

## **Identifying and Recalculating 2007-2008 Pell Grant Awards Determined Using Eliminated Alternate Schedules in EDEXpress 2007-2008 Release 3.0**

### **Attachment to October 2007 Electronic Announcement**

With the elimination of the “Alternate” Payment and Disbursement Schedules, EDEXpress 2007-2008 users may need to recalculate Federal Pell Grant (Pell Grant) awards in both the Packaging and Pell modules of Release 3.0. Both modules contain a Low Tuition-related field that previously may have been activated to calculate awards using the “Alternate” Payment and Disbursement Schedules. This document provides detailed guidance on how to identify and update all student records with 2007-2008 Pell Grant awards that were determined using the “Alternate” Payment and Disbursement Schedules.

**Note:** If you do not use the EDEXpress Packaging module, you can skip the “Packaging Guidance” section below.

#### **Packaging Guidance**

You should identify and repackage all student records with 2007-2008 Pell awards that were determined using the “Alternate” Payment and Disbursement Schedules. You should also update records with non-blank Low Tuition values that are currently not packaged or were hand-packaged to prevent future Pell awarding using Low Tuition calculations.

To identify records in the Packaging module with non-blank Low Tuition field value, create a Packaging Query as follows:

- 1) Go to **Tools, Query, Packaging** and click Add.
- 2) Type “Low Tuition” or another recognizable description for Query Title.
- 3) Select “Low Tuition” as your Query Field.
- 4) Select “=” (or “equal to”) as your Operator.
- 5) Enter **1** in the Value field and click Append.
- 6) Enter **2** in the Value field and click Append.
- 7) Enter **3** in the Value field and click Append.
- 8) Enter **4** in the Value field and click Append.
- 9) In the Criteria section, click each line of the query that ends with “AND” and click the **Or** button. This changes the word “AND” to “OR” in the query language. You should only need to do this three times (for values 1-3).
- 10) Click Save, then click OK to exit.

Once you have created your query, you need to run two Packaging reports, as follows:

- 1) Go to **File, Print, Packaging**.
- 2) Select List-Packaged Students as the Report Type.
- 3) Click Selection Criteria. On the subsequent screen, click the ellipses button next to Query Title and double-click the “Low Tuition” query you created. Click OK to exit Selection Criteria.
- 4) Click OK to run the report.
- 5) Repeat steps 1-4, selecting List-Unpackaged Students in step #2.

Taken in combination, the List-Packaged Students and List-Unpackaged Students, with your “Low Tuition” query applied, will provide you with a list of all students in the Packaging module you previously designated as eligible for Low Tuition-based Pell awards.

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*Note:* If no students display on either report, you do not have to update any records.

Once you have identified all students with Low Tuition values assigned, use the “Low Tuition” query you created for your reports to remove those values from the records.

- 1) For records appearing on your List-Packaged Students report, use the Unpackage process (**Process, Unpackage**) in combination with your “Low Tuition” query to set the records to a U (Unpackaged) status. This will allow you to modify the Low Tuition value on the record to blank.
- 2) Use Packaging Multiple Entry (**Process, Multiple Entry, Packaging**) in combination with your “Low Tuition” query to correct the Low Tuition field to blank on all impacted records.
- 3) Run the Package process (**Process, Package**) to recalculate your students’ 2007-2008 Pell awards (and overall aid package) according to the “Regular” Payment and Disbursement Schedules.

*Notes:*

- If you do not wish to package all of the records in your database that are currently not packaged, we recommend using Select Records (under Selection Criteria) to limit the Package process to the students listed on the List-Packaged Students report you printed in prior steps.
- As an alternative to unpackaging existing awards for your students in order to recalculate Pell, you may choose to manually adjust Pell awards for impacted students on the Awarded Funds dialog for each student. However, we recommend you examine the student’s overall award package in this scenario, as an increased Pell award may increase or decrease other fund award amounts the student is now eligible to receive according to your award methodologies.
- After recalculating the award package for impacted students, you may want to print and distribute new award letters for those students. Award letters can be printed from the Awards tab (**File, Print**) or globally (**File, Print, Packaging**).
- If you normally import Packaging data into the Pell module to create Pell origination records, be aware that you will not be able to re-import Packaging data to modify existing Pell origination records with modified Pell award amounts. The Packaging import into Pell can only be used to create new Pell origination records, not to modify existing records. You will need to modify your Pell origination records with new Award Amount for Entire School Year values according to the instructions in the “Pell Guidance” section later in this message.

After you have updated all packaged and unpackaged records, we recommend you deactivate the Low Tuition option in Packaging to prevent future use. To do so, go to **Tools, Setup, Packaging, System** and clear the checkbox for “Use Low Tuition?” Clearing this checkbox prevents updates to the Low Tuition field on the Awards tab, in Packaging Multiple Entry, and in Packaging Import External Add or Change files.

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**Pell Guidance**

Similarly to the Packaging guidance, you should first identify all origination records in the Pell module that have been originated with the Low Tuition and Fees flag set. Once you have identified these records, you should correct the Low Tuition & Fees Code field on the records to blank, recalculate the Award Amount for the Entire School Year value for each record, and potentially adjust actual disbursements.

To identify records in the Pell module with a non-blank value in the Low Tuition & Fees Code field, create a Pell Query as follows:

- 1) Go to **Tools, Query, Pell** and click Add.
- 2) Type “Low Tuition” or another recognizable description for Query Title.
- 3) Select “Low Tuition and Fees Code” as your Query Field.
- 4) Select “<>” (or “not equal to”) as your Operator.
- 5) Leave the Value field blank and click Append, then Save.
- 6) Click OK to exit.

Once you have created your Pell query, run the Pell Origination List report, as follows:

- 1) Go to **File, Print, Pell**.
- 2) Select Origination List as the Report Type.
- 3) Select your Reporting and Attended Pell ID values, and ensure Pell is selected as the Grant Type field.
- 4) Click Selection Criteria. On the subsequent screen, click the ellipses button next to Query Title and double-click the “Low Tuition” query you created. Click OK to exit Selection Criteria.
- 5) (Optional) Change the Report File Destination to Printer, File, or Screen if needed.
- 6) Click OK to run the report.

Once you have identified all origination records with a non-blank Low Tuition & Fees Code field value by running this report, you can update the field value to blank and recalculate the Pell award in one of two ways:

- 1) Open each student record individually in EDEExpress, go to the Origination (Pell) tab, correct the Low Tuition and Fees Code field value to blank, select **Process, Calculate Award Amount for Entire School Year**, and save the record.
- 2) Create and import an External Pell Origination Add/Change record (message class PGEO08OP) that updates the Low Tuition & Fees Code (field #15) to blank. To do this, you must follow the record layout in the 2007-2008 COD Technical Reference, Volume III, Section 3, available for download from the “Technical References and Guides” section of the Federal Student Aid Download Web site, located at <http://fsadownload.ed.gov>. To recalculate the Pell award, you can then select **Process, Calculate Award Amount for Entire School Year** from the EDEExpress main menu.

EDEExpress will calculate the student’s new Pell award based on the “Regular” Payment and Disbursement Schedules.

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*Note:* If you chose to run the Calculate Award Amount for Entire School Year process from the EDEExpress main menu, we recommend using Select Records (under Selection Criteria) to limit the calculation process to the students listed on the Origination List report you printed in prior steps.

Once the Award Amount for Entire School Year is recalculated on the origination record, you may need to adjust disbursements for impacted students on the Disburse (Pell) tab. Please note the following tips:

- If you have not entered disbursements for a student whose Low Tuition & Fees Code you corrected, your disbursements will automatically be calculated and edited by EDEExpress according to the new Award Amount for Entire School Year when you add them to the Disburse tab.
- If you have entered (but not exported) disbursements for a student whose Low Tuition & Fees Code you corrected, correct the Amount Submitted as necessary to the new amount you want to disburse prior to selecting the Disbursement Release Indicator (DRI).
- If you have submitted actual disbursements (Disbursement Release Indicator, or DRI, equals “True,” or selected) for a student whose Low Tuition & Fees Code you corrected and whose Award Amount for Entire School Year has changed, adjust the existing disbursements to the new amounts as necessary and resubmit the disbursement data to the Common Origination and Disbursement (COD) System.