



Electronic Access Conference
2000 GET CONNECTED



We Help Put America
Through School

Student Financial Assistance



Session 12

EDExpress Application Processing—What's New and Q&A



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EDExpress Application Processing— What's New and Q & A

- Who is this session geared for?
 - All levels
- Evaluations
- Questions
 - Time for Q&A at end of session



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Agenda

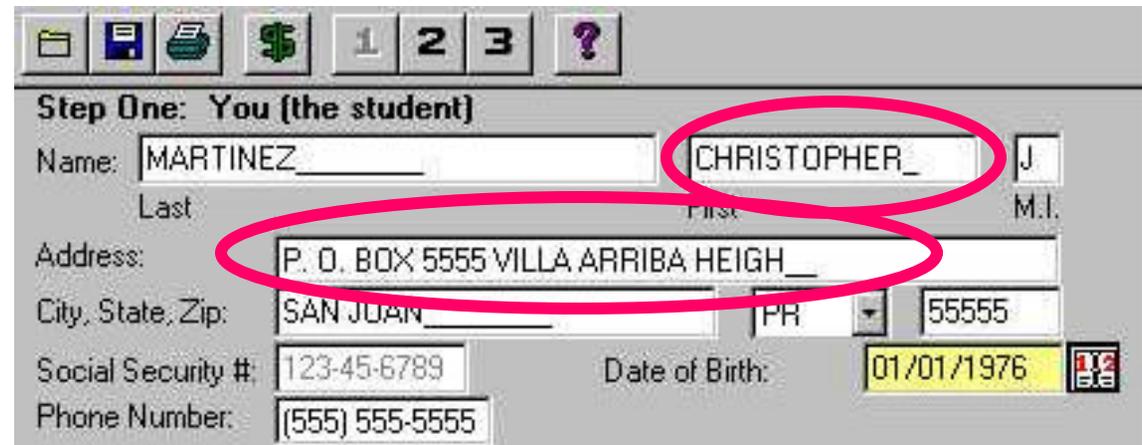
- FAFSA Changes
- Consistency Improvements
- Printing
- Global Setup
- Update Database
- Corrections
- Import Function
- User Database
- Multiple Entry
- List Changes
- Data Entry
- Document Tracking
- Query
- RAD Process



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Changes to the FAFSA

- First name expanded from 9 to 12 characters
- Address field expanded to 35 characters



The screenshot shows the FAFSA Step One form for a student named Christopher Martinez. The form fields are as follows:

| | | | |
|--------------------|------------------------------------|----------------|------------|
| Name: | MARTINEZ | CHRISTOPHER_ | J |
| Last | | First | M.I. |
| Address: | P. O. BOX 5555 VILLA ARRIBA HEIGH_ | | |
| City, State, Zip: | SAN JUAN | PR | 55555 |
| Social Security #: | 123-45-6789 | Date of Birth: | 01/01/1976 |
| Phone Number: | (555) 555-5555 | | |

Red circles highlight the first name field (CHRISTOPHER_) and the address field (P. O. BOX 5555 VILLA ARRIBA HEIGH_).





Other FAFSA Changes

Step Two: You (the student/spouse) Income and Assets

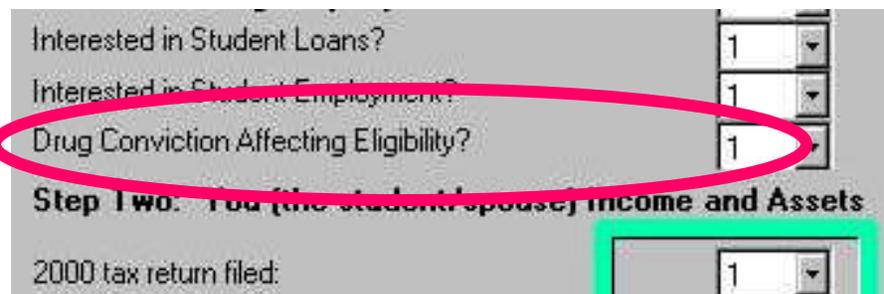
| | |
|--|-----------|
| 2000 tax return filed: | 1 |
| Type of 2000 tax return used: | 1 |
| Eligible to file 1040A or 1040EZ? | 2 |
| 2000 Adjusted Gross Income: | \$6,725 |
| 2000 U.S. income tax paid: | \$366 |
| 2000 Exemptions claimed: | 00 |
| 2000 Student's income: | \$5,452 |
| 2000 Spouse's income: | \$0 |
| Total from Worksheet A: | \$0 |
| Total from Worksheet B: | \$0 |
| Total from Worksheet C: | \$125 |
| Current net worth of investments: | \$31,725 |
| Current net worth of business/farm: | \$256,589 |
| Cash, savings, and checking accounts: | \$5,267 |
| Number of Months VA benefits received: | 01 |
| Monthly VA education benefits: | 1 |

- Worksheet C
- Business/Farm Net Worth



Other FAFSA Changes

- Drug Eligibility Question moved from #28 to #35
- “Do you have children?”



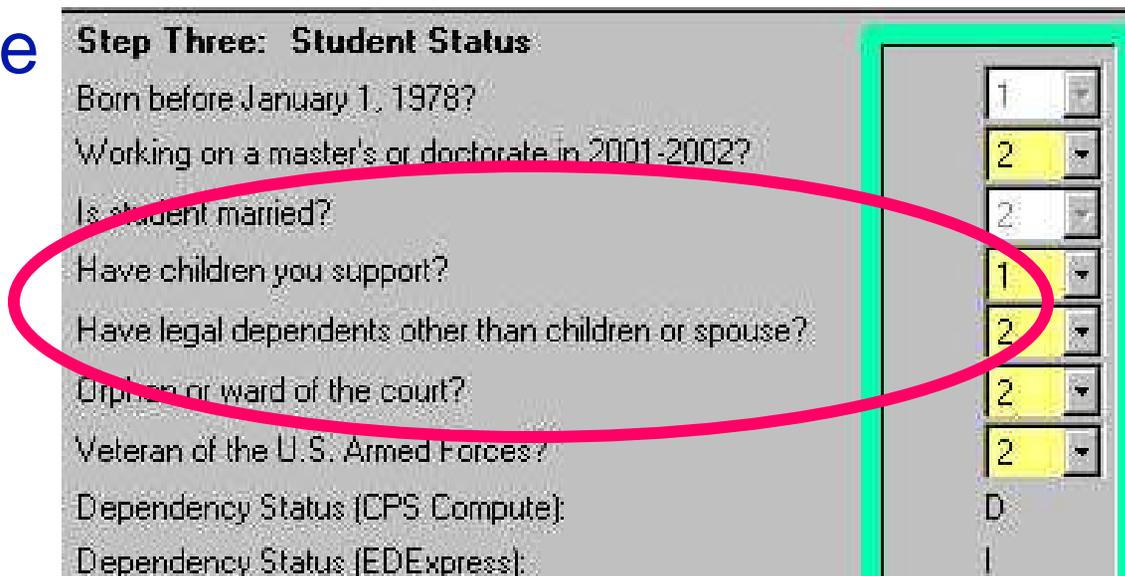
Interested in Student Loans? 1

Interested in Student Employment? 1

Drug Conviction Affecting Eligibility? 1

Step Two: You (the student/spouse) income and Assets

2000 tax return filed: 1



Step Three: Student Status

Born before January 1, 1978? 1

Working on a master's or doctorate in 2001-2002? 2

Is student married? 2

Have children you support? 1

Have legal dependents other than children or spouse? 2

Orphan or ward of the court? 2

Veteran of the U.S. Armed Forces? 2

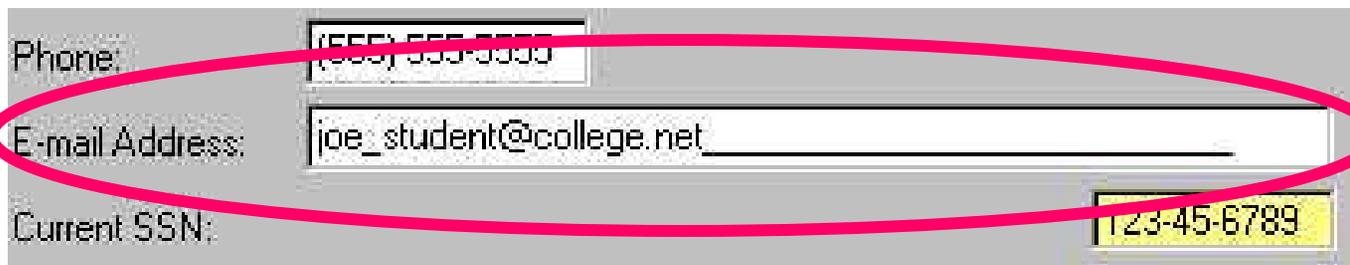
Dependency Status (CPS Compute): D

Dependency Status (EDEXpress): I



Other FAFSA Changes

- Student email addresses
 - collected from FAFSA on the Web applications, electronic applications, and electronic corrections
 - email address is correctable



Phone: (555) 555-5555

E-mail Address: joe_student@college.net

Current SSN: 123-45-6789

The E-mail Address field is circled in red.





Other FAFSA Changes

- EDEExpress will reflect other ISIR deletions and revised data elements
- Printed ISIR will reflect changes to NSLDS data
- State Agency ISIRs will contain NSLDS data





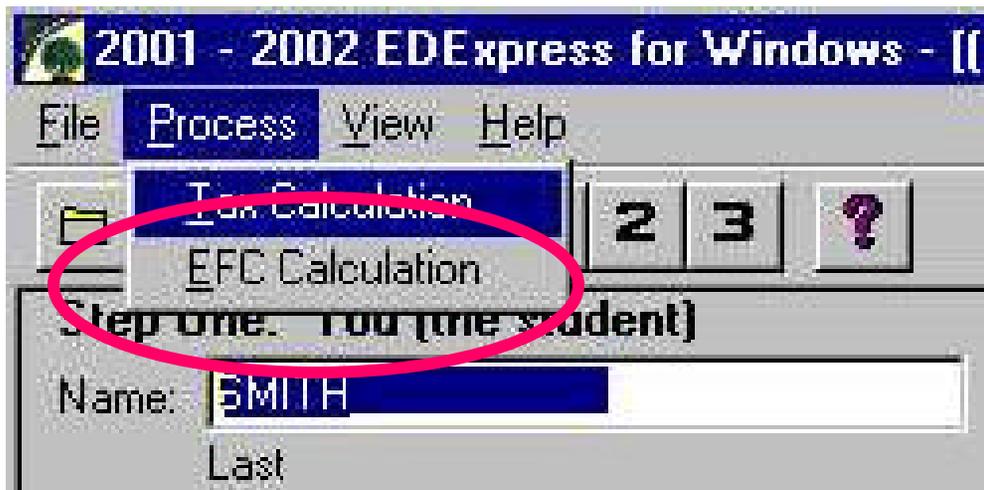
Consistency Improvements

- All references to “Institution Code” and “Institution” are changed to “Federal School Code” and “School” throughout software, help text, and documentation
- All references to “formerly Title IV WAN” are removed
- “TG ID” and “TG ID #” will be changed to “TG #”



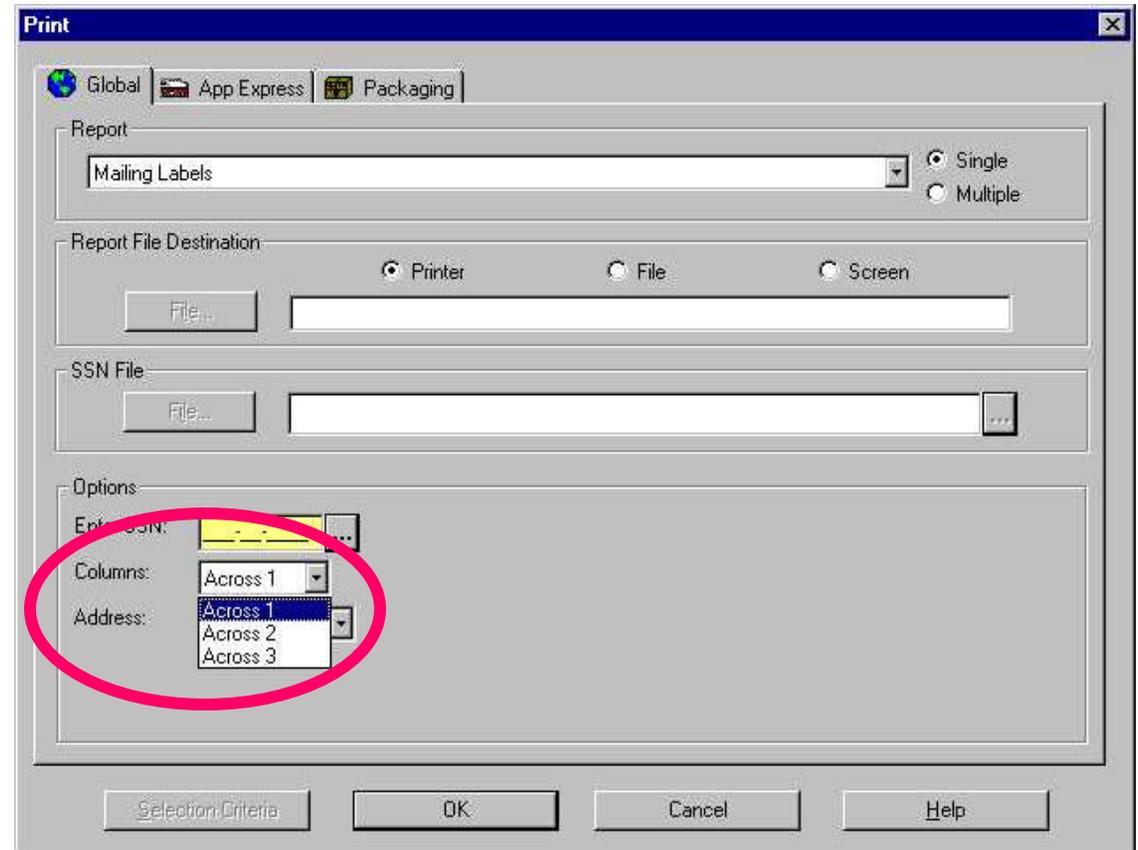
Consistency Improvements

- Options to Print Estimated EFC will be labeled consistently



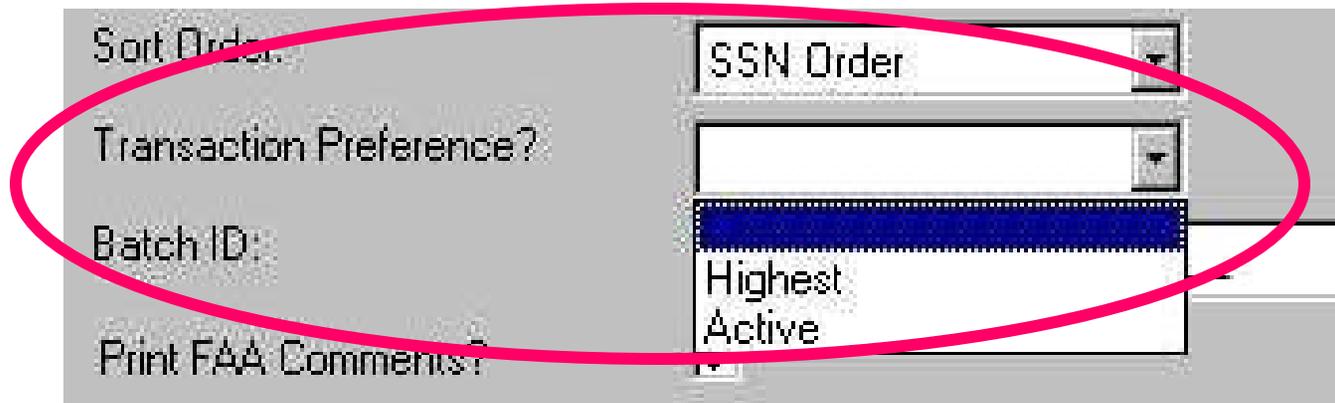
Printing

- New option for printing mailing labels “Across 2”



Printing

- EDExpress will have a print option under List-Processed ISIRs to print either Highest or Active Transaction



Sort Order: SSN Order

Transaction Preference? Highest
Active

Batch ID:

Print FAA Comments?



Global Setup

- EDExpress will allow demographic, setup, and most queries to be moved forward from the prior year





Global Setup

Prior Year Move Dialog

| | Group | Setup Options | Import |
|----|--|--------------------------|-------------------------------------|
| 1 | QUERY - GLOBAL, APP EXPRESS, PACKAGING | | <input checked="" type="checkbox"/> |
| 2 | QUERY - DIRECT LOAN | | <input checked="" type="checkbox"/> |
| 3 | QUERY - PELL | | <input checked="" type="checkbox"/> |
| 4 | GLOBAL SETUP | Security Groups | <input type="checkbox"/> |
| 5 | | Security Users | <input type="checkbox"/> |
| 6 | | Document Tracking | <input type="checkbox"/> |
| 7 | | User-Defined Letter Text | <input type="checkbox"/> |
| 8 | PACKAGING SETUP | Academic Year Profiles | <input type="checkbox"/> |
| 9 | | Fund Maintenance | <input type="checkbox"/> |
| 10 | | Award Methodologies | <input type="checkbox"/> |
| 11 | | Budgets | <input type="checkbox"/> |
| 12 | | SAP Values | <input type="checkbox"/> |
| 13 | PELL SETUP | School | <input type="checkbox"/> |

OK Cancel Help



Global Setup

■ Can move forward

- Demographic Data
- Security Groups Setup
- Most Queries
- Pell Setup
- Packaging Methodology and Academic Year Profiles

■ Cannot move forward

- Queries that reference modified/deleted fields, User Database, or date parameter
- Estimated Disbursement Dates in Pell Setup



Update Database

- The update database will be renamed so that the filename is application and year specific
- The update process will be modified to run only once
- There will be a new comparison process of the version number in registry with the version of the database



Corrections

- Correction ISIRs will return in message class CORR02OP. (Rejected corrections will be returned in message class CORE02OP)
- Correction flags will allow tracking of corrections by transaction and cumulatively
 - #: corrected on this transaction
 - @: corrected on previous transaction





Corrections

- “Quick Correction” will allow assumption and override capability

Quick Correction

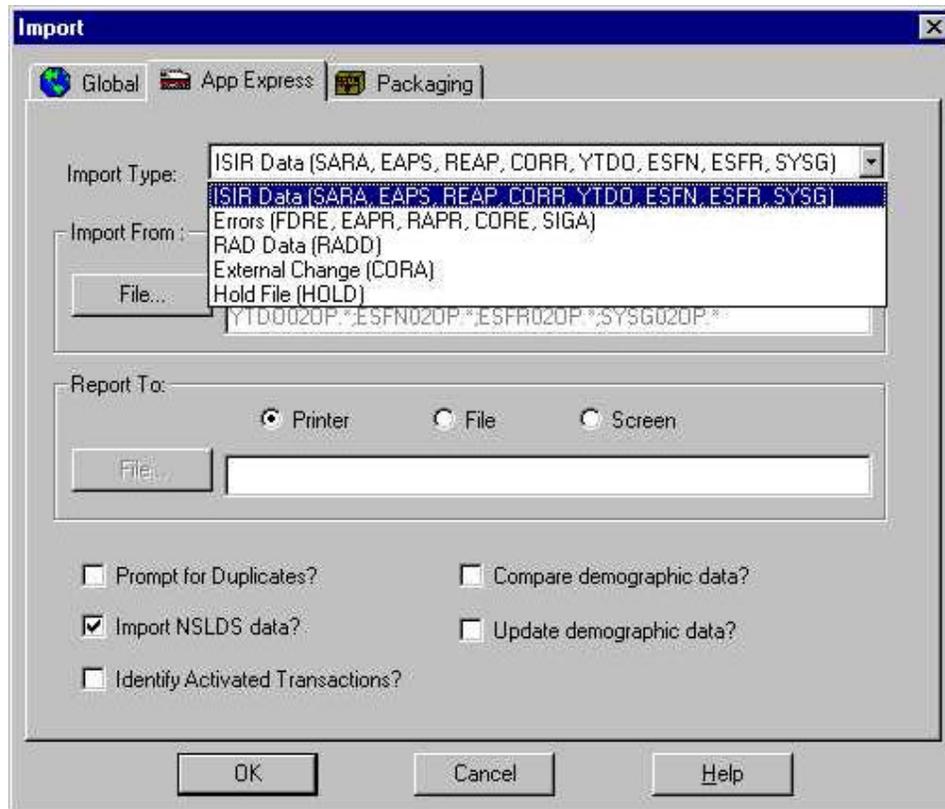
SSN: Name ID: Trans #:

| SAR # | Description | Value |
|-------|--------------------------------------|--------------------------|
| 96 | Federal School Code 6 | |
| 97 | Housing Plans 6 | |
| 99 | Signed By | |
| 100 | Preparer's Social Security Number | |
| 101 | Employer Identification Number (EIN) | |
| 102 | Preparer's Signature | <input type="checkbox"/> |
| 103 | Application Receipt Date | |
| 104 | Dependency Override | |
| 105 | FAA Adjustment Flag | |
| 111 | Early Analysis | <input type="checkbox"/> |
| 112 | DRN | |
| 113 | Home Address | |
| | Reject Override Code B | <input type="checkbox"/> |
| | Reject Override Code N | <input type="checkbox"/> |
| | Reject Override Code W | <input type="checkbox"/> |
| | Assumption Override Code 1 | <input type="checkbox"/> |
| | Assumption Override Code 2 | <input type="checkbox"/> |
| | Assumption Override Code 3 | <input type="checkbox"/> |
| | Assumption Override Code 4 | <input type="checkbox"/> |
| | Assumption Override Code 5 | <input type="checkbox"/> |
| | Assumption Override Code 6 | <input type="checkbox"/> |

Original School:



Import Function



The screenshot shows the 'Import' dialog box with the following fields and options:

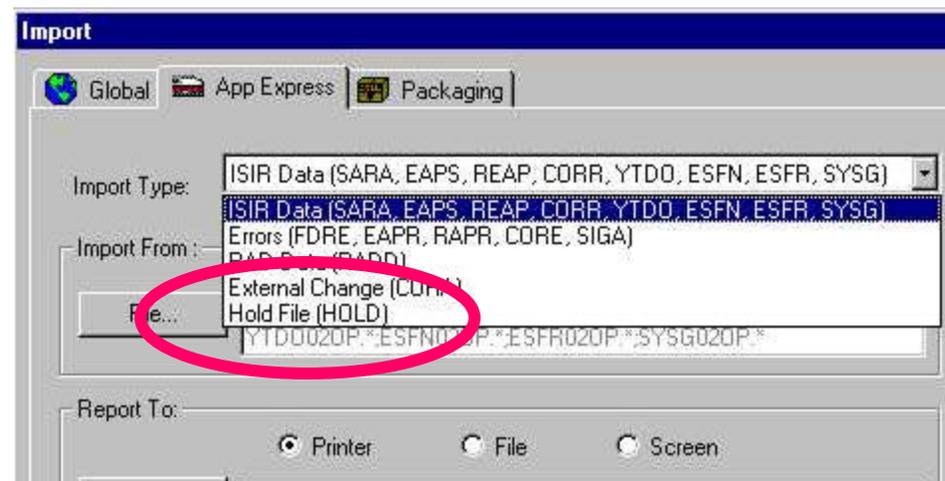
- Import Type:** A dropdown menu with 'ISIR Data (SARA, EAPS, REAP, CORR, YTDQ, ESFN, ESFR, SYSG)' selected.
- Import From:** A list box containing 'Errors (FDRE, EAPR, RAPR, CORE, SIGA)', 'RAD Data (RADD)', 'External Change (CORA)', and 'Hold File (HOLD)'. A 'File...' button is to the left.
- Report To:** Radio buttons for 'Printer' (selected), 'File', and 'Screen'. A 'File...' button and an empty text field are below.
- Checkboxes:**
 - Prompt for Duplicates?
 - Compare demographic data?
 - Import NSLDS data?
 - Update demographic data?
 - Identify Activated Transactions?
- Buttons:** 'OK', 'Cancel', and 'Help' at the bottom.

- ISIR imports combined into one import type
- The first four characters of the message class will appear next to the import descriptions



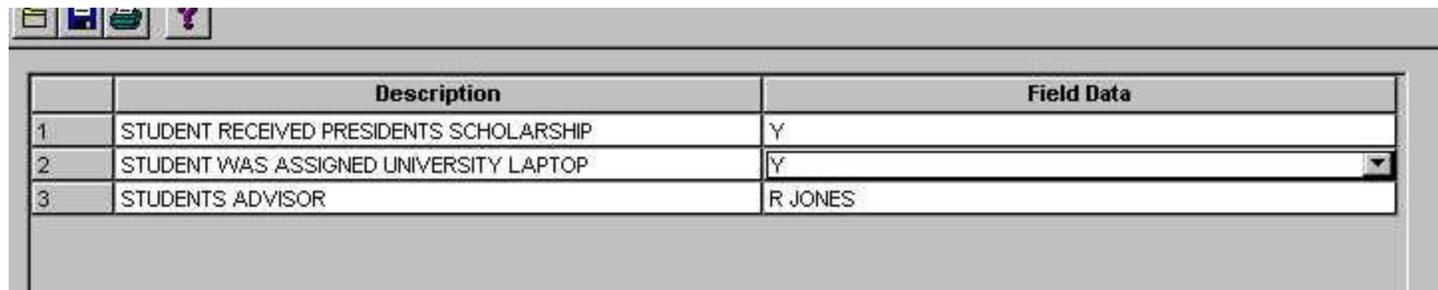
Import Function

- New import type added for hold files (HOLD02OP)
 - Daily file containing information for students who listed your institution on a web application and are pending a signature page



User Database

- Valid values for User Data Field Names will be changed to A-Z and 0-9. First character must be a letter
 - Characters such as ‘.’, ‘!’, and “()’ will no longer be allowed
 - This change is to avoid database error messages

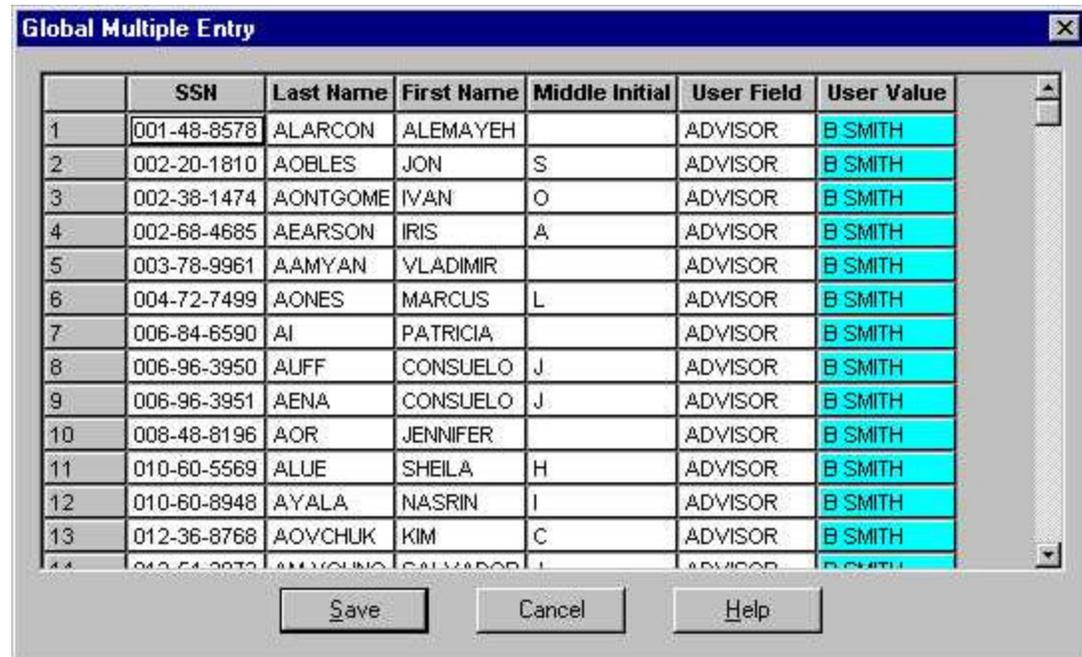


| | Description | Field Data |
|---|---|------------|
| 1 | STUDENT RECEIVED PRESIDENTS SCHOLARSHIP | Y |
| 2 | STUDENT WAS ASSIGNED UNIVERSITY LAPTOP | Y |
| 3 | STUDENTS ADVISOR | R JONES |



Multiple Entry

- Student last name added to Multiple Entry screen to make it easier to select records. Users will be able to sort students by last name



| | SSN | Last Name | First Name | Middle Initial | User Field | User Value |
|----|-------------|-----------|------------|----------------|------------|------------|
| 1 | 001-48-8578 | ALARCON | ALEMAYEH | | ADVISOR | B SMITH |
| 2 | 002-20-1810 | AOBLES | JON | S | ADVISOR | B SMITH |
| 3 | 002-38-1474 | AONTGOME | IVAN | O | ADVISOR | B SMITH |
| 4 | 002-68-4685 | AEARSON | IRIS | A | ADVISOR | B SMITH |
| 5 | 003-78-9961 | AAMYAN | VLADIMIR | | ADVISOR | B SMITH |
| 6 | 004-72-7499 | AONES | MARCUS | L | ADVISOR | B SMITH |
| 7 | 006-84-6590 | AI | PATRICIA | | ADVISOR | B SMITH |
| 8 | 006-96-3950 | AUFF | CONSUELO | J | ADVISOR | B SMITH |
| 9 | 006-96-3951 | AENA | CONSUELO | J | ADVISOR | B SMITH |
| 10 | 008-48-8196 | AOR | JENNIFER | | ADVISOR | B SMITH |
| 11 | 010-60-5569 | ALUE | SHEILA | H | ADVISOR | B SMITH |
| 12 | 010-60-8948 | AYALA | NASRIN | I | ADVISOR | B SMITH |
| 13 | 012-36-8768 | AOVCHUK | KIM | C | ADVISOR | B SMITH |
| 14 | 012-54-2272 | AMAYOUNG | SALVADOR | L | ADVISOR | B SMITH |

Buttons: Save, Cancel, Help



List Changes

- Process|List Changes from SAR/ISIR tab will allow sorting on the grid
- List Changes will properly display Dependency Overrides and FAA Adjustments

| SAR # | Description | Entered Value | Assessed Value |
|-------|---------------------------------------|---------------|----------------|
| 85 | Student's Number in College 2001-2002 | | |
| 86 | College Choice #1 | | |
| 87 | Housing Code College #1 | | |
| 88 | College Choice #2 | 001348 | |
| 89 | Housing Code College #2 | | |
| 80 | College Choice #3 | 001000 | |
| 81 | Housing Code College #3 | | |
| 92 | College Choice #4 | | |
| 93 | Housing Code College #4 | | |
| 94 | College Choice #5 | | |
| 95 | Housing Code College #5 | | |
| 86 | College Choice #6 | | |
| 87 | Housing Code College #6 | | |
| 88 | Signed By | | |
| 100 | Preparer's Social Security Number | | |
| 101 | Employer Identification Number (EIN) | | |
| 102 | Preparer's Signature | | |
| 103 | Preparer's Email Address | | |
| 104 | Dependency Override | 1 | |
| 105 | FAA Adjustment Flag | 1 | |
| 111 | State of Legal Residence | | |
| 112 | DOB | | |
| 113 | E-mail Address | | |



Data Entry

- Hotkeys added for Open (ctrl + O) and New (ctrl + N)
- Demo Tab will not edit on Permanent Zip Code
- Entry of invalid dates (example:12/39/2000) no longer allowed
- Displays ID of user that originally imported the ISIR. Will no longer temporarily change when another user makes corrections



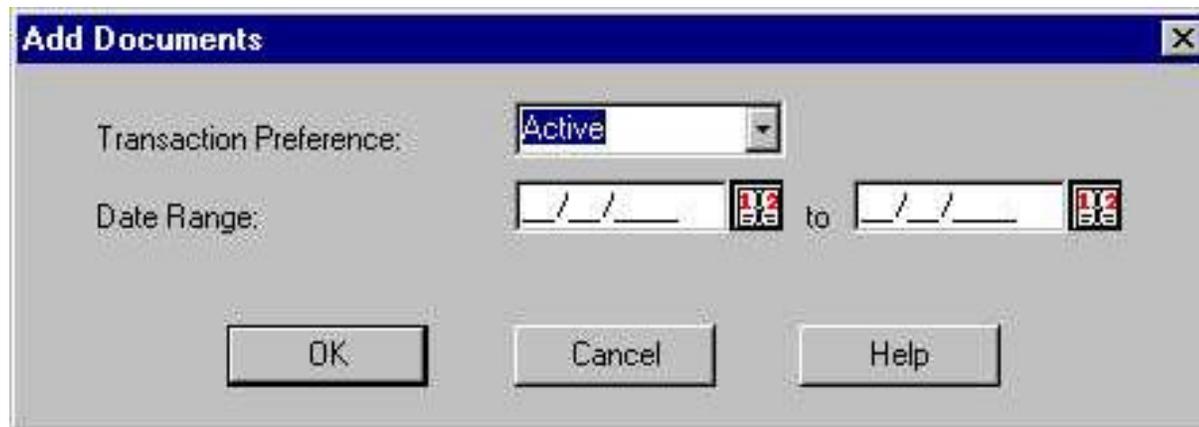
Document Tracking

- When adding documents, the dialog box will contain a date range field as well as a Transaction Preference dropdown box
- A new document status of “Received Not Reviewed” will be added
- Users will have the option of modifying the greeting and closing of the Document Tracking Letter



Document Tracking

- Process|Add Documents will allow documents to be added to highest or active transaction, or by date range



Add Documents

Transaction Preference: Active

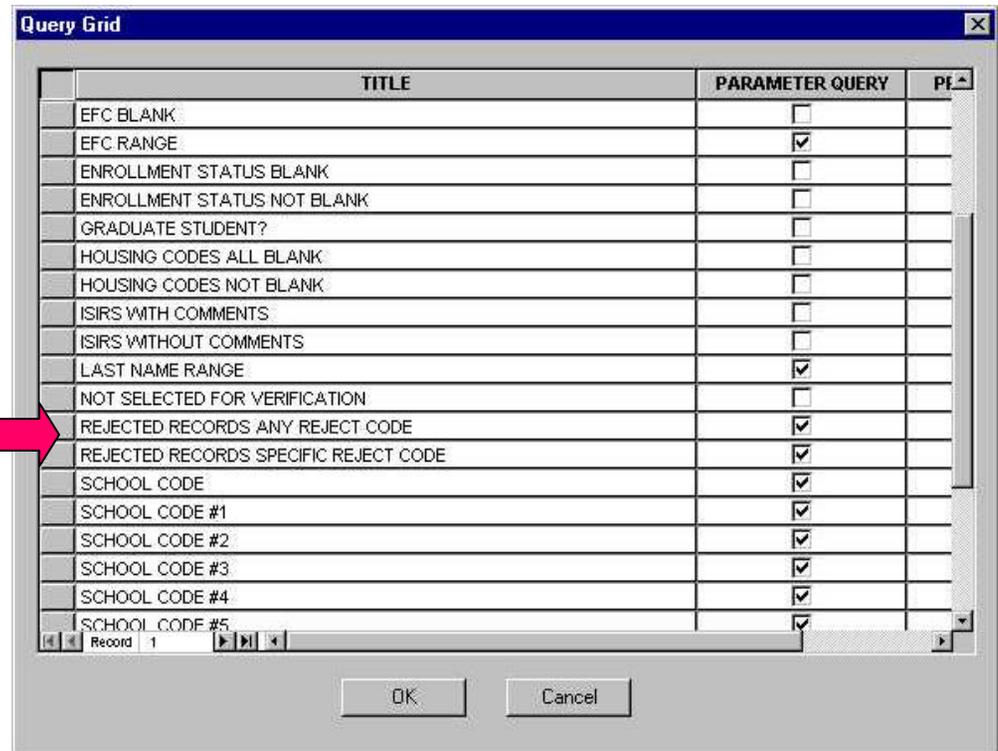
Date Range: ___/___/___ to ___/___/___

OK Cancel Help



Query

- Additional predefined queries added to allow users to search for data in comma separated fields (such as ISIR reject codes)



| TITLE | PARAMETER QUERY | PF |
|---------------------------------------|-------------------------------------|----|
| EFC BLANK | <input type="checkbox"/> | |
| EFC RANGE | <input checked="" type="checkbox"/> | |
| ENROLLMENT STATUS BLANK | <input type="checkbox"/> | |
| ENROLLMENT STATUS NOT BLANK | <input type="checkbox"/> | |
| GRADUATE STUDENT? | <input type="checkbox"/> | |
| HOUSING CODES ALL BLANK | <input type="checkbox"/> | |
| HOUSING CODES NOT BLANK | <input type="checkbox"/> | |
| ISIRS WITH COMMENTS | <input type="checkbox"/> | |
| ISIRS WITHOUT COMMENTS | <input type="checkbox"/> | |
| LAST NAME RANGE | <input checked="" type="checkbox"/> | |
| NOT SELECTED FOR VERIFICATION | <input type="checkbox"/> | |
| REJECTED RECORDS ANY REJECT CODE | <input checked="" type="checkbox"/> | |
| REJECTED RECORDS SPECIFIC REJECT CODE | <input checked="" type="checkbox"/> | |
| SCHOOL CODE | <input checked="" type="checkbox"/> | |
| SCHOOL CODE #1 | <input checked="" type="checkbox"/> | |
| SCHOOL CODE #2 | <input checked="" type="checkbox"/> | |
| SCHOOL CODE #3 | <input checked="" type="checkbox"/> | |
| SCHOOL CODE #4 | <input checked="" type="checkbox"/> | |
| SCHOOL CODE #5 | <input checked="" type="checkbox"/> | |





Query

- EDEExpress will contain a browsable grid of all query fields for each module

Browse App Express

Batch Activity Query Fields

| | Field Name | Field Length | |
|---|-----------------------------------|--------------|-------|
| ▶ | AAI: ADJUSTED AVAILABLE INCOME | 8 | tbl_E |
| | ADD DATE - ISIR | 8 | tbl_E |
| | AGE OF OLDER PARENT | 2 | tbl_E |
| | AI: AVAILABLE INCOME | 8 | tbl_E |
| | ALIEN REGISTRATION NUMBER | 9 | tbl_E |
| | APA: ASSET PROTECTION ALLOWANCE | 9 | tbl_E |
| | APPLICATION RECEIPT DATE | 0 | tbl_E |
| | APPLICATION SOURCE SITE CODE | 2 | tbl_E |
| | ARE YOU MALE? | 1 | tbl_E |
| | ASSUMED CITIZENSHIP | 1 | tbl_E |
| | ASSUMED DATE OF BIRTH PRIOR | 1 | tbl_E |
| | ASSUMED FATHER'S INCOME FROM WORK | 7 | tbl_E |

Record 1

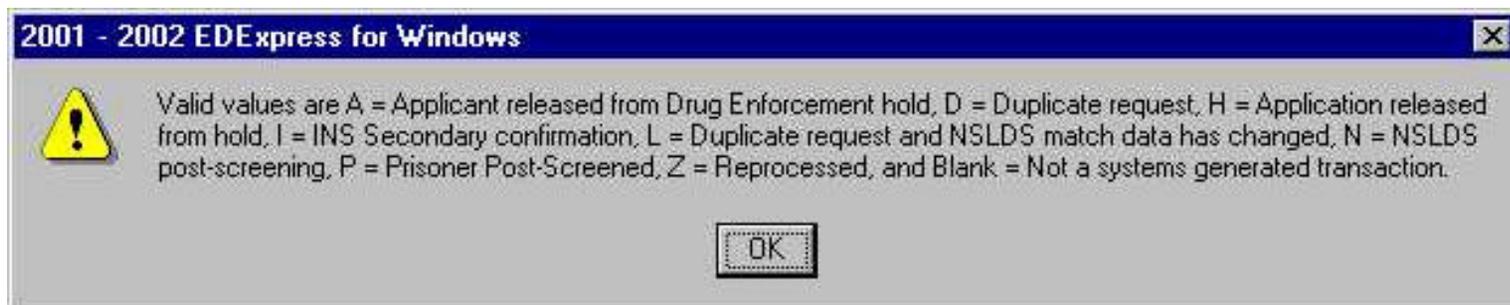
OK Help





Query

- Help will make every effort to supply information about valid field content instead of referring user to the technical reference





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RAD Process

- *New Renewal Applications software*

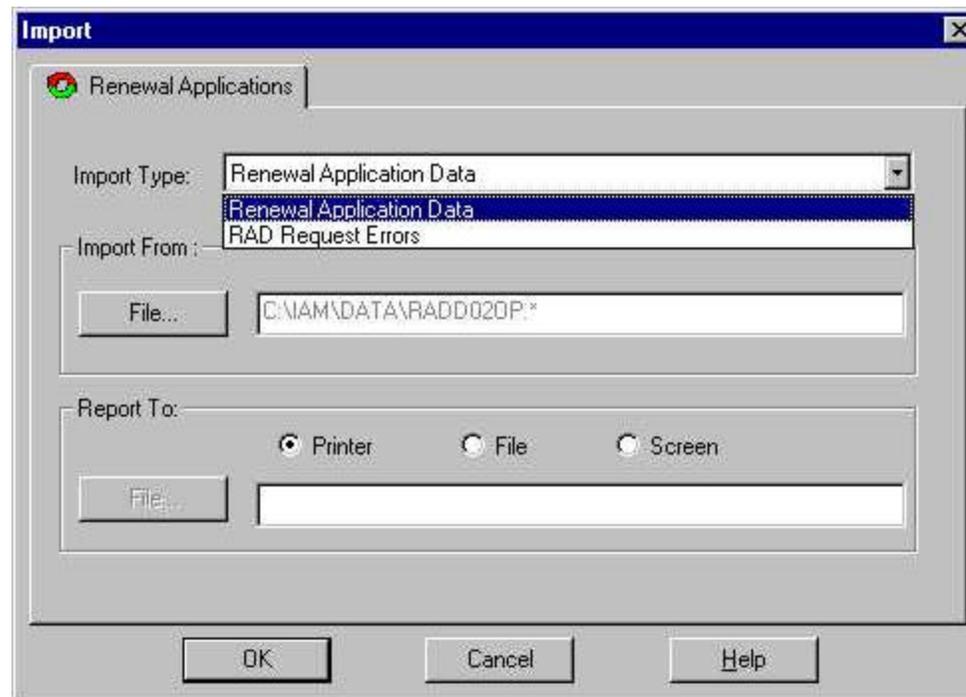


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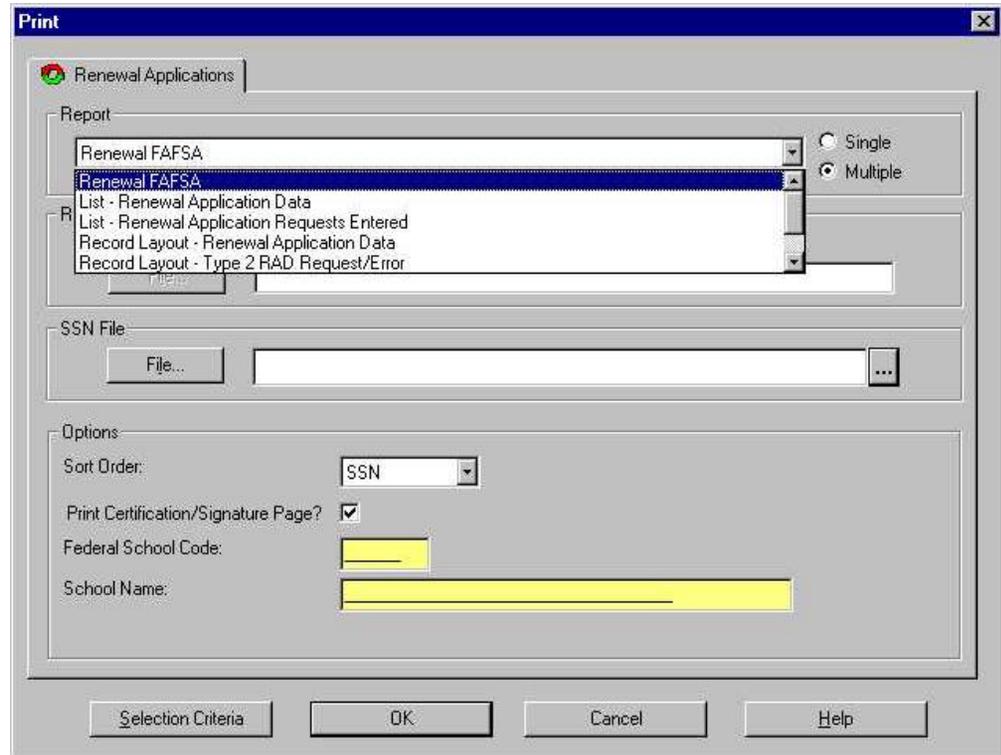
RAD Process

- Renewal Applications software
 - Import RAD files (RADD02OP)
 - Import and print RAD error files (EREP02OP)



Renewal Process

- Renewal Applications software
 - Print Renewal Applications and List Renewal Applications



The screenshot shows a 'Print' dialog box for the 'Renewal Applications' software. The dialog is titled 'Print' and has a close button (X) in the top right corner. It contains the following sections:

- Report:** A list box containing the following items: 'Renewal FAFSA', 'Renewal FAFSA', 'List - Renewal Application Data', 'List - Renewal Application Requests Entered', 'Record Layout - Renewal Application Data', and 'Record Layout - Type 2 RAD Request/Error'. The 'Renewal FAFSA' item is selected. To the right of the list box are two radio buttons: 'Single' (unselected) and 'Multiple' (selected).
- SSN File:** A section with a 'File...' button and an empty text field with a browse button (three dots).
- Options:** A section with the following fields:
 - 'Sort Order:' with a dropdown menu set to 'SSN'.
 - 'Print Certification/Signature Page?' with a checked checkbox.
 - 'Federal School Code:' with an empty text field.
 - 'School Name:' with an empty text field.

At the bottom of the dialog are four buttons: 'Selection Criteria', 'OK', 'Cancel', and 'Help'.





Further Assistance

We appreciate your feedback and comments.

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SFATECH

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



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Questions?



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