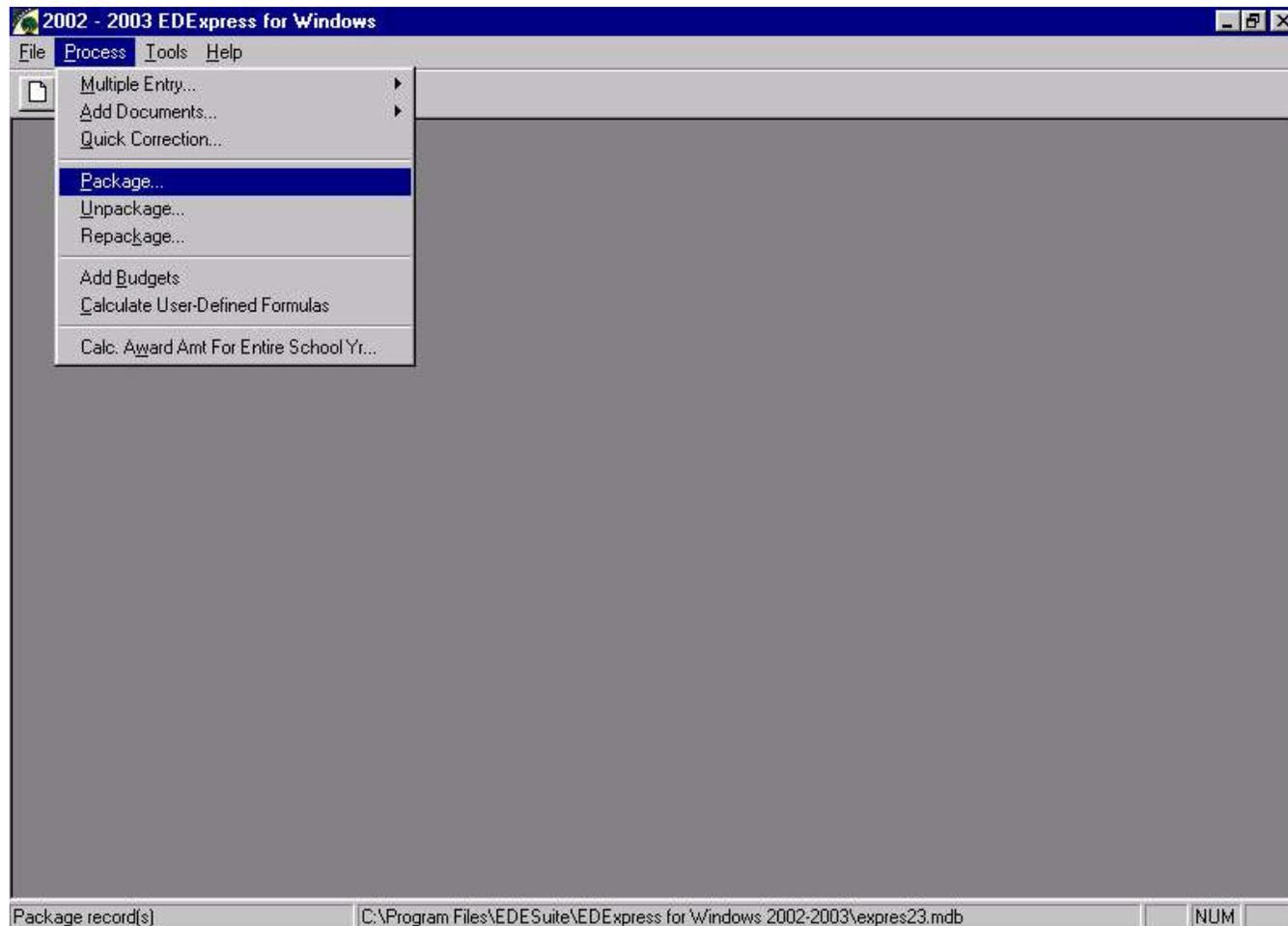
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# *Packaging Records*

- 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



# Packaging Records



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## *Award Letters*

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



# Award Letters

The screenshot shows the 'Print' dialog box within the '2002 - 2003 EDEExpress for Windows' application. The dialog has a menu bar with 'File', 'Process', 'Tools', and 'Help'. Below the menu bar are icons for file operations and a 'Print' button. The main area contains several sections:

- Report:** A dropdown menu set to 'Letters - Award' and radio buttons for 'Single' and 'Multiple' (selected).
- Report File Destination:** Radio buttons for 'Printer', 'File', and 'Screen' (selected). A 'File...' button and an empty text field are present.
- SSN File:** A 'File...' button and an empty text field with a browse icon.
- Options:** A grid of settings:
  - Address: [dropdown]
  - Sort Order: [SSN]
  - Acceptance Date: [ / / ]
  - Exclude Needs Analysis?
  - Print User Defined Text?
  - Print Missing Documents?
  - Exclude Heading From Letter?
  - Exclude Signature?
  - Exclude Records with Award Letter Received?
  - Print School Name/Address?

At the bottom are buttons for 'Selection Criteria', 'OK', 'Cancel', 'Help', and 'Print Setup'. The status bar at the bottom shows 'For Help, press F1', the file path 'C:\Program Files\EDESuite\NEDEExpress for Windows 2002-2003\expres23.mdb', and 'NUM'.



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Questions

Hands-on Exercises



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## *Contact Information*

We appreciate your feedback and comments.

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Sign-up information:

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