Student Financial Aid for institutions reporting on a full-year cohort (public program reporters)

Overview

IPEDS Student Financial Aid Component Overview

Program Reporters

Welcome to the Student Financial Aid (SFA) component. The purpose of the SFA component is to collect information about financial aid provided to various groups of undergraduate students and military/veteran educational benefits for all students at your institution.

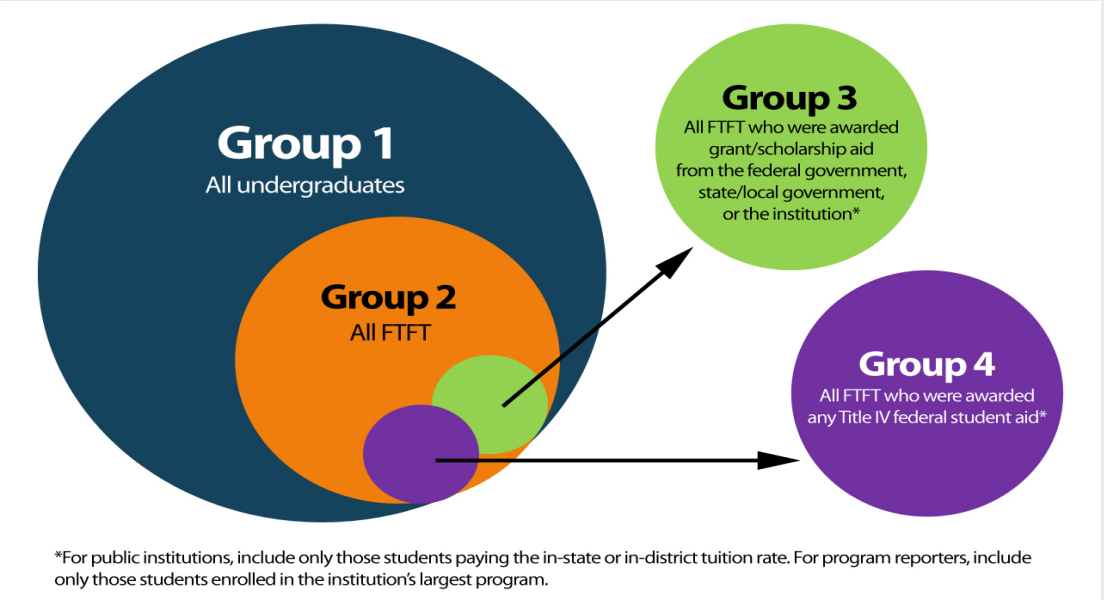
Changes to reporting for 2019-20

- There is a new instruction to exclude students participating in Experimental Pell

Data Reporting Reminders

Undergraduate Student Groups
You will be asked to report information for different groups of students.

- **Group 1:** All undergraduate students
- **Group 2:** Of Group 1, full-time, first-time degree/certificate-seeking students (FTFT)
- **Group 3:** Of Group 2, students enrolled in the institution's largest program and were awarded any grant/scholarship aid from the federal government, state/local government, or the institution. For public institutions, include only those who paid the in-state or in-district tuition rate.
- **Group 4:** Of Group 2, students enrolled in the institution's largest program and were awarded any Title IV federal student aid. For public institutions, include only those who paid the in-state or in-district tuition rate.



*For public institutions, include only those students paying the in-state or in-district tuition rate. For program reporters, include only those students enrolled in the institution's largest program.

COA Revisions
Revisions to Cost of Attendance (COA) used to calculate the net price of attendance can be made in this component.

Consult the instructions and screens to make sure you are reporting the correct aid amounts for the correct groups of students.

College Affordability and Transparency Lists
Net price amounts calculated in SFA will be used to populate the U.S. Department of Education's College Affordability and Transparency lists.

Interactive Edits and Error Messages
SFA contains interactive edits that will check for blank fields, invalid values, or values that fall outside expected ranges. Some error messages will require you to confirm or explain the values that you entered. Some error messages are fatal and will require you to contact the IPEDS Help Desk at (877) 225-2568 for resolution.

Context Boxes

You will find optional text boxes throughout SFA. Context boxes allow you to provide more information about the data you enter. Some of these context boxes may be made available to the public on College Navigator, so make sure that the information you enter can be understood easily by students, parents, and the general public.

Resources
To download the survey materials for this component: Survey Materials

Section 1: Part A

Part A - Establish Your Groups

Part A establishes the number of students in various groups. Note that the numbers on this screen will be carried forward to other parts of the Student Financial Aid component.

In the fields below, report the number of students in each of the following groups.

		July 1, 2018-June 30, 2019	YOUR PRIOR YEAR DATA 2017-18
01	**Group 1** All undergraduate students		
02	**Group 2** Of those in Group 1, those who are full-time, first-time degree/certificate-seeking		
02a	Of those in Group 2, those who were awarded any Federal Work Study, loans to students, or grant or scholarship aid from the federal government, state/local government, the institution, or other sources known to the institution		
02b	Of those in Group 2, those who were awarded any loans to students or grant or scholarship aid from the federal government, state/local government, or the institution		
03	**Group 3** Of those in Group 2, those enrolled in your institution's largest program **paying the in-state or in-district tuition rate** who were awarded grant or scholarship aid from the following sources: the federal government, state/local government, or the institution		
04	**Group 4** Of those in Group 2, those enrolled in your institution's largest program **paying the in-state or in-district tuition rate** who were awarded any Title IV federal student aid		

Section 1: Part B

Part B – Enter Information about Group 1

Group 1 students are **ALL undergraduate** students (including first-time students) enrolled any time during the academic year 2018-19.

For this part, report:

For These Students	The Following Type(s) of Aid	Awarded in This Period

• **All undergraduate** students	• Grant or scholarship aid from:
	  ○ federal government
	  ○ state/local government
	  ○ the institution
	  ○ other sources known to the institution
	• Loans to students from:
	  ○ the federal government
		• Any time during academic year 2018-19 (the aid year period from July 1, 2018 through June 30, 2019)

In the fields below, report the number of Group 1 students and the total amount of aid awarded to these students for each type of aid.

Information from Part A:	**2018-19**
Group 1 **All undergraduate** students (This number is carried forward from Part A, Line 01)	

	Aid Type	**2018-19**			
		Number of Group 1 students who were awarded aid	**Percentage of Group 1 students who were awarded aid**	**Total amount of aid awarded to Group 1 students**	**Average amount of aid awarded to Group 1 students**
01	Grant or scholarship aid from the federal government, state/local government, the institution, and other sources known to the institution **(Do NOT include federal student loans)**				
	02 Pell Grants				
03	Federal student loans				

The notes below provide context for the data you've reported above and may be posted on the College Navigator website. Choose one option that best explains your data or choose "Non-applicable" if you do not wish to provide context notes. If none of the options provided explain your institution's data, then choose "Other" and write your own context notes. Notes should be written to be understood by students and parents. For example, institutions may report here other sources of private aid not included in the categories listed.

Non-applicable

Part C, Page 2 - Enter Information about Group 2

Part C includes financial aid information about Group 2. Group 2 students are all full-time, first-time degree/certificate-seeking undergraduate students enrolled any time during academic year 2018-19.

For this part, report:

For These Students	The Following Type(s) of Aid	Awarded in This Period
• Full-time, first-time degree/certificate-seeking undergraduate students enrolled any time during academic year 2018-19	• Grant or scholarship aid from: ◦ federal government ◦ state/local government ◦ the institution • Loans to students from: ◦ the federal government ◦ other sources, including private or other loans • Do **not** include: ◦ grant or scholarship aid from private or other sources ◦ PLUS loans or loans made to anyone other than the student	• Any time during academic year 2018-19 • For program reporters, this is the aid year period from July 1, 2018 through June 30, 2019.

In the fields below, report the number of Group 2 students and the total amount of aid awarded to these students for each type of aid. Enter unduplicated student counts within a category (e.g., Pell Grants). However, a student can appear in more than one aid category.

Information from Part A:	**2018-19**
Group 2 (This number is carried forward from Part A, Line 02) Full-time, first-time degree/certificate-seeking undergraduates	
Group 2a (This number is carried forward from Part A, Line 02a) Of those in Group 2, those who were awarded: -Federal Work Study -loans to students -grant or scholarship aid from the federal government, state/local government, or the institution -other sources known to the institution	
Group 2b (This number is carried forward from Part A, Line 02b) Of those in Group 2, those who were awarded: -loans to students -grant or scholarship aid from the federal government, state/local government, or the institution	
Group 3 (This number is carried forward from Part A, Line 03) Of those in Group 2, those who **paid the in-state or in-district tuition rate and** were awarded: -grant or scholarship aid from the federal government, state/local government, or the institution	

Aid Type	**2018-19**				**YOUR PRIOR YEAR DATA**
					2017-18
	Number of Group 2 students who were awarded aid	**Percentage of Group 2 students who were awarded aid**	**Total amount of aid awarded to Group 2 students**	**Average amount of aid awarded to Group 2 students**	**Average amount of aid awarded to Group 2 students**
01 Grants or scholarships from the federal government, state/local government, or the institution					
02 Federal grants					
02a Pell Grants					
02b Other federal grants					
03 State/local government grants or scholarships (includes fellowships/tuition waivers/exemptions)					
04 Institutional grants or scholarships (includes fellowships/tuition waivers/exemptions)					
05 Loans to students					
05a Federal loans					
05b Other loans (including private loans)					

The notes below provide context for the data you've reported above and may be posted on the College Navigator website. Choose one option that best explains your data or choose "Non-applicable" if you do not wish to provide context notes. If none of the options provided explain your institution's data, then choose "Other" and write your own context notes. Notes should be written to be understood by students and parents. For example, institutions may report here other sources of private aid not included in the categories listed.

Non-applicable

Section 1: Comparison Chart

Comparison Chart

Based on the information reported on the previous screens for Group 1 (all undergraduates) and Group 2 (full-time, first-time degree/certificate-seeking undergraduates), this comparison chart seeks to help institutions check their reported data. Assuming that the information on Groups 1 and 2 is correct, then the calculated fields for 'All Other Undergraduates' should be the balance (Group 1 minus Group 2). If the balance does not check with your institution's calculations, please correct your reported numbers for Groups 1 and 2 before moving forward with the completion of the SFA survey component.

Note: Data for the 'All Other Undergraduates' will appear in the IPEDS Data Center for data users, but not in College Navigator.

		Number of students	Pell grants	Federal Student Loans
01	**Group 1 (all undergraduates)**			
02	Number of students who were awarded aid			
03	Percentage who were awarded aid			
04	Total amount of aid awarded			
05	Average amount of aid awarded			
06	**Group 2 (Full-time, first-time undergraduates)**			
07	Number of students who were awarded aid			
08	Percentage who were awarded aid			
09	Total amount of aid awarded			
10	Average amount of aid awarded			
11	**All other undergraduates (Line 01 - Line 06)**			
12	Number of students who were awarded aid (Line 02 - Line 07)			
13	Percentage who were awarded aid (Line 12 / Line 11)			
14	Total amount of aid awarded (Line 04 - Line 09)			
15	Average amount of aid awarded (Line 14 / Line 12)			

Section 1: Cost of Attendance

Cost of attendance			
These numbers are carried forward from Institutional Characteristics and should only be changed if an error was made in the reporting.			
CIP CODE OF LARGEST PROGRAM			
TITLE OF LARGEST PROGRAM			
Total length of PROGRAM **in WEEKS, as completed by a student attending full-time**			
Total length of ACADEMIC YEAR (as used to calculate your Pell budget) **in WEEKS**			
Published student charges **for the entire program**	**2016-17**	**2017-18**	**2018-19**
Tuition and required fees **for the entire program** (public program reporters report the lowest of in-district or in-state, if applicable)			
Books and supplies **for the entire program**			

The following numbers need to be reported for **4 weeks (1 month)**.

The correct numbers should be available from your financial aid office. Off-campus numbers should be based on costs for your area, not on national averages.

On-campus:			
Room and board **for 4 weeks (1 month)**			
Other expenses **for 4 weeks (1 month)**			
Room and board and other expenses **for 4 weeks (1 month)**			
Off-campus (not with family):			
Room and board **for 4 weeks (1 month)**			
Other expenses **for 4 weeks (1 month)**			
Room and board and other expenses **for 4 weeks (1 month)**			
Off-campus (with family):			
Other expenses **for 4 weeks (1 month)**			

Section 1: Cost of Attendance (calculated)

Cost of attendance			
These numbers are carried forward from Institutional Characteristics and should only be changed if an error was made in the reporting.			
CIP CODE OF LARGEST PROGRAM			
TITLE OF LARGEST PROGRAM			
Published student charges **for the entire program**	**2016-17**	**2017-18**	**2018-19**
Tuition and required fees			
Books and supplies			
On-campus:			
Room and board			
Other expenses			
Room and board and other expenses			
Off-campus (not with family):			
Room and board			
Other expenses			
Room and board and other expenses			
Off-campus (with family):			
Other expenses			

Section 1: Part D

Part D - Enter Information about Group 3

Group 3 students are all full-time, first-time degree/certificate-seeking undergraduate students enrolled in your institution's largest program any time during academic year 2018-19 **paying the in-state or in-district tuition rate** who were awarded grant or scholarship aid from the following sources: the federal government, state/local government, or the institution. The information you report in this part will be used in Part F to calculate average institutional net price.

Note:
In this part, you must report information for your institution's largest program. Your largest program is the program with the most number of undergraduate students enrolled. You must provide three years' worth of data for your largest program.

For this part, report:

For These Students	The Following Type(s) of Aid	Awarded in This Period

• Full-time, first-time degree/certificate-seeking undergraduate students enrolled in your institution's largest program **paying the in-state or in-district tuition rate** who were awarded grant or scholarship aid from the following sources: the federal government, state/local government, or the institution
• Do **not** include students who were awarded only grant or scholarship aid from private or other sources, or students who were awarded only non-grant aid
	• Grant or scholarship aid from:
	  ○ federal government
	  ○ state/local government
	  ○ the institution
	• Do **not** include grant or scholarship aid from private or other sources
		• Any time during academic year 2018-19 (the aid year period from July 1, 2018 through June 30, 2019)

In the fields below, report the number of Group 3 students with each type of living arrangement and the total amount of grant or scholarship aid from the federal government, state/local government, or the institution awarded to these students.

Largest Program Information from the IPEDS Institutional Characteristics component	**2018-19**
CIP Code	
Title	

Information from Part A:	**YOUR PRIOR YEAR DATA 2016-17**	**YOUR PRIOR YEAR DATA 2017-18**	**2018-19**
Group 3 Full-time, first-time degree/certificate-seeking undergraduate students enrolled in your institution's largest program **paying the in-state or in-district tuition rate** who were awarded grant or scholarship aid from the following sources: the federal government, state/local government, or the institution (This number is carried forward from Part A, Line 03)			

			YOUR PRIOR YEAR DATA 2016-17	**YOUR PRIOR YEAR DATA 2017-18**	**2018-19**
01	**Report the number of Group 3 students with the following living arrangements:**				
	01a	On-campus			
	01b	Off-campus (with family)			
	01c	Off-campus (not with family)			
	01d	Unknown (calculated) This value is calculated using the following formula: [A03-(D01a+D01b+D01c)]			
02	**Report the total amount of grant or scholarship aid from the federal government, state/local government, or the institution awarded to Group 3 students**				
03	Average grant or scholarship aid from the federal government, state/local government, or the institution awarded to Group 3 students (calculated value). This value is calculated using the following formula: [D02/A03]				

The notes below provide context for the data you've reported above and may be posted on the College Navigator website. Choose one option that best explains your data or choose "Non-applicable" if you do not wish to provide context notes. If none of the options provided explain your institution's data, then choose "Other" and write your own context notes. Notes should be written to be understood by students and parents. For example, institutions may report here other sources of private aid not included in the categories listed.

Non-applicable

Section 1: Part E

Part E – Enter Information about Group 4

Group 4 students are full-time, first-time degree/certificate-seeking undergraduate students enrolled in your institution's largest program any time during academic year 2018-19 **paying the in-state or in-district tuition rate** who were awarded any Title IV federal student aid. The information you report in this part will be used in Part G to calculate average institutional net price by income level.

Note:
In this part, you must report information for your institution's largest program. Your largest program is the program with the most number of undergraduate students enrolled. You must provide three years' worth of data for your largest program.

For this part report:

For These Students	The Following Type(s) of Aid	Awarded in This Period
• Full-time, first-time degree/certificate-seeking undergraduate students enrolled in your institution's largest program **paying the in-state or in-district tuition rate** who were awarded any Title IV federal student aid	• Grant or scholarship aid from: ◦ federal government ◦ state/local government ◦ institution • Do **not** include: ◦ grant or scholarship aid from private or other sources ◦ loan amounts ◦ Federal Work Study amounts	• Any time during academic year 2018-19 (the aid year period from July 1, 2018 through June 30, 2019)

In the fields below, report the number of Group 4 students with each type of living arrangement and the total amount of grant or scholarship aid from the federal government, state/local government, or the institution awarded to these students by income level.

Largest program:
CIP Code
Title

Information from Part A:	**YOUR PRIOR YEAR DATA 2016-17**	**YOUR PRIOR YEAR DATA 2017-18**	**2018-19**
Group 4 Full-time, first-time degree/certificate-seeking undergraduate students enrolled in your institution's largest program **paying the in-state or in-district tuition rate** who were awarded any Title IV federal student aid (This number is carried forward from Part A, Line 04)			

			YOUR PRIOR YEAR DATA 2016-17	**YOUR PRIOR YEAR DATA 2017-18**	**2018-19**
01	**Report the number of Group 4 students with the following living arrangements:**				
	01a	On-campus			
	01b	Off-campus (with family)			
	01c	Off-campus (not with family)			
	01d	Unknown (calculated) This value is calculated using the formula: [A04-(E01a+E01b+E01c)]			

			Number of students who were awarded any Title IV aid (Group 4)	**Of those in Column 1, the number who were awarded any grant or scholarship aid from the following sources: the federal government, state/local government, or the institution**	**Of those in Column 1, the total amount of grant or scholarship aid awarded from the following sources: the federal government, state/local government, or the institution**	**Average amount of federal, state/local, and institutional grant or scholarship aid awarded to Group 4 students**
			2016-17			
			Col. 1	**Col. 2**	**Col. 3**	**Col. 4**
02	**Income level**					
	02a	**$0-30,000**				
	02b	**$30,001-48,000**				
	02c	**$48,001-75,000**				
	02d	**$75,001-110,000**				
	02e	**$110,001 and more**				
	02f	**Total all income levels**				

			2017-18			
			Col. 1	Col. 2	Col. 3	Col. 4
03	Income level					
	03a	$0-30,000				
	03b	$30,001-48,000				
	03c	$48,001-75,000				
	03d	$75,001-110,000				
	03e	$110,001 and more				
	03f	Total all income levels				
			2018-19			
			Col. 1	Col. 2	Col. 3	Col. 4
04	Income level					
	04a	$0-30,000				
	04b	$30,001-48,000				
	04c	$48,001-75,000				
	04d	$75,001-110,000				
	04e	$110,001 and more				
	04f	Total all income levels				

The notes below provide context for the data you've reported above and may be posted on the College Navigator website. Choose one option that best explains your data or choose "Non-applicable" if you do not wish to provide context notes. If none of the options provided explain your institution's data, then choose "Other" and write your own context notes. Notes should be written to be understood by students and parents. For example, institutions may report here other sources of private aid not included in the categories listed.

Non-applicable

Section 1: Part F

Part F - Net Price Calculation for Group 3

The following net price calculation is based on information that your institution reported in the Institutional Characteristics component and the Student Financial Aid component. For more information about data your institution reported in the Institutional Characteristics component, please contact your institution's IPEDS Keyholder.

			YOUR PRIOR YEAR DATA 2016-17	YOUR PRIOR YEAR DATA 2017-18	2018-19
	Components of cost of attendance Please note: Net price calculations use ACADEMIC YEAR costs, not full program costs				
	Largest program:				
	CIP Code				
	Title				
01	Published tuition and required fees				
02	Books and supplies				
03	**Room and board and other expenses by living arrangement**				
	03a	On-campus			
	03b	Off-campus (with family)			
	03c	Off-campus (not with family)			
04	**Number of Group 3 students by living arrangement**				
	04a	On-campus			
	04b	Off-campus (with family)			
	04c	Off-campus (not with family)			
	04d	Unknown			
05	**Weighted average for room and board and other expenses by living arrangement (excluding unknown values)** See instructions for the formula for this calculation				
06	**Total cost of attendance** This value is calculated using the following formula: [F01+F02+F05]				
07	**Average amount of grant or scholarship aid awarded to Group 3 students from the following sources: the federal government, state/local government, and the institution**				
08	**Average institutional net price for Group 3 students** This value is calculated using the following formula: [F06-F07]				

As required by the *Higher Education Act, as amended (2008)*, these amounts will be posted on the U.S. Department of Education's College Navigator website and used in the U.S. Department of Education's College Affordability and Transparency Lists.

The notes below provide context for the data you've reported above and may be posted on the College Navigator website. Choose one option that best explains your data or choose "Non-applicable" if you do not wish to provide context notes. If none of the options provided explain your institution's data, then choose "Other" and write your own context notes. Notes should be written to be understood by students and parents. For example, institutions may report here other sources of private aid not included in the categories listed.

Non-applicable

Section 1: Part G

Part G - Net Price Calculation for Group 4

The following net price calculation is based on information that your institution reported in the Institutional Characteristics component and the Student Financial Aid component. For more information about data your institution reported in the Institutional Characteristics component, please contact your institution's IPEDS Keyholder.

			YOUR PRIOR YEAR DATA 2016-17	YOUR PRIOR YEAR DATA 2017-18	2018-19
	Components of cost of attendance Please note: Net price calculations use ACADEMIC YEAR costs, not full program costs				
	Largest program:				
	CIP Code				
	Title				
01	Published tuition and required fees				
02	Books and supplies				
03	**Room and board and other expenses by living arrangement**				
	03a	On-campus			
	03b	Off-campus (with family)			
	03c	Off-campus (not with family)			
04	**Number of Group 4 students by living arrangement**				
	04a	On-campus			
	04b	Off-campus (with family)			
	04c	Off-campus (not with family)			
	04d	Unknown			
05	**Weighted average for room and board and other expenses by living arrangement (excluding unknown values)** See instructions for the formula for this calculation				
06	**Total cost of attendance** This value is calculated using the following formula: [G01+G02+G05]				
07	**Average amount of grant or scholarship aid awarded to Group 4 students from the following sources: the federal government, state/local government, and the institution.**				
	07a	**$0-30,000**			
	07b	**$30,001-48,000**			
	07c	**$48,001-75,000**			
	07d	**$75,001-110,000**			
	07e	**$110,001 and more**			
08	**Average institutional net price for Group 4 students** This value is calculated using the following formula: [G06-G07]				
	08a	**$0-30,000**			
	08b	**$30,001-48,000**			
	08c	**$48,001-75,000**			
	08d	**$75,001-110,000**			
	08e	**$110,001 and more**			

As required by the *Higher Education Act, as amended (2008)*, these amounts will be posted on the U.S. Department of Education's College Navigator website.

The notes below provide context for the data you've reported above and may be posted on the College Navigator website. Choose one option that best explains your data or choose "Non-applicable" if you do not wish to provide context notes. If none of the options provided explains your institution's data, then choose "Other" and write your own context notes. Notes should be written to be understood by students and parents. For example, institutions may report here other sources of private aid not included in the categories listed.

Non-applicable

Section 2: Military Servicemembers and Veteran's Benefits - Undergraduate and Graduate

Section 2: Military Servicemembers and Veteran's Benefits

IMPORTANT NOTE: Report for **Post-9/11 GI Bill Benefits: July 1, 2018 - June 30, 2019** and Report for **Department of Defense Tuition Assistance Program: October 1, 2018 - September 30, 2019**

Program reporters should be reporting the information on this screen for ALL programs (not just the largest program).

- Report the total number of student recipients and the total dollar amounts for each program.
- Student recipients can also include eligible dependents.
- Consult with your campus certifying official, who may not be in the student financial aid office.
- For Post-9/11 GI Bill Benefits, do not include the matching institutional aid provided through the Yellow Ribbon Program if your school participated.
- Information reported to IPEDS is only what is known to the institution.
- Enter zero (0) if your institution did not have beneficiaries for that student level or program. Please do not leave a cell blank.

				YOUR PRIOR YEAR DATA
Type of benefit/assistance	**Number of students receiving benefits/assistance**	**Total dollar amount of benefits/assistance disbursed through the institution**	**Average dollar amount of benefits/assistance disbursed through the institution**	**Average dollar amount of benefits/assistance disbursed through the institution**
Post-9/11 GI Bill Benefits				
Undergraduate students				
Graduate students				
Total				
Department of Defense Tuition Assistance Program				
Undergraduate students				
Graduate students				
Total				

Prepared by

The name of the preparer is being collected so that we can follow up with the appropriate person in the event that there are questions concerning the data. The Keyholder will be copied on all email correspondence to other preparers.

The time it took to prepare this component is being collected so that we can continue to improve our estimate of the reporting burden associated with IPEDS. Please include in your estimate the time it took for you to review instructions, query and search data sources, complete and review the component, and submit the data through the Data Collection System.

Thank you for your assistance.

This survey component was prepared by:

○ Keyholder	○ SFA Contact	○ HR Contact
○ Finance Contact	○ Academic Library Contact	○ Other

Name: _____

Email: _____

How many staff from your institution only were involved in the data collection and reporting process of this survey component?

_____ Number of Staff (including yourself)

How many hours did you and others from your institution only spend on each of the steps below when responding to this survey component?

Exclude the hours spent collecting data for state and other reporting purposes.

Staff member	Collecting Data Needed	Revising Data to Match IPEDS Requirements	Entering Data	Revising and Locking Data
Your office	_____ hours	_____ hours	_____ hours	_____ hours
Other offices	_____ hours	_____ hours	_____ hours	_____ hours

Student Financial Aid, Public Program Reporters

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The SFA component has expanded from gathering data on only undergraduate survey component to all students (undergraduates and graduate students) because of the new question on military servicemembers and veterans' educational benefits. The survey instructions that follow are divided into two sections. Section 1 discusses the portion of the SFA component that asks questions about your undergraduate students only. Section 2 explains the portion of the SFA component that ask questions about your military and veteran students. As you complete both sections of SFA, please refer to the "Where to Get Help" and "Where the Data Will Appear" sections.

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Where to Get Help with Reporting

IPEDS Help Desk

Phone: (877) 225-2568
E-mail: ipedshelp@rti.org

Web Tutorials

You can consult the IPEDS Website's Trainings & Outreach page which contains several tutorials on IPEDS data collection, a self-paced overview of IPEDS tools, and other valuable resources.

IPEDS Resource Page

The IPEDS Website's Reporting Tools page contains frequently asked questions, a link to data tip sheets, tutorials, taxonomies, information centers (e.g., academic libraries, average net price, human resources, race/ethnicity, etc.), and other valuable information.

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Where the Reported Data Will Appear

Data collected through IPEDS will be accessible at the institution and aggregate levels.
At the institution-level, data will appear in the:

- College Navigator Website
- IPEDS Data Center
- IPEDS Data Feedback Reports
- College Affordability and Transparency Center Website

At the aggregate-level, data will appear in:

- IPEDS Data Explorer
- IPEDS Data Feedback Reports
- The Digest of Education Statistics
- The Condition of Education

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Section 1. SFA - Undergraduate Students

Purpose of Component

The purpose of the IPEDS Student Financial Aid (SFA) component is to collect information about financial aid provided to various groups of undergraduate students in order to meet requirements of the *Higher Education Act of 1965* (HEA), as amended. Item areas include:

- Financial aid about all undergraduate students
- Financial aid about all full-time, first-time degree/certificate-seeking students
- Financial aid and living arrangement information about all full-time, first-time degree/certificate-seeking students who were awarded grant aid. For public institutions, this includes only students who paid the in-state or in-district tuition rate. For program reporters, this includes only students enrolled in the institution's largest program.
- Financial aid and living arrangement information about all full-time, first-time degree/certificate-seeking students who were awarded any Title IV federal student aid by income. For public institutions, this includes only students who paid the in-state or in-district tuition rate. For program reporters, this includes only students enrolled in the institution's largest program.
- Net Price Calculation for full-time, first-time degree/certificate-seeking students who were awarded grant aid. For public institutions, this includes only students who paid the in-state or in-district tuition rate. For program reporters, this includes only students enrolled in the institution's largest program.
- Net Price Calculation for full-time, first-time degree/certificate-seeking students who were awarded any Title IV federal student aid by income. For public institutions, this includes only students who paid the in-state or in-district tuition rate. For program reporters, this includes only students enrolled in the institution's largest program.

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Who Must Report

Institutions that had undergraduate students enrolled during the prior academic year must report.

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Changes in reporting

The following changes were implemented for the 2019-20 data collection period:

- There is a new instruction to exclude students participating in Experimental Pell

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General Instructions

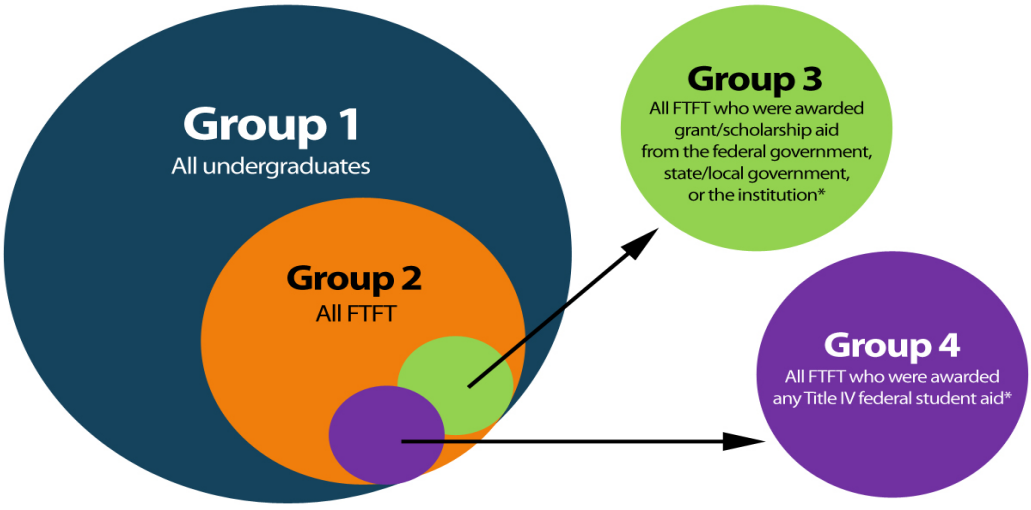
What You Will Need

The institution's financial aid system should be the beginning basis for reporting to this IPEDS component. Data providers for this component should be familiar with college and university practices associated with student financial aid. In general, there are two types of financial aid data that will be requested in this component. These types are:

- Numbers of students that meet certain conditions
- Total aid dollars awarded to these students

To complete this component, data providers will need the following:
1. Financial aid information about the following student groups:

- **Group 1.** All undergraduate students
- **Group 2.** Of the students in Group 1, those who are full-time, first-time degree/certificate-seeking students
- **Group 3.** Of the students in Group 2, those enrolled in the institution's largest program who paid the in-state or in-district tuition rate and were awarded grant or scholarship aid from the following sources: the federal government, state/local government, or the institution.
- **Group 4.** Of the students in Group 2, those enrolled in the institution's largest program who paid the in-state or in-district tuition rate and were awarded Title IV federal student aid.



*For public institutions, include only those students paying the in-state or in-district tuition rate. For program reporters, include only those students enrolled in the institution's largest program.

2. Living arrangement information for full-time, first-time degree/certificate-seeking undergraduate students enrolled in the institution's largest program who paid the in-state or in-district tuition rate and were awarded grant or scholarship aid during the reporting period.
3. Living arrangement information for full-time, first-time degree/certificate-seeking undergraduate students enrolled in the institution's largest program who paid the in-state or in-district tuition rate and were awarded Title IV federal student aid during the reporting period.
4. Income levels for full-time, first-time degree/certificate-seeking undergraduate students enrolled in the institution's largest program who paid the in-state or in-district tuition rate and were awarded Title IV federal student aid during the reporting period.

About the Data

Five different types of data appear in this component. There are data:

- That institutions provide from their own financial aid records
- That are prior year data, shown in red, which can be used as a comparison with the current year's data being reported
- That are carried forward from the IPEDS Institutional Characteristics (IC) component and the IPEDS 12-month Enrollment (E12) component that your institution completed in the most recent collections of those components.
- That are carried forward from one part of the Student Financial Aid component to another part to ensure that the data are internally consistent
- That are calculated from the other data elements

In the latter two cases, the data provider should check that the data that are carried forward and calculated are consistent with the data in the institution's underlying financial aid records. If the data carried forward or calculated are not consistent with the institution's records, then an error in data entry may have occurred.

Context Boxes

Optional context boxes throughout the component allow institutions to provide more information regarding reported data. Note that the information in these context boxes may be posted on the U.S. Department of Education's College Navigator website. NCES will review entries in these context boxes for applicability and appropriateness before posting them on College Navigator. However, institutions should ensure that entries in these context boxes are free from grammatical and spelling errors and are written to be understood by students and parents.

Interactive Edits

This component contains interactive edits that will check for blank fields, invalid values, or values that fall outside expected ranges. Some error messages will require you to confirm or explain the values that you entered. Some error messages are fatal and will require you to contact the IPEDS Help Desk at (877) 225-2568 or ipedshelp@rti.org for resolution.

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Coverage

Reporting Period

The data reported for this component should be for the prior academic year. For the purposes of reporting to SFA, the aid year period runs from July 1 through June 30.
Program reporters will report students' aid data for an institutionally defined academic year. This is the academic year length, in weeks, used by your institution to calculate your Pell budget. It must begin within the aid year period specified above and will vary from student to student depending on when he or she enrolled.

Student Cohort

The student cohort covered by this component includes undergraduate students enrolled any time during the prior academic year (the aid year period from July 1 through June 30).

What to Include

The following types of financial aid should be reported in this component:

- **Federal grants (grants/educational assistance funds):** Grants provided by federal agencies such as the U.S. Department of Education, including Title IV federal student aid grants such as Pell grants, Federal Supplemental Educational Opportunity Grants (FSEOG), Academic Competitiveness Grants (ACG), National Science and Mathematics Access to Retain Talent (National SMART) Grants, and Teacher Education Assistance for College and Higher Education (TEACH) Grants. Also include need-based and merit-based educational assistance funds and training vouchers provided from other federal agencies and/or federally-sponsored educational benefits programs.
  Do not include veterans education benefits, as defined in section 480(c) of the HEA, as they are no longer treated as Estimated Financial Assistance (EFA) for the Office of Federal Student Aid's purposes. For more information, visit https://ifap.ed.gov/eannouncements/081309GuidFedVeteransEdBenefits.html.
- **Federal loans to students:** Monies from the federal government that must be repaid for which the student is the designated borrower. This type of aid includes all Title IV federal student loan aid such as Federal Perkins Loans, Subsidized Direct or FFEL Stafford Loans, and Unsubsidized Direct or FFEL Stafford Loans. Do not include PLUS loans and other federal loans not made directly to the student.
- **State/local government grants (grants/scholarships/waivers):** Grants that were awarded by your state such as Leveraging Educational Assistance Partnerships (LEAP) (formerly SSIGs) and Robert C. Byrd Honors Scholarships. Include merit-based grants or scholarships that were provided by your state or local government. Also include tuition and fee waivers for which your institution was reimbursed by a state or local government agency.
- **Institutional grants or scholarships (scholarships/waivers):** Grants, scholarships, and fellowships granted and funded by the institution and/or individual departments within the institution and are limited to students attending your institution. Also include scholarships targeted to certain individuals (e.g., based on state of residence, major, or participation in athletic activities) for which the institution designates the recipient. Also include institutional tuition and fee waivers for which your institution was not reimbursed by a state or local government agency. This is not intended to include Federal Work Study.
- **Private grants or scholarships:** Grants or scholarships to students that are awarded and paid by an outside organization but are directed through the institution's financial aid office (e.g., Rotary Club Scholarship).
- **Private loans to students:** Monies that must be repaid to the lending institution for which the student is the designated borrower. Include all institutionally and privately sponsored loans. Do not include loans that are not made directly to the student.

NOTE: In this component, "aid awarded" refers to grant or scholarship aid that was awarded to students or to loans awarded to and accepted by students. For reporting grant or scholarship aid, institutions should report on aid that was awarded to students. This amount may be different from the amount that was actually disbursed to students. For example, a student may be awarded grant or scholarship aid at the beginning of the academic year but then leave the institution before the entire amount is disbursed. In this case, institutions should report the original amount of grant or scholarship aid that was awarded. For reporting loans to students, institutions should continue to report on loans that were awarded to and accepted by the student.

Note also that different types of financial aid should be reported for different groups of students. Please review the instructions and the screens carefully to ensure that you are reporting the correct types of financial aid in the appropriate parts.
Institutions need to report aid in this component such that the net price calculations shown on College Navigator and used for the College Affordability and Transparency lists are a reflection of what students actually pay.
In cases where a student is awarded aid for multiple institutionally defined academic years within one aid year period, institutions should report only aid awarded for the student's first institutionally defined academic year.
For total aid amounts, report to the nearest whole dollar and omit cents. For student counts, an unduplicated count should be given within a given aid category (e.g., Pell grants). However, a student can appear in more than one aid category.

What NOT to Include

Do not report student counts or aid amounts for the following:

- Students who were **only** graduate students at the institution during the reporting period
- Students who were enrolled **exclusively** in courses not creditable toward a certificate/degree
- Students who were enrolled **exclusively** in Continuing Education Units (CEUs)
- Students who were **exclusively** auditing classes
- Students in Experimental Pell programs

Do not report:

- Federal Work Study amounts into any total aid amounts
- ROTC aid, which are excluded from EFA calculations, in any total aid amounts
- Loans that are made to someone other than the student
- Military/veterans aid in Section 1 because such aid is ONLY reported in Section 2
- Experimental Pell grant amounts

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Detailed Instructions

This section provides line-by-line instructions for each part of the Student Financial Aid component.

Part A - Establish Your Groups

Part A establishes the number of students in various groups. Note that the data you report on this screen will be carried forward to other parts of the Student Financial Aid component.
Instructions:
In the fields provided, report the number of students in each of the following groups:

Item **Description**

01. **Group 1**
All undergraduate students

Report the number of all undergraduate students who were enrolled any time during the prior academic year. Include all new and continuing undergraduate students (full-time students, part-time students, degree/certificate-seeking students, non-degree/certificate-seeking students, and all others). This number will be preloaded from your institution's IPEDS 12-month Enrollment component, but it may be modified if necessary. If you have questions about the value that has been preloaded in this field, please contact your institution's IPEDS Keyholder.

02. **Group 2**
Of those in Group 1, those who are full-time, first-time degree/certificate-seeking

Report the number of students who are full-time, first-time degree/certificate-seeking undergraduates.

02a. **Of those in Group 2, those who were awarded any Federal Work Study; loans to students; or grant or scholarship aid from the federal government, state/local government, the institution, or other sources known to the institution**

Report the number of students who were awarded any of the following:
- Federal Work Study;
- Government and/or private loans to students;
- Grant or scholarship aid from the federal government, state/local government, or the institution; or

- Grant or scholarship aid from other sources known to the institution, such as aid from private sources (e.g., Rotary Club Scholarship).

Note that the students reported in Line 02a are not defined as a particular group because no additional financial aid information will be collected about these students.

02b. Of those in Group 2, those who were awarded any loans to students or grant or scholarship aid from the federal government, state/local government, or the institution

Report the number of students who were awarded any of the following:

- Government and/or private loans to students; or
- Grant or scholarship aid from the federal government, state/local government, or the institution.

Note that the students reported in Line 02b are not defined as a particular group because no additional financial aid information will be collected about these students.

03. Group 3
Of those in Group 2, those enrolled in your institution's largest program who were awarded grant or scholarship aid from the following sources: the federal government, state/local government, or the institution

For public institutions, include only those students who paid the in-state or in-district tuition rate. Report students who were awarded grant or scholarship aid from the following sources: the federal government, state/local government, or the institution. Do not include students who were awarded aid only from other sources.

04. Group 4
Of those in Group 2, those enrolled in your institution's largest program who were awarded any Title IV federal student aid

For public institutions, include only those students who paid the in-state or in-district tuition rate. Report students who were awarded any Title IV federal student aid (i.e., report students who were awarded federal grant aid or who were awarded federal work study or federal student loans).

Title IV federal student aid includes:

- Federal Pell Grant, Federal Supplemental Educational Opportunity Grant (FSEOG), Academic Competitiveness Grant (ACG), National Science and Mathematics Access to Retain Talent Grant (National SMART Grant), Teacher Education Assistance for College and Higher Education (TEACH) Grant
- Federal Work Study
- Federal Perkins Loan, Subsidized Direct or FFEL Stafford Loan, and Unsubsidized Direct or FFEL Stafford Loan

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Part B - Financial Aid About Group 1

This part is intended to collect information about the number of Group 1 students and the total amounts of aid they were awarded by different aid types. Group 1 students are all undergraduate students enrolled any time during the prior academic year.
For this part, report:

For These Students	The Following Type(s) of Aid	Awarded in This Period
• All undergraduate students	• Grant or scholarship aid from the federal government • Grant or scholarship aid from state/local government • Grant or scholarship aid from the institution • Grant or scholarship aid from other sources known to the institution	• Any time during the prior academic year (the aid year period from July 1 through June 30)

	• Loans to students from the federal government

Data carried forward from Part A include the following:

Information from Part A:	Prior Academic Year
Group 1 All undergraduate students (This number is carried forward from Part A, Line 01)	Carried forward from Part A

Instructions:
In the fields provided, report the number of Group 1 students and the total amount of aid awarded to these students for each type of aid.

Item **Description**

01. **Grant or scholarship aid from the federal government, state/local government, the institution, and other sources known to the institution**

Column 1. Report the number of students in Group 1 who were awarded grant or scholarship aid from the federal government, state/local government, the institution, and other sources known to the institution.

Column 2. The percentage of students in Group 1 who were awarded grant or scholarship aid is calculated for you.

Column 3. Report the total dollar amount of grant or scholarship aid from the federal government, state/local government, the institution, and other sources known to the institution awarded to Group 1 students.

Column 4. The average amount of grant or scholarship aid awarded to Group 1 students is calculated for you.

02. **Pell grants**

Column 1. Report the number of Group 1 students who were awarded Pell grants. Do not include any other type of federal grant aid (e.g., Academic Competitiveness Grants).

Column 2. The percentage of Group 1 students who were awarded Pell grants is calculated for you.

Column 3. Report the total dollar amount of Pell grants awarded to Group 1 students. Do not include any other type of federal grant aid (e.g., Academic Competitiveness Grants).

Column 4. The average amount of Pell grants awarded to Group 1 students is calculated for you.

03. **Federal student loans**

Column 1. Report the number of Group 1 students who were awarded federal loans to students. Do not include any other type of federal loans (e.g., PLUS loans, which are made to the parent of a student).

Column 2. The percentage of Group 1 students who were awarded federal student loans is calculated for you.

Column 3. Report the total dollar amount of federal student loans awarded to Group 1 students. Do not include any other type of federal loans (e.g., PLUS loans, which are made to the parent of a student).

Column 4. The average amount of federal student loans awarded to students in Group 1 is calculated for you.

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Part C, Page 2 - Enter Financial Aid About Group 2

This part is intended to collect information about the number of Group 2 students and the total amounts of aid they were awarded by different aid types. For academic reporters, Group 2 students are all full-time, first-time degree/certificate-seeking undergraduate students enrolled in the prior Fall. For program reporters, Group 2 students are all full-time, first-time degree/certificate-seeking undergraduate students enrolled any time during the prior academic year.

For this part, report:

For These Students	The Following Type(s) of Aid	Awarded in This Period
	• Grant or scholarship aid from the federal government	• Any time during the prior academic year

• Full-time, first-time, degree/certificate-seeking undergraduate students enrolled in the prior Fall (academic reporters) or any time during the prior academic year (program reporters)	• Grant or scholarship aid from state/local government • Grant or scholarship aid from the institution • Loans to students from the federal government and from other sources, including private loans • Do **not** include grant or scholarship aid from private or other sources • Do **not** include PLUS loans or loans made to anyone other than the student	• For program reporters, this is the aid year period from July 1 through June 30.

Data carried forward from Part A include the following:

Information from Part A:	**Prior Academic Year**
Group 2a Of those in Group 2, those who were awarded any Federal Work Study, loans to students, or grant or scholarship aid from the federal government, state/local government, the institution, or other sources known to the institution (This number is carried forward from Part A, Line 02a)	Carried forward from Part A
Group 2b Of those in Group 2, those who were awarded any loans to students or grant or scholarship aid from the federal government, state/local government, or the institution (This number is carried forward from Part A, Line 02b)	Carried forward from Part A
Group 03 Of those in Group 2, those (enrolled in the largest program for program reporters) who paid the in-state or in-district tuition rate and were awarded grant or scholarship aid from the federal government, state/local government, or the institution (This number is carried forward from Part A, Line 03)	Carried forward from Part A

Note: Two aid categories in this section are further disaggregated into subcategories. Because students may be awarded more than one type of aid, the sum of the values you enter in the subcategories will not necessarily equal the value you enter in the aid category. However, the total number of students reported for the aid category cannot exceed the sum of subcategories. (For example, the number of students who were awarded federal grants cannot exceed the sum of the number of students who were awarded Pell grants and the number who were awarded other federal grants). In addition, the total number of students reported for an aid category must be at least as large as the largest of those reported in a subcategory.

Instructions:
In the fields provided, report the number of Group 2 students and the total amount of aid they were awarded for each type of aid.

Item Description

01. Grant or scholarship aid from the federal government, state/local government, and the institution

Column 1. Report the number of Group 2 students who were awarded one or more grants or scholarships from the federal government, state/local government, or the institution. If a student appears in more than one type of aid category in Lines 02 through 04, that student should only be counted once for Line 01. Do not include students who were awarded **only** grants or scholarships from private sources (e.g., Rotary Club Scholarship).

Column 2. The percentage of Group 2 students who were awarded one or more grants or scholarships from the federal government, state/local government, or the institution will be calculated for you.

Column 3. The total dollar amount for Line 01 will be calculated for you. This value is calculated using the following formula: [(Line 02, Column 3) + (Line 03, Column 3) + (Line 04, Column 3)].

Column 4. The average amount of grants or scholarships from the federal government, state/local government, or the institution awarded to Group 2 students will be calculated for you.

02. Federal grants

This aid category is disaggregated into the following two subcategories: Pell grants and other federal grants.

Column 1. Report the number of Group 2 students who were awarded one or more grants from the federal government. This includes Pell grants and other federal grants. If a student appears in more than one type of aid category in Lines 02a or 02b, that student should only be counted once for Line 02. **Note that this number should be at least as large as the largest number reported in Line 02a, Column 1 or Line 02b, Column 1. In addition, this number cannot exceed the sum of [(Line 02a, Column 1) + (Line 02b, Column 1)].**

Column 2. The percentage of Group 2 students who were awarded one or more grants from the federal government will be calculated for you.

Column 3. The total dollar amount for Line 02 will be calculated for you. This value is calculated using the following formula: [(Line 02a, Column 3) + (Line 02b, Column 3)].

Column 4. The average amount of grants from the federal government awarded to Group 2 students will be calculated for you.

02a. Pell grants

Column 1. Report the number of Group 2 students who were awarded a Pell grant.

Column 2. The percentage of Group 2 students who were awarded a Pell grant will be calculated for you.

Column 3. Report the total dollar amount of all Pell grants awarded to Group 2 students.

Column 4. The average amount of Pell grants awarded to Group 2 students will be calculated for you.

02b. Other federal grants

Column 1. Report the number of Group 2 students who were awarded other federal grants. Other federal grants include Title IV grant aid **other than a Pell grant**.

Column 2. The percentage of students Group 2 students who were awarded other federal grants will be calculated for you.

Column 3. Report the total dollar amount of all other federal grants awarded to Group 2 students.

Column 4. The average amount of other federal grants awarded to Group 2 students will be calculated for you.

03. State/local government grants or scholarships (grants/scholarships/waivers)

Column 1. Report the number of Group 2 students who were awarded grant or scholarship aid from a state/local government. This includes grants, scholarships, or waivers funded by a state or local government. Do not include any other types of grants.

Column 2. The percentage of Group 2 students who were awarded grants or scholarships from a state/local government will be calculated for you.

Column 3. Report the total dollar amount of all grants or scholarships from a state/local government awarded to Group 2 students.

Column 4. The average amount of grants or scholarships from a state/local government awarded to Group 2 students will be calculated for you.

04. Institutional grants or scholarships (scholarships/fellowships)

Column 1. Report the number of Group 2 students who were awarded grant or scholarship aid from the institution. This includes grants, scholarships, or fellowships funded by the institution. Do not include any other types of grants.

Column 2. The percentage of Group 2 students who were awarded grants or scholarships from the institution will be calculated for you.

Column 3. Report the total dollar amount of all grants or scholarships from the institution awarded to Group 2 students.

Column 4. The average amount of grants or scholarships from the institution awarded to Group 2 students will be calculated for you.

05. Loans to students

This aid category is disaggregated into the following two subcategories: federal loans and other loans.

Column 1. Report the number of Group 2 students who were awarded one or more loans to students. This includes loans from the federal government and from other sources (including private lenders). If a student appears in more than one type of loan category in Lines 05a or 05b, that student should only be counted once for Line 05. **Note that this number should be at least as large as the largest number reported in Line 05a, Column 1 or Line 05b, Column 1. In addition, this number cannot exceed the sum of [(Line 05a, Column 1) + (Line 05b, Column 1)].**

Column 2. The percentage of Group 2 students who were awarded one or more loans to students will be calculated for you.

Column 3. The total dollar amount for Line 05 will be calculated for you. This value is calculated using the following formula: [(Line 05a, Column 3) + (Line 05b, Column 3)].

Column 4. The average amount of loans to students awarded to Group 2 students will be calculated for you.

05a. Federal loans

Column 1. Report the number of Group 2 students who were awarded one or more loans to students from the federal government. Do not include loans to others (e.g., PLUS loans to parents) and do not include any other type of grant or loan aid.

Column 2. The percentage of Group 2 students who were awarded one or more loans to students from the federal government will be calculated for you.

Column 3. Report the total dollar amount of all loans to students from the federal government awarded to Group 2 students.

Column 4. The average amount of loans to students from the federal government awarded to Group 2 students will be calculated for you.

05b. Other loans

Column 1. Report the number of Group 2 students who were awarded one or more loans to students from sources **other than the federal government**. This includes private loans to students. Do not include loans to others (e.g., loans to parents).

Column 2. The percentage of Group 2 students who were awarded one or more loans to students from sources other than the federal government will be calculated for you.

Column 3. Report the total dollar amount of all loans to students from sources other than the federal government awarded to Group 2 students.

Column 4. The average amount of loans to students from sources other than the federal government awarded to Group 2 students will be calculated for you.

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Cost of Attendance Revision

If you made errors in the prior year reporting of cost of attendance in the IC component, you can make changes in the SFA component. However, there are no prior year revisions for the SFA component. Please refer to the instructions on reporting cost of attendance in the IC component.

Part D - Enter Financial Aid About Group 3

This part is intended to collect information used to estimate the average net price for Group 3 students in Part F. Group 3 students are all full-time, first-time degree/certificate-seeking undergraduate students enrolled in your institution's largest program any time during the prior academic year paying the in-state or in-district tuition rate who were awarded grant or scholarship aid from the following sources: federal government, state/local government, or the institution. Students who were awarded only grant or scholarship aid from private or other sources, or students who were awarded only non-grant aid should not be included in this group.

For this part, report:

For These Students	The Following Type(s) of Aid	Awarded in this Period
• Full-time, first-time, degree/certificate-seeking undergraduate students enrolled in your institution's largest program paying the in-state or in-district tuition rate who were awarded grant or scholarship aid from the following sources: the federal government, state/local government, or the institution • Do not include students who were awarded only grant or scholarship aid from private or other sources, or students who were awarded only non-grant aid.	• Grant or scholarship aid from the federal government • Grant or scholarship aid from state/local government • Grant or scholarship from the institution • Do **not** include grant or scholarship aid from private or other sources.	• Any time during the prior academic year (the aid year period from July 1 through June 30)

Data carried forward from Part A include the following:

Information from Part A:	**YOUR PRIOR YEAR DATA** **2016-17**	**YOUR PRIOR YEAR DATA** **2017-18**	**2018-19**
Group 3 Full-time, first-time degree/certificate-seeking undergraduate students enrolled in your institution's largest program paying the in-state or in-district tuition rate who were awarded grant or scholarship aid from the federal government, state/local government, or the institution (This number is carried forward from Part A, Line 03)	Pre-loaded	Pre-loaded	Carried forward from Part A

In this part, you will be asked to report living arrangement information for Group 3 students. The living arrangement categories used in this component are the same categories used to describe living arrangements for Federal Student Aid purposes. Students indicate their intended living arrangement on the Free Application for Federal Student Aid (FAFSA).

Institutions should use the most recently available information regarding student living arrangement. For example, a student may have indicated on her or his FAFSA or an institutional financial aid application that she or he planned to live at home with family. But when the student enrolled, she or he decided to live on campus. Although the student may not have modified the FAFSA to reflect the updated living arrangement, the institution may have more recent information in its financial aid system indicating that the student lived on campus according to the most recent aid package for that student during the financial aid year. In this case, the institution should classify this student as an on-campus student.

A student should be counted in only one category—the one that the institution used most recently to develop or modify that student's financial aid package. If a student in this group did not complete the FAFSA, that student may appear as having an unknown living arrangement in Line 01d. However, if the institution knows the living arrangement for the student, then the student should be reported in the appropriate category.

Instructions:

In the fields provided, report the number of Group 3 students with each type of living arrangement and the total amount of grant or scholarship aid from the federal government, state/local government, or the institution awarded to these students.

Item **Description**

01. **Report the number of Group 3 students with the following living arrangements.**

- **01a.** **On-campus.** Report the number of Group 3 students who lived on-campus.
- **01b.** **Off-campus (with family).** Report the number of Group 3 students who lived off-campus with their parents or guardians.
- **01c.** **Off-campus (not with family).** Report the number of Group 3 students who lived off-campus not with their parents or guardians.
- **01d.** **Unknown (calculated).** This value is calculated using the following formula: [A03 – (D01a + D01b + D01c)], where A03 is the number of Group 3 students that you entered in Part A, Line 03. Note that this number should be a small percentage of the total number of students in a given year because institutions should have this information available for all students that completed the FAFSA as well as other information they have in their financial aid data systems.

02. **Report the total amount of grant or scholarship aid from the federal government, state/local government, or the institution awarded to Group 3 students**

Report the total dollar amount of grants and scholarship aid from the federal government, state/local government, or the institution awarded to Group 3 students. Exclude grant or scholarship aid from private sources (e.g., Rotary Club Scholarship) and exclude all loan aid.

03. **Average grant or scholarship aid from the federal government, state/local government, or the institution awarded to Group 3 students**

The average grant or scholarship aid from the federal government, state/local government, or the institution awarded to Group 3 students will be calculated for you. This value is calculated using the following formula: [D02/A03]. This amount will be used in Part F to calculate net price.

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Part E - Enter Financial Aid About Group 4

This part is intended to collect information used to estimate the average net price for Group 4 students in Part G. Group 4 students are full-time, first-time degree/certificate-seeking undergraduates enrolled in your institution's largest program any time during the prior academic year who were awarded any Title IV federal student aid (i.e., students who were awarded federal grant aid or who were awarded federal work study or federal student loans). For public institutions, Group 4 includes only those students who paid the in-state or in-district tuition rate.
Title IV federal student aid includes the following:

- Federal Pell Grant, Federal Supplemental Educational Opportunity Grant (FSEOG), Academic Competitiveness Grant (ACG), National Science and Mathematics Access to Retain Talent Grant (National SMART Grant), Teacher Education Assistance for College and Higher Education (TEACH) Grant
- Federal Work Study
- Federal Perkins Loan, Subsidized Direct or FFEL Stafford Loan, and Unsubsidized Direct or FFEL Stafford Loan

For this part, report:

For These Students	The Following Type(s) of Aid	Awarded in this Period
• Full-time, first-time, degree/certificate-seeking undergraduate students enrolled in your institution's largest program who were awarded any Title IV federal student aid · For public institutions, include only those students who paid the in -state or in-district tuition rate.	• Grant or scholarship aid from the federal government • Grant or scholarship aid from state/local government • Grant or scholarship aid from the institution • Do **not** include grant or scholarship aid from private or other sources. • Do **not** include loan amounts. • Do **not** include Federal Work Study amounts.	• Any time during the prior academic year (the aid year period from July 1 through June 30)

Data carried forward from Part A include the following:

Information from Part A:	**YOUR PRIOR YEAR DATA 2016-17** Pre-loaded	**YOUR PRIOR YEAR DATA 2017-18** Pre-loaded	**2018-19** Carried forward from Part A
Group 4 Full-time, first-time degree/certificate-seeking undergraduate students enrolled in your institution's largest program who were awarded any Title IV federal student aid. For public institutions, include only students paying the in-state or in-district tuition rate. (This number is carried forward from Part A, Line 04)			

Notes: In this part, you will be asked to report living arrangement information for Group 4 students. The living arrangement categories used in this component are the same categories used to describe living arrangements for Federal Student Aid purposes. Students indicate their intended living arrangement on the Free Application for Federal Student Aid (FAFSA).
Institutions should use the most recently available information regarding student living arrangements. For example, a student may have indicated on her or his FAFSA or an institutional financial aid application that she or he planned to live at home with family. But when the student enrolled she or he decided to live on campus. Although the student may not have modified the FAFSA to reflect the updated living arrangement, the institution may have more recent information in its financial aid system indicating that the student lived on campus according to the most recent aid package for that student during the financial aid year. In this case, the institution should classify this student as an on-campus student.
A student should be counted in only one category—the one that the institution used most recently to develop or modify that student's financial aid package. If a student in this group did not complete the FAFSA, that student may appear as having an unknown living arrangement in Line 01d. However, if the institution knows the living arrangement for the student, then the student should be reported in the appropriate category.
In this part, you will also be asked to report the number of students in Group 4 and the total amount of grant or scholarship aid they were awarded by income level. To determine the income level of the student, use the income that was used by the institution's financial aid office to determine the student's Expected Family Contribution (EFC). For dependent students this will include the parents' adjusted gross income and the student's adjusted gross income. For independent students this will include the student's adjusted gross income.
Instructions:
In the fields provided, report the number of Group 4 students with each type of living arrangement.

Item	Description
01.	**Report the number of Group 4 students with the following living arrangements.**
01a.	**On-campus.** Report the number of Group 4 students who lived on-campus.
01b.	**Off-campus (with family).** Report the number of Group 4 students who lived off-campus with their parents or guardians.
01c.	**Off-campus (not with family).** Report the number of Group 4 students who lived off-campus not with their parents or guardians.
01d.	

Unknown (calculated). This value is calculated using the following formula: [A04 – (E01a + E01b + E01c)], where A04 is the number of Group 4 students that you entered in Part A, Line 04. Note that this number should be a small percentage of the total number of students in a given year because institutions should have this information available for all students that completed the FAFSA as well as other information they have in their financial aid data systems.

In the fields provided, report the number of Group 4 students who were awarded any Title IV aid (column 1); the number of Group 4 students who were awarded any grant or scholarship aid from the federal government, state/local government, or the institution (column 2); and the total amount of grant or scholarship aid from the federal government, state/local government, or the institution awarded to these students by income level (column 3).

Item			Description
02.	**02a.**	**$0–30,000**	**Column 1.** Report the number of Group 4 students in this income level who were awarded any Title IV aid. **Column 2.** Report the number of Group 4 students in this income level who were awarded any grant or scholarship aid from the federal government, state/local government, or the institution. **Column 3.** Report the total amount of grant or scholarship aid awarded to Group 4 students in this income level from the following sources: federal government, state/local government, or the institution. **Column 4.** The average dollar amount of grant or scholarship aid awarded to Group 4 students in this income level from the federal government, state/local government, or the institution will be calculated for you.
	02b.	**$30,001–48,000**	**Column 1.** Report the number of Group 4 students in this income level who were awarded any Title IV aid. **Column 2.** Report the number of Group 4 students in this income level who were awarded any grant or scholarship aid from the federal government, state/local government, or the institution. **Column 3.** Report the total amount of grant or scholarship aid awarded to Group 4 students in this income level from the following sources: federal government, state/local government, or the institution. **Column 4.** The average dollar amount of grant or scholarship aid awarded to Group 4 students in this income level from the federal government, state/local government, or the institution will be calculated for you.
	02c.	**$48,001–75,000**	**Column 1.** Report the number of Group 4 students in this income level who were awarded any Title IV aid. **Column 2.** Report the number of Group 4 students in this income level who were awarded any grant or scholarship aid from the federal government, state/local government, or the institution. **Column 3.** Report the total amount of grant or scholarship aid awarded to Group 4 students in this income level from the following sources: federal government, state/local government, or the institution. **Column 4.** The average dollar amount of grant or scholarship aid awarded to Group 4 students in this income level from the federal government, state/local government, or the institution will be calculated for you.
	02d.	**$75,001–110,000**	**Column 1.** Report the number of Group 4 students in this income level who were awarded any Title IV aid. **Column 2.** Report the number of Group 4 students in this income level who were awarded any grant or scholarship aid from the federal government, state/local government, or the institution. **Column 3.** Report the total amount of grant or scholarship aid awarded to Group 4 students in this income level from the following sources: federal government, state/local government, or the institution. **Column 4.** The average dollar amount of grant or scholarship aid awarded to Group 4 students in this income level from the federal government, state/local government, or the institution will be calculated for you.
	02e.	**$110,001 and more**	**Column 1.** Report the number of Group 4 students in this income level who were awarded any Title IV aid. **Column 2.** Report the number of Group 4 students in this income level who were awarded any grant or scholarship aid from the federal government, state/local government, or the institution. **Column 3.** Report the total amount of grant or scholarship aid awarded to Group 4 students in this income level from the following sources: federal government, state/local government, or the institution. **Column 4.** The average dollar amount of grant or scholarship aid awarded to Group 4 students in this income level from the federal government, state/local government, or the institution will be calculated for you.
	02f.	**Total all income levels**	**Column 1.** The total number of Group 4 students who were awarded any Title IV aid will be calculated for you. **Column 2.** The total number of Group 4 students who were awarded any grant or scholarship aid from the federal government, state/local government, or the institution will be calculated for you. **Column 3.** The total amount of grant or scholarship aid awarded to Group 4 students from the federal government, state/local government, or the institution will be calculated for you.

Column 4. The average dollar amount of grant or scholarship aid awarded to Group 4 students from the federal government, state/local government, or the institution will be calculated for you.

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Part F - Net Price Calculation for Group 3

This part is intended to summarize the information used to estimate the average net price for Group 3 students. Group 3 students are all full-time, first-time degree/certificate-seeking undergraduate students enrolled in your institution's largest program any time during the prior academic year who were awarded grant or scholarship aid from the following sources: the federal government, state/local government, or the institution. For public institutions, Group 3 includes only those students who paid the in-state or in-district tuition rate.

As required by the HEA, as amended (2008), the average net price for Group 3 students will be posted on College Navigator. In addition, the average net price calculated for this group will be used in the U.S. Department of Education's College Affordability and Transparency lists.

The components used to estimate the average net price include the average total cost of attendance for the institution's largest program and the average grant or scholarship aid awarded to Group 3 students. The total cost of attendance is the sum of published tuition and required fees (Line 01), books and supplies (Line 02) and the weighted average by living arrangement for room and board and other expenses (Line 05). Information about cost of attendance is carried forward from data that your institution reported in the Institutional Characteristics component of IPEDS. If you did not enter this information and have questions about the values entered here, contact your institution's IPEDS Keyholder.

The source or calculation for each line is described here.

Item **Description**

01. Published tuition and required fees (lower of in-state or in-district at public institutions)

The published tuition and required fees (lower of in-state or in-district at public institutions) are carried forward from data that your institution reported on the IPEDS Institutional Characteristics component, Part D - Student Charges, Cost of Attendance.

02. Books and supplies

The cost for books and supplies are carried forward from data that your institution reported on the IPEDS Institutional Characteristics component, Part D - Student Charges, Cost of Attendance.

03. Room and board and other expenses by living arrangement

The cost for room and board and other expenses by living arrangement are carried forward from data that your institution reported on the IPEDS Institutional Characteristics component, Part D - Student Charges, Cost of Attendance.

04. Number of Group 3 students by living arrangement

These numbers are carried forward from Part D, Lines 01a through 01d.

05. Weighted average by living arrangement (excluding unknown values) for room and board and other expenses

This value is generated by determining the average room and board and other expenses (Lines 03a through 03c) weighted by student living arrangement (excluding students in the unknown category). This value is calculated using the following formula:
Line 05 = [(Line 03a*(Line 04a/(Line 04a+Line 04b+Line 04c))] + [Line 03b*(Line 04b/(Line 04a+Line 04b+Line 04c))] + [Line 03c*(Line 04c/(Line 04a+Line 04b+Line 04c))]

06. Total cost of attendance

This value is calculated using the following formula: Line 01 + Line 02 + Line 05.

07. Average grant or scholarship aid from the federal government, state/local government, or the institution awarded to Group 3 students

This value is carried forward from Part D, Line 04.

08. Average institutional net price for Group 3 students

The average institutional net price for full-time, first-time degree/certificate-seeking undergraduate students enrolled in your institution's largest program any time during the prior academic year who were awarded grant or scholarship aid from the federal government, state/local government, or the institution is calculated for you. This value is calculated using the following formula: Line 06 – Line 07. The average net price for Group 3 students will be posted on College Navigator and used in the U.S. Department of Education's College Affordability and Transparency lists.

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Part G - Net Price Calculation for Group 4

This part is intended to summarize the information used to estimate the average net price for Group 4 students. Group 4 students are all full-time, first-time degree/certificate-seeking undergraduate students enrolled in your institution's largest program any time during the prior academic year who were awarded Title IV federal student aid. For public institutions, Group 4 includes only those students who paid the in-state or in-district tuition rate. As required by the HEA, as amended (2008), the average net price for Group 4 students will be posted on College Navigator.

The components used to estimate the average net price include the average total cost of attendance for the institution's largest program and the average grant or scholarship aid awarded to Group 4 students. The total cost of attendance is the sum of published tuition and required fees (Line 01), books and supplies (Line 02) and the weighted average by living arrangement for room and board and other expenses (Line 05). Information about cost of attendance is carried forward from data that your institution reported in the Institutional Characteristics component of IPEDS. If you did not enter this information and have questions about the values entered here, contact your institution's IPEDS Keyholder.

The source or calculation for each line is described here.

Item **Description**

01. Published tuition and required fees (lower of in-state or in-district at public institutions)

The published tuition and required fees (lower of in-state or in-district at public institutions) are carried forward from data that your institution reported on the IPEDS Institutional Characteristics component, Part D - Student Charges, Cost of Attendance.

02. Books and supplies

The cost for books and supplies are carried forward from data that your institution reported on the IPEDS Institutional Characteristics component, Part D - Student Charges, Cost of Attendance.

03. Room and board and other expenses by living arrangement

The cost for room and board and other expenses by living arrangement are carried forward from data that your institution reported on the IPEDS Institutional Characteristics component, Part D - Student Charges, Cost of Attendance.

04. Number of Group 4 students by living arrangement

These numbers are carried forward from Part E, Lines 01a through 01d.

05. Weighted average by living arrangement (excluding unknown values) for room and board and other expenses

This value is generated by determining the average room and board and other expenses (Lines 03a through 03c) weighted by student living arrangement (excluding students in the unknown category). This value is calculated using the following formula: Line 05 = [Line 03a*(Line 04a/(Line 04a+Line 04b+Line 04c))]+[Line 03b*(Line 04b/(Line 04a+Line 04b+Line 04c))]+[Line 03c*(Line 04c/(Line 04a+Line 04b+Line 04c))]

06. Total cost of attendance

This value is calculated using the following formula: Line 01 + Line 02 + Line 05.

07. Average grant or scholarship aid from the federal government, state/local government, or the institution awarded to Group 4 students

These values are carried forward from Part E, Line 04, Column 4 for each income level.

08. Average institutional net price for Group 4 students

The average institutional net price for full-time, first-time degree/certificate-seeking undergraduate students enrolled in your institution's largest program any time during the prior academic year who were awarded Title IV federal student aid is calculated for you. These values are calculated for each income level using the following formula: Line 06 – Line 07. The average net price for Group 4 students by income level will be posted on College Navigator.

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Section 2. Military Servicemembers and Veteran Students with Benefits

Purpose of Component

The purpose of the Student Financial Aid (SFA) component is to collect information about the financial aid provided to various groups of undergraduates in order to meet requirements of the *Higher Education Act of 1965*, as amended. Starting in the 2014-15 data collection year, SFA has expanded to collect information on the federal dollars supporting military servicemember and veteran undergraduate and graduate students.
As presented in the *Technical Review Panel Report #36* (March 2012), the increase in beneficiaries and federal dollars has led to an increased demand for information to help prospective students decide where to use their educational benefits, researchers to study the impact of the programs on college outcomes, and policymakers to assess the effectiveness of benefits programs and return on investment.

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Who Must Report

All registered IPEDS institutions that educate military servicemembers, veterans, or eligible dependents receiving any Tuition Assistance Program or Post-9/11 GI Bill benefits. Report only those that **RECEIVED** the benefit(s).

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Changes in reporting

The following changes were implemented for the 2019-20 data collection period:

- There is a new instruction to exclude students participating in Experimental Pell

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General Instructions

What You Will Need

If you are unfamiliar with these educational benefits, a general synopsis of each program is found below.
1. Post-9/11 GI Bill

- Effective August 1, 2009, benefit provides payment of tuition and fees, monthly housing allowance, and books and supplies stipend.
- Tuition and fees are paid directly to the institution on behalf the students; thus, institutions should know which students have Post-9/11 GI Bill benefits and the amount of benefits received at the institution.
- Educational benefits can be transferred to a dependent.
- Program expanded in 2011 to cover non-degree-granting programs, apprenticeships/on-the-job training programs, flight training programs, and training correspondence.
- The Yellow Ribbon program through the Post-9/11 GI Bill is an institutional aid matching program only for tuition and fees for students attending participating institutions.
- For more information, visit the Department of Veteran Affairs, Post-9/11 GI Bill Benefits website http://www.benefits.va.gov/gibill/post911_gibill.asp

2. Department of Defense Tuition Assistance

- For active duty servicemembers, reservists called to active duty, and their spouses.
- Educational payments cover only tuition and fees and are made directly to the institution.
- GI Bill benefits can be used to supplement costs not covered by this program.
- For more information, visit the Department of Defense Tuition Assistance Program website http://www.dodmou.com/

Consult and verify the data with your institutional representative who certifies these benefits. This individual or office may not be in the student financial aid office.

About the Data

The Post-9/11 GI Bill and Tuition Assistance programs may only highlight two of many educational benefits provided to military servicemembers and veterans. However, from a national perspective, Post-9/11 GI Bill and Tuition Assistance programs are more likely to be found across over 7,500 IPEDS institutions.

For Yellow Ribbon participating institutions, the institutional aid provided through the Post-9/11 GI Bill Yellow Ribbon matching program should NOT be included in the Post-9/11 GI Bill's Total dollar amount of benefits/assistance awarded through the institution.

Context Boxes

Optional context boxes throughout the component allow institutions to provide more information regarding reported data. Note that the information in these context boxes may be posted on the U.S. Department of Education's College Navigator website. NCES will review entries in these context boxes for applicability and appropriateness before posting them on College Navigator. However, institutions should ensure that entries in these context boxes are free from grammatical and spelling errors and are written so they can be understood by students and parents.

Interactive Edits

This component contains interactive edits that will check for blank fields, invalid values, or values that fall outside expected ranges. Some error messages will require you to confirm or explain the values that you entered. Some error messages are fatal and will require you to contact the IPEDS Help Desk at (877) 225-2568 or ipedshelp@rti.org for resolution.

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Coverage

Reporting Period

The data reported for the Post-9/11 GI Bill benefit questions should be for the prior academic year, from July 1 to June 30. For example, for the 2019-20 data collection year, the data reported will be July 1, 2018-June 30, 2019.
The data reported for the Department of Defense Tuition Assistance Program questions should be for the prior academic year, from October 1 to September 30. For example, for the 2019-20 data collection year, the data reported will be October 1, 2018-September 30, 2019.

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Detailed Instruction

This section provides line-by-line instructions for the Military Servicemember and Veteran Benefits questions.
For the Post-9/11 GI Bill benefit, please provide in the first column the number of students receiving the benefit during the July 1-June 30 reporting period (see coverage above). In the second column, provide the total dollar amount for each benefit during the same reporting period.
For the Department of Defense Tuition Assistance Program benefit, please provide in the first column the number of students receiving the benefit during the October 1-September 30 reporting period (see coverage above). In the second column, provide the total dollar amount for each benefit during the same reporting period.
If your institution did not have any student beneficiaries for one of the benefit programs, enter a zero (0) in the cell. In other words, do NOT leave the cell blank for a program that did not have any beneficiaries.
For Yellow Ribbon participating institutions, the institutional aid provided through the Post-9/11 GI Bill Yellow Ribbon matching program should NOT be included in the Post-9/11 GI Bill's Total dollar amount of benefits/assistance awarded through the institution.

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Glossary

date: 8/21/2019

Term	Definition
Cohort year	The year that a cohort of students begins attending college.
Cost of attendance	The amount of tuition and fees, room and board, books and supplies, and other expenses that a full-time, first-time degree/certificate-seeking student can expect to pay to go to college for an academic year. Costs reported by the institutions are those amounts used by the financial aid office to determine a student's financial need.
Federal grants (grants/educational assistance funds)	Grants provided by federal agencies such as the U.S. Department of Education, including Title IV Pell Grants and Supplemental Educational Opportunity Grants (SEOG). Also includes need-based and merit-based educational assistance funds and training vouchers provided from other federal agencies and/or federally sponsored educational benefits programs. (Used for reporting on the Student Financial Aid component)
Financial aid	Federal Work Study, grants, loans to students (government and/or private), assistantships, scholarships, fellowships, tuition waivers, tuition discounts, employer aid (tuition reimbursement) and other monies (other than from relatives/friends) provided to students to meet expenses. This excludes loans to parents.
First-time student (undergraduate)	A student who has no prior postsecondary experience (except as noted below) attending any institution for the first time at the undergraduate level. This includes students enrolled in academic or occupational programs. It also includes students enrolled in the fall term who attended college for the first time in the prior summer term, and students who entered with advanced standing (college credits or recognized postsecondary credential earned before graduation from high school).
Full-time student	Undergraduate: A student enrolled for 12 or more semester credits, or 12 or more quarter credits, or 24 or more clock hours a week each term. Graduate: A student enrolled for 9 or more semester credits, or 9 or more quarter credits, or a student involved in thesis or dissertation preparation that is considered full-time by the institution. Doctor's degree - Professional practice - as defined by the institution.
Institutional grants	Scholarships and fellowships granted and funded by the institution and/or individual departments within the institution, (i.e., instruction, research, public service) that may contribute indirectly to the enhancement of these programs . Includes scholarships targeted to certain individuals (e.g., based on state of residence, major field of study, athletic team participation) for which the institution designates the recipient.
Integrated Postsecondary Education Data System (IPEDS)	The Integrated Postsecondary Education Data System (IPEDS), conducted by the NCES, began in 1986 and involves annual institution-level data collections. All postsecondary institutions that have a Program Participation Agreement with the Office of Postsecondary Education (OPE), U.S. Department of Education (throughout IPEDS referred to as "Title IV") are required to report data using a web-based data collection system. IPEDS currently consists of the following components: Institutional Characteristics (IC); 12-month Enrollment (E12);Completions (C); Admissions (ADM); Student Financial Aid (SFA); Human Resources (HR) composed of Employees by Assigned Position, Fall Staff, and Salaries; Fall Enrollment (EF); Graduation Rates (GR); Outcome Measures (OM); Finance (F); and Academic Libraries (AL).
Loans to students	Any monies that must be repaid to the lending institution for which the student is the designated borrower. Includes all Title IV subsidized and unsubsidized loans and all institutionally and privately sponsored loans. Does not include PLUS and other loans made directly to parents.
Military Tuition Assistance Program (TAP)	A program that funds up to 100% of an eligible servicemember's college tuition and course-specific fees. Available only to eligible servicemembers who are currently in active service as long as criteria limits are not exceeded and students are enrolled off-duty in an U.S. Department of Education accredited post-secondary institution. This military benefit is paid directly to the postsecondary institution by the individual's Armed service.
Net price	The *Higher Education Act, as amended (2008),* defines institutional net price as "the average yearly price actually charged to first-time, full-time undergraduate students receiving student aid at an institution of higher education after deducting such aid." In IPEDS, average institutional net price is generated by subtracting the average amount of federal, state/local government, or institutional grant and scholarship aid from the total cost of attendance. Total cost of attendance is the sum of published tuition and required fees (lower of in-district or in-state for public institutions), books and supplies, and the weighted average for room and board and other expenses. Cost of attendance data are collected in the Institutional Characteristics (IC) component of IPEDS, and financial aid data are collected in the Student Financial Aid (SFA) component of IPEDS.
Off-campus (not with family)	A living arrangement in which a student does not live with the student's parents or legal guardians in any housing facility that is not owned or controlled by the educational institution.
Off-campus (with family)	A living arrangement in which a student lives with the student's parents or legal guardians in any housing facility that is not owned or controlled by the educational institution.
On-campus housing	Any residence hall or housing facility owned or controlled by an institution within the same reasonably contiguous geographic area and used by the institution in direct support of or in a manner related to, the institution's educational purposes.
Post 9/11 GI Bill	A federal education benefit program for veterans, who served on active duty after September 10, 2001. This Department of Veteran Affairs benefit provides up to 36 months of education benefits at an approved institution for the following college costs: tuition and fees, books and supplies, and housing. The tuition and fees payment, which is the cost for an in-state student attending a public institution, is made directly to the postsecondary institution whereas payments for books and supplies and housing are sent directly to the student.
Scholarships	Grants-in-aid, trainee stipends, tuition and required fee waivers, prizes or other monetary awards given to undergraduate students.
State and local grants	Grant monies provided by the state such as Leveraging Educational Assistance Partnerships (LEAP) (formerly SSIG's); merit scholarships provided by the state; and tuition and fee waivers for which the institution was reimbursed by a state agency. Local government grants include scholarships or gift-aid awarded directly to the student. (Used for reporting Finance data for private for-profit institutions)
Title IV institution	An institution that has a written agreement with the Secretary of Education that allows the institution to participate in any of the Title IV federal student financial assistance programs (other than the State Student Incentive Grant (SSIG) and the National Early Intervention Scholarship and Partnership (NEISP) programs).
Transfer of Entitlement Option	

	A program through which any unused Post 9/11 GI Bill may be transferred to a spouse or dependent(s) as long as servicemembers or veterans meet the additional Department of Veterans Affairs criteria. Only Department of Defense (DoD) can approve transfer of benefits requests.
Yellow Ribbon Program	A voluntary program through which participating public and private institutions can provide veterans and eligible beneficiaries additional institutional aid to cover the costs of tuition and fees at their institutions. The Yellow Ribbon Program is a supplementary program to the Post 9/11 GI Bill coverage of in-state tuition and fees. The Department of Veterans Affairs matches the institutional aid provided beyond the in-state tuition and fees, but up to a certain limit each year.

Student Financial Aid

Click one of the following questions to view the answer.

General

1) Which institutions are required to complete the IPEDS Student Financial Aid (SFA) component?
2) What is the reporting period covered by SFA for the 2019-20 collection year?
3) What changes occurred for SFA for the 2019-20 collection year?
4) Can I revise my institutions cost of attendance (COA) data in SFA?
5) Should my institution, which is participating as an experimental site, report high school students or incarcerated students who have received a Pell Grant while taking college coursework?

Student Counts

1) For which students should I report financial aid information?
2) What students are included in Group 1?
3) What students are included in Group 2?
4) What students are included in Group 2a?
5) What students are included in Group 2b?
6) What students are included in Group 3?
7) What students are included in Group 4?

Financial Aid

1) Should veterans education benefits be reported?
2) How should I report post-9/11 "Yellow Ribbon" benefits?
3) The SFA survey indicates that the maximum amount of DOD TAP awarded per fiscal year per student is $4500. What do I do if my DOD TAP average is greater than $4500 per student?
4) What types of financial aid should be reported?
5) What is the time period for which I should report financial aid amounts?
6) Should tuition and fee waivers be reported?
7) Where in Part C should I report tribal aid?
8) Should PLUS loans be reported?
9) What does "aid awarded" mean?
10) If a student is awarded more than one type of aid, do I count him/her twice?
11) Where can I get living arrangement information for students?
12) How do I get information about students' income categories?
13) The institution awards grants funded by an affiliated foundation. How should these grants be reported?

Answers:

General

1) Which institutions are required to complete the IPEDS Student Financial Aid (SFA) component?

All postsecondary institutions that either 1.) participate in federal student financial aid programs that enrolled undergraduate students or 2.) enroll students who received an educational benefit (e.g., Department of Defense Tuition Assistance or Department of Veteran Affairs Post-9/11GI Bill) any time during academic year 2018-19 must complete SFA.

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2) What is the reporting period covered by SFA for the 2019-20 collection year?

For the 2019-20 data collection, institutions should report data for academic year 2018-19.

For Title IV participating institutions that enroll undergraduate students:

- For **academic reporters**, the academic year is defined as the period of time generally extending from September to June; usually equated to 2 semesters or trimesters, 3 quarters, or the period covered by a 4-1-4 calendar system.

  To determine the financial aid amounts to report for a given group of students, first identify the students in that group (e.g., for Group 2, full-time, first-time degree/certificate-seeking undergraduates enrolled in Fall 2018). Second, determine the financial aid that was awarded to these students any time during the 2018-19 academic year.
- For **program reporters**, the academic year is defined by the institution, so long as the institutionally defined academic year falls within the full aid year period of July 1-June 30.

  To determine the financial aid amounts to report for a given group of students, first identify the students in that group (e.g., for Group 2, full-time, first-time degree/certificate-seeking undergraduates enrolled any time during the academic year). Second, determine the financial aid that was awarded to these students any time during the academic year.

For institutions that enroll undergraduate and graduate students who received military or veteran benefits:

- The data reported for the **Post-9/11 GI Bill** benefit questions should be for the prior academic year, from July 1 to June 30.
- The data reported for the **Department of Defense Tuition Assistance Program** questions should be for the prior academic year, from October 1 to September 30.

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3) What changes occurred for SFA for the 2019-20 collection year?

For the 2019-20 collection year, there were no changes.

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4) Can I revise my institutions cost of attendance (COA) data in SFA?

Yes, the 3 most recent COA years can be changed in SFA's "Cost Revision" screen, which carried forward the COA data from Institutional Characteristics (IC) component. Changes should only be made if errors were made in the IC reporting. Changes cannot be made in the prior year revision system.

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5) Should my institution, which is participating as an experimental site, report high school students or incarcerated students who have received a Pell Grant while taking college coursework?

If your institution is participating in the Dual Enrollment experimental site or the Second Chance Pell experimental site program, exclude these students from reporting.

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Student Counts

1) For which students should I report financial aid information?

SFA collects information on undergraduate students only.

Academic reporters should report on students who were enrolled as of October 15, or the institution's official Fall reporting date.

Program reporters should report on students who were enrolled any time during the academic year. For program reporters, the academic year is defined by the institution, so long as it falls between July 1 and June 30.

For the purposes of reporting to SFA, students are divided into the following groups:

- **Group 1:** All undergraduate students
- **Group 2:** Of Group 1, full-time, first-time degree/certificate-seeking students
- **Group 3:** Of Group 2, students who were awarded any grant/scholarship aid from the federal government, state/local government, or the institution. For public institutions, include only those paying in-state/in-district tuition rates. For program reporters, include only those enrolled in the institution's largest program.
- **Group 4:** Of Group 2, students who were awarded any Title IV federal student aid. For public institutions, include only those paying in-state/in-district tuition rates. For program reporters, include only those enrolled in the institution's largest program.

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2) What students are included in Group 1?

Group 1 includes all undergraduate students. You should report the total number of all new and continuing full-time students, part-time students, degree/certificate-seeking students, and non-degree/certificate-seeking students.

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3) What students are included in Group 2?

Group 2 students include all full-time, first-time degree/certificate-seeking undergraduates.

For **academic reporters**, include students attending your institution for the first time at the undergraduate level. Also include students enrolled in the fall term who attended college for the first time in the prior summer term, and students who entered with advanced standing (college credits earned before graduation from high school). This number should match the data that you reported on the Fall Enrollment component of IPEDS.

For **program reporters**, include students attending your institution for the first time at the undergraduate level anytime during the academic year, as defined at your institution. Also include students who entered with advanced standing (college credits earned before graduation from high school). This number should closely match the data you reported on the 12-month Enrollment component of IPEDS.

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4) What students are included in Group 2a?

In Group 2a, you should report the number of full-time, first-time degree/certificate-seeking undergraduate students who were awarded any of the following:

- Federal Work Study
- Federal or private loans to students
- Grant or scholarship aid from the federal government
- Grant or scholarship aid from state/local government

- Grant or scholarship aid from the institution
- Grant or scholarship aid from other sources known to the institution

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5) What students are included in Group 2b?

In Group 2b, you should report the number of full-time, first-time degree/certificate-seeking undergraduate students who were awarded any of the following:

- Federal or private loans to students
- Grant or scholarship aid from the federal government
- Grant or scholarship aid from state/local government
- Grant or scholarship aid from the institution

Group 2b is Group 2a minus those students who were awarded only Federal Work Study or grant or scholarship aid from other sources known to the institution.

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6) What students are included in Group 3?

Group 3 students include all full-time, first-time degree/certificate-seeking undergraduates who were awarded grant or scholarship aid from the following sources:

- Federal government
- State/local government
- Institution

For public institutions, include only those students who paid the in-state or in-district tuition rate. For program reporters, include only those students enrolled in the institution's largest program.

Do not include students who were awarded only grant or scholarship aid from private or other sources, or students who were awarded only non-grant aid, such as loans.

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7) What students are included in Group 4?

Group 4 students include all full-time, first-time degree/certificate-seeking undergraduates who were awarded any Title IV aid.

Title IV aid includes the following:

- Federal Pell Grant, Federal Supplemental Educational Opportunity Grant (FSEOG), Academic Competitiveness Grant (ACG), National Science and Mathematics Access to Retain Talent Grant (National SMART Grant), Teacher Education Assistance for College and Higher Education (TEACH) Grant
- Federal Work Study
- Federal Perkins Loan, Subsidized Direct or FFEL Stafford Loan, and Unsubsidized Direct or FFEL Stafford Loan

For public institutions, include only those students who paid the in-state or in-district tuition rate. For program reporters, include only those students enrolled in the institution's largest program.

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Financial Aid

1) Should veterans education benefits be reported?

For the portion of SFA (Parts A through E) that requires Title IV institutions to report on undergraduate students receiving financial aid:

- Veterans education benefits **should not** be reported as financial aid in SFA.
- The Higher Education Opportunity Act of 2008 (HEOA) removed veterans education benefits from "estimated financial assistance," effective July 1, 2010. A later technical corrections bill (H.R. 1777) updated the list of programs that meet the definition of "veterans' education benefits" in section 480(c) of the Higher Education Act (HEA) and moved the effective date of the exclusion to July 1, 2009 (beginning with the 2009-10 award year).
- However, the institutional aid from Yellow Ribbon program should be reported under institutional aid. See how to report the Yellow Ribbon aid in FAQ.
- For more information about the Department's Guidance on Federal Veterans' Education Benefits for Purposes of the Title IV Student Assistance Programs, please visit https://ifap.ed.gov/eannouncements/081309GuidFedVeteransEdBenefits.html.

For the portion of SFA (Section 2) that requires institutions to report on students who received military or veteran benefits:

- Educational benefits from the Department of Defense's Military Tuition Assistance or Department of Veteran Affairs' Post-9/11 GI Bill **should** be reported in SFA.

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2) How should I report post-9/11 "Yellow Ribbon" benefits?

The Post-9/11 GI Bill program includes a 'Yellow Ribbon' program, which is comprised of matching funds provided by the government and the institution. The institutional part of this aid should be reported in the SFA component (Section 1) as aid to the undergraduate student. Yellow Ribbon benefits provided from the VA should NOT be included when reporting to the portion of SFA (Section 1) on Title IV institutions that enroll full-time, first-time degree/certificate seeking undergraduate students.

However, both Post-9/11 GI Bill and Yellow Ribbon beneficiaries and federal dollar amounts should be reported to the military/veteran question of SFA (Section 2). This portion of SFA requires all institutions that enroll students with Post-9/11 GI Bill and/or Tuition Assistance educational benefits to provide the number of beneficiaries and total dollar amounts.

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3) The SFA survey indicates that the maximum amount of DOD TAP awarded per fiscal year per student is $4500. What do I do if my DOD TAP average is greater than $4500 per student?

According to the 2014 final regulations set for the DOD Voluntary Education Programs - which include TAP - each branch of military service can pay no more than $250/semester-unit (or equivalent) for tuition. Each service member is eligible for up to $4500 in aggregate for each fiscal year. If your institution's DOD TAP average is greater than $4500 per student per award year, then you should:
--Ask your financial aid office or VA certifying official to sort out the military aid and remove any non-DOD TAP aid (e.g., ROTC scholarships, tuition reimbursements for advanced civil schooling, education-related incentive or bonus);
--Remove any non-Title 10 aid since TAP is a Title 10 program; and
--Make sure that you are including one disbursement period for that award year. Even though DOD TAP aid are reported for the Oct 1 – Sep 30 timeframe, which technically covers two fall periods; only include one fall disbursement period per award year.

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4) What types of financial aid should be reported?

The following types of financial aid should be reported in this component:

- **Federal grants (grants/educational assistance funds):** Grants provided by federal agencies such as the U.S. Department of Education, including Title IV federal student aid grants such as Pell grants, Federal Supplemental Educational Opportunity Grants (FSEOGs), Academic Competitiveness Grants (ACGs), National Science and Mathematics Access to Retain Talent (National SMART) Grants, and Teacher Education Assistance for College and Higher Education (TEACH) Grants. Also include need-based and merit-based educational assistance funds and training vouchers provided from other federal agencies and/or federally-sponsored educational benefits programs.
- **State/local government grants (grants/scholarships/waivers):** Grants that were provided by your state such as Leveraging Educational Assistance Partnerships (LEAP) (formerly SSIGs) and Robert C. Byrd Honors Scholarships. Also include merit scholarships that were provided by your state and tuition and fee waivers for which your institution was reimbursed by a state agency. Local grants include any local government grants, scholarships or gift-aid awarded directly to the student.
- **Institutional grants:** Scholarships and fellowships granted and funded by the institution and/or individual departments within the institution (and are limited to students attending your institution). Also include scholarships targeted to certain individuals (e.g., based on state of residence or major) for which the institution designates the recipient; athletic scholarships; and the like. This is not intended to include Federal Work Study.
- **Private grants or scholarships:** These may include scholarships or grants to students that are paid by an outside organization but are directed through the institution's financial aid office (e.g., Rotary Club Scholarship).
- **Loans to students:** Monies that must be repaid to the lending institution for which the student is the designated borrower. Include all Title IV federal student loan aid such as Federal Perkins Loans, Subsidized Direct or FFEL Stafford Loans, and Unsubsidized Direct or FFEL Stafford Loans. Also include all institutionally- and privately-sponsored loans. Please do not include PLUS and other loans made directly to parents.

Note that different parts of the SFA component ask for different types of financial aid to be reported. Please review the instructions and the survey screens carefully to ensure that you are reporting the correct types of financial aid in the appropriate parts.

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5) What is the time period for which I should report financial aid amounts?

Institutions should report aid that was awarded any time during the academic year.

For academic reporters, the academic year is the period of time generally extending from September to June, usually equated to two semesters or trimesters, three quarters, or the period covered by a 4-1-4 calendar system.

For program reporters, the academic year is defined by the institution, so long as it falls between July 1 and June 30.

Note that for the purposes of calculating net price, the cost of attendance (COA) for an academic year reported in the Institutional Characteristics (IC) component should align with the aid amounts reported in the Student Financial Aid (SFA) component.

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6) Should tuition and fee waivers be reported?

Yes, tuition and fee waivers should be reported.

Tuition and fee waivers for which your institution was reimbursed by a state agency should be reported under state/local government grants.

Tuition and fee waivers granted by your institution (for which your institution is not reimbursed from another source) should be reported as institutional grants.

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7) Where in Part C should I report tribal aid?

In general, institutions should report financial aid from tribal offices awarded to full-time, first-time students in the state/local government field (Line 03) in Part C.

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8) Should PLUS loans be reported?

No. PLUS loans are made to the parents of students. Any type of loan that is not made to the student should not be reported.

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9) What does "aid awarded" mean?

Institutions should report on grant or scholarship aid that has been awarded to students. This may be different from aid that was actually disbursed to students. For example, a student may be awarded grant or scholarship aid at the beginning of the academic year but then leave the institution before the entire amount is disbursed. In this case, you would report the original amount of grant or scholarship aid that was awarded, even though the entire amount was not actually disbursed to the student.

For reporting loans to students, institutions should continue to report on loans that were awarded to and accepted by the student.

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10) If a student is awarded more than one type of aid, do I count him/her twice?

Yes, students should be included in each category of aid that they are awarded. If a student is awarded both federal and institutional aid, he/she should be counted under both types of aid.

However, in Part C, count students only once in the major aid category. For example, if a student is awarded both a Pell Grant (Line 02a) and another type of federal grant (Line 02b), then count that student once for the major category of Federal grants (Line 02).

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11) Where can I get living arrangement information for students?

Students indicate their intended living arrangement on the Free Application for Federal Student Aid (FAFSA) or an institutional financial aid application. If a student did not complete the FAFSA or an institutional financial aid application with living arrangement information, that student may appear as having an unknown living arrangement.

Institutions should use the most recently available information regarding student living arrangement.

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12) How do I get information about students' income categories?

To assign the income category of the student, use the income that was used by your financial aid office to determine the student's Expected Family Contribution (EFC). For dependent students this will include the parents' adjusted gross income and the student's adjusted gross income. For independent students this will include the student's adjusted gross income.

If your institution takes part in campus-based aid programs like the Federal Supplemental Educational Opportunity Grants, Federal Work Study, and Perkins Loans, then it might be easiest to tell your financial aid office that students should be put in income categories as they are done on FISAP(Fiscal Operations Report and Application to Participate). Institutions with campus-based aid programs must report annually to the Department of Education using the FISAP. Part of the FISAP includes income-related information. Even if your institution does not file FISAP, the instructions from it may be helpful (fields 26-39):

- Use the FISAP Total Income (FTI), one of the intermediate computed values on the Student Aid Record (SAR) or ISIR (Institutional Student Information Record), to determine the proper cell for each student. For dependent students, FTI is the sum of Total Income (TI) and Student's Total Income (STI). For independent students, the FTI will equal the TI. Remember, extract this information only from the SARs/ISIRs of students who actually enrolled in your school.
- You might need to correct or adjust a student's income information and recalculate the EFC. If so, you must use that corrected or adjusted information when determining the proper income cell for a student. In such a case, to determine the income cell for a dependent student, you must use the student's and parents' base year incomes, as reported on the SAR/ISIR.

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13) The institution awards grants funded by an affiliated foundation. How should these grants be reported?

If the foundation's mission is to benefit the institution, then: (1) those portions of the foundation-funded grants where the institution designates the recipient should be reported as institutional grants; and (2) those portions of the foundation-funded grants where the foundation designates the recipient should be reported as private grants. All grants funded by foundations with missions other than to benefit the institution should be reported as private grants.

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