

2023-24 Survey Materials > Package

Student Financial Aid for institutions with graduate students only

Overview

IPEDS Student Financial Aid Survey Component Overview

Welcome to the Student Financial Aid (SFA) Survey component. As a graduate school, the purpose of the SFA component is to collect information about your students who have received military assistance and certain veteran educational benefits.

Data Reporting Reminders:

- Report data to accurately reflect the time period corresponding with the IPEDS survey component, even if such reporting is seemingly inconsistent with prior-year reporting.
- If there are no students in a benefit category, please enter zero (0). Do **NOT** leave the cell blank.

Interactive Edits and Error Messages:

SFA contains interactive edits to 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 entered. Some error messages are fatal and will require you to contact the IPEDS Help Desk at (877) 225-2568 for resolution.

Changes to reporting:

The following changes were implemented for the 2023-24 data collection period:

- Reiterated instructions on what is reported in each part for specific students and reporting periods.

Resources:

- To download the survey materials for this component: [Survey Materials](#)


If you have questions about completing this survey, please contact the IPEDS Help Desk at 1-877-225-2568.

Section 2: Screening Question

Section 2: Military Servicemembers and Veteran's Benefits - Screening Question

1. Did your institution disburse military tuition assistance and/or veteran's benefits?

- No
- Yes

 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. Therefore, you should write all context notes using proper grammar (e.g., complete sentences with punctuation) and common language that can be easily understood by students and parents (e.g., spell out acronyms).

Non-applicable 

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

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

Important Note:

- Report for **Post-9/11 GI Bill Benefits**: July 1, 2022 - June 30, 2023.
- Report for **Department of Defense Tuition Assistance Program**: October 1, 2022 - September 30, 2023

Reporting Reminders:

- Report program student counts and disbursed amounts known to the institution for the Veteran's Affairs and Department of Defense programs listed.
- Report unduplicated student counts within a category (e.g., Post 9/11 GI Bill Benefits), however, a student can appear in both categories (i.e., a student can be counted as a Post 9/11 GI Bill Benefits recipient and a Department of Defense Tuition Assistance recipient).
- 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.
- Do not leave a cell blank. Enter zero (0) if your institution did not have beneficiaries for the financial assistance program or program level.

Type of benefit/assistance	YOUR CURRENT YEAR DATA			YOUR PRIOR YEAR DATA
	2022-23			2021-22
	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
	(1)	(2)	(3)	
Graduate students				
<u>Post-9/11 GI Bill Benefits</u>	<input type="text"/>	<input type="text"/>		
<u>Department of Defense Tuition Assistance Program</u>	<input type="text"/>	<input type="text"/>		
Total				

Prepared by

Prepared by

Reporting Reminders:

- 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:		
<input type="radio"/> Keyholder	<input type="radio"/> SFA Contact	<input type="radio"/> HR Contact
<input type="radio"/> Finance Contact	<input type="radio"/> Academic Library Contact	<input type="radio"/> Other
Name:	<input type="text"/>	
Email:	<input type="text"/>	

How many staff from your institution only were involved in the data collection and reporting process of this survey component?
<input type="text"/> 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? <i>Exclude the hours spent collecting data for state and other reporting purposes.</i>				
Staff member	Collecting Data Needed	Revising Data to Match IPEDS Requirements	Entering Data	Revising and Locking Data
Your office	<input type="text"/> hours	<input type="text"/> hours	<input type="text"/> hours	<input type="text"/> hours
Other offices	<input type="text"/> hours	<input type="text"/> hours	<input type="text"/> hours	<input type="text"/> hours

Summary

Student Financial Aid Component Summary

The purpose of this summary is to provide you an opportunity to view some of the data that, when accepted through the IPEDS quality control process, will appear on the [College Navigator](#) website and/or your institution's Data Feedback Report (DFR). In addition, all data reported in IPEDS survey components become publicly available through the [IPEDS Use the Data](#) and appear as aggregated statistics in various Department of Education reports. [College Navigator](#) is updated approximately three months after the data collection period closes and DFRs will be available through the [IPEDS Use the Data](#) and sent to your institution's CEO at the end of 2024.

Please review your data for accuracy. If you have questions about the data displayed below or after reviewing the data reported on the survey screens, please contact the IPEDS Help Desk at: 1-877-225-2568 or ipedshelp@rti.org.

GENERAL INFORMATION	
Reporter Type	
Calendar System	
Award Levels Offered	
Levels of Enrollment Offered	
System	

Military Service Members and Veteran's Benefits		
Type of benefit/assistance	Number of students receiving benefits/assistance	Total dollar amount of benefits/assistance disbursed through the institution
<u>Post-9/11 GI Bill Benefits</u>		
	Undergraduate students	
	Graduate students	
	Total	
<u>Department of Defense Tuition Assistance Program</u>		
	Undergraduate students	
	Graduate students	
	Total	

Purpose of Component

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Purpose of Survey Component

To meet the requirements of Executive Order No. 13607, Establishing Principles of Excellence for Educational Institutions Serving Service Members, Veterans, Spouses, and Other Family Members and the Improving Transparency of Education Opportunities for Veterans Act, the U.S. Department of Education, Department of Defense, and Department of Veteran's Administration collaborated with the education community to develop consumer information and outcome measures to help military students and their families make informed decisions about attending postsecondary schools. Beginning with the 2014-15 data collection year, SFA expanded to collect information on the federal dollars supporting military servicemember and veteran undergraduate and graduate students.

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).

Changes in reporting

The following changes were implemented for the 2023-24 data collection period:

- Reiterated instructions on what is reported in each part for specific students and reporting periods.

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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.

- 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 of 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 <https://www.va.gov/education/about-gi-bill-benefits/post-9-11/>
- Department of Defense (DOD) Tuition Assistance Program
 - 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/> and see 38 USC § 36 (2020).

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 the information in these context boxes may be posted on the U.S. Department of Education's College Navigator website. Context box entries are reviewed by NCES for applicability and appropriateness before posting them on College Navigator. However, institutions should ensure entries are free from grammatical and spelling errors and are written so that they can be understood by students and parents.

Interactive Edits

This component contains interactive edits to 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 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 2022-23 data collection year, the data reported will be July 1, 2022-June 30, 2023.

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 2022-23 data collection year, the data reported will be October 1, 2022-September 30, 2023.

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 Use the Data portal](#)
- [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](#)
- Projections of Education Statistics

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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 no student(s) received benefits at your institution 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

Term	Definition
Cohort year	The year that a cohort of students begins attending college.
Cost of attendance (for IPEDS reporting purposes)	The amount of tuition and fees; food and housing; books, course materials, supplies, and equipment; 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 to IPEDS by the institution are those amounts used by the financial aid office to determine a student's financial need for the academic year, which is typically nine months.
Cross-over award period	A term or period of enrollment in a course or program that begins in one award year and ends in the subsequent award year.
Federal Work Study (FWS)	A part-time work program awarding on- or off-campus jobs to students who demonstrate financial need. FWS positions are primarily funded by the federal government (federal share), but are also partially funded by other organizations, including the institution (non-federal share). FWS is awarded to eligible students by the college as part of the student's financial aid package. The maximum FWS award is based on the student's financial need, the number of hours the student is able to work, and the amount of FWS funding available at the institution. This is a type of Title IV Aid, but it is not considered grant or loan aid to students.
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) .
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.
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.
Title IV aid	Title IV aid to students includes grant aid, work study aid, and loan aid. Current and historical programs include: 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 (formerly the National Direct Student loan or NDSL program) , Subsidized and Unsubsidized Federal Family Education Loan (FFEL) also known as the Stafford Loan (formerly the Guaranteed Student Loan or GSL program), and Subsidized and Unsubsidized William D. Ford Direct Loan.
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.

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- 5) [Should my institution, which is participating as a U.S. Department of Education experimental site, include experimental site participants in IPEDS Student Financial Aid \(SFA\) Survey student counts and financial aid amounts?](#)
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Financial Aid

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- 9) [What does "aid awarded" mean?](#)
- 10) [If a student is awarded more than one type of aid, do I count him/her twice?](#)
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- 13) [The institution awards grants funded by an affiliated foundation. How should these grants be reported?](#)
- 14) [Should Federal Pell Grant and campus-based aid administrative cost allowance \(ACA\) amounts be included in financial aid award amounts reported to IPEDS?](#)
- 15) [Should Iraq and Afghanistan Service Grant, or IASG funded under the Children of Fallen Heroes Scholarship Act be reported to IPEDS?](#)
- 16) [How do I report student counts and loan amounts for borrowers enrolled in post-baccalaureate teacher certification or licensure programs or courses required by a state to obtain certification to teach on the elementary or secondary level in the state who are treated as undergraduate students for the purpose of borrowing Federal Direct Loans?](#)

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 2022-23 must complete SFA.

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- 2) What is the reporting period covered by SFA for the 2023-24 collection year?

For the 2023-24 data collection, institutions should report award or disbursement data for students enrolled during academic year 2022-23.

Important Note: If the financial aid student counts do not match student counts reported in another IPEDS survey component, please work with the data reporter for the survey component at your institution to determine why the numbers are different. Contact the IPEDS Help Desk if you need assistance revising or correcting data.

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 2023-24 collection year?

The following changes were implemented for the 2023-24 data collection period:

- Removed the 'Groups terminology'
- Renumbered lines on screens and in instructions
- Reiterated instructions on what is reported in each part for specific students and reporting periods
- Rephrased "room and board" terminology in survey materials to "food and housing," including Glossary terms
- Added FAQ regarding inclusion of incarcerated students
- Revised FAQ regarding experimental site participants

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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 a U.S. Department of Education experimental site, include experimental site participants in IPEDS Student Financial Aid (SFA) Survey student counts and financial aid amounts?

No, exclude experimental site participants from reporting.

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- 6) Should incarcerated students be reported to IPEDS in SFA?

Yes. Include all incarcerated students when determining students counts and financial aid amounts reported to IPEDS.

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Student Counts

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

Section 1: Student Financial Aid (SFA) currently collects information on undergraduate students only. NCES is planning to add collection for graduate student aid in future collections.

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

Program reporters should report on students 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.

Financial aid information is collected about the following student categories:

- All undergraduate students
- Full-time, first-time degree/certificate-seeking undergraduate students (FTFT)
- FTFT undergraduate students who paid the lower of in-state/in-district tuition rate and were awarded any grant/scholarship aid from the federal government, state/local government, or the institution
- FTFT undergraduate students who paid the lower of in-state/in-district tuition rate and were awarded any Title IV federal student aid

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Financial Aid

- 1) Should veterans education benefits be reported?

For Section 1 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/electronic-announcements/08-13-2009-general-subject-guidance-federal-veterans-education-benefits>.

For 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 Department of Defense (DOD) Tuition Assistance (TA) program awarded per fiscal year per student is \$4500. What do I do if my DOD TA average is greater than \$4500 per student?

According to the 2014 final regulations set for the [DOD Voluntary Education Programs](#) - which include TA - 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 TA 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 TA 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:

- **Title IV aid:** Title IV aid includes Federal Pell Grant, Federal Supplemental Educational Opportunity Grant (FSEOG), Teacher Education Assistance for College and Higher Education (TEACH) Grant, Federal Work Study (FWS), and the Subsidized and Unsubsidized Direct Loan programs. Report 100% of student FSEOG and FWS award amounts. That is, include the federal and matching share, regardless of the source of the match. Also, FSEOG and FWS award amounts should not exceed program amounts budgeted for the award year. That is, if the institution's packaging policy includes an over-awarding strategy to account for attrition to make sure all funds are expended, exclude these amounts from award amounts reported to IPEDS.
- **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) 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 (a) other federal agencies and/or (b) 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 Federal Student Aid's purposes. For more information, visit <https://ifap.ed.gov/electronic-announcements/08-13-2009-general-subject-guidance-federal-veterans-education-benefits>.

- **Federal Work Study:** Money earned by students based on financial need to meet postsecondary education costs who are employed part-time, typically in education related employment or community service activities on- campus or off-campus at the institution, or a private for-profit or nonprofit business, agency, or organization. Earnings include the federal and nonfederal share of wages, benefits, withholdings, and other employment deductions. It includes credit and non-credit employment. Examples of types of employment include, but is not limited to, assistantships, apprenticeships, internships, externships, and cooperative education experiences. While it does not include institutional and state work study programs, the non-federal share includes all state and local funds used to match these programs. See applicable federal, state, local, and institutional program rules for additional information.
- **Federal loans to students:** Money borrowed 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 programs such as Subsidized Direct Loans, and Unsubsidized Direct Loans. It also includes Health Professions Student Loans, Loans for Disadvantaged Students, Nursing Student Loans, and Primary Care 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 provided by your state such as Leveraging Educational Assistance Partnerships (LEAP) (formerly SSIGs), the Special Leveraging Educational Assistance Program (SLEAP), the Grants for Access and Persistence (GAP) Program, 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 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 or major) for which the institution designates the recipient; athletic scholarships; and the like. This is not intended to include Federal Work Study.
- **Institutional loans to students:** Short-term and long-term education loans to students made by the institution or its Schools, Colleges, or student organizations, including emergency education loans backed by a surety (i.e., financial guarantee). Exclude loans not made directly to the student, loans contingent on the student's financial aid (also known as payment deferrals) not backed by another source of security, and Income share agreements.
- **Private grants or scholarships:** Grants or scholarships to students awarded and paid by an outside organization but directed through the institution's financial aid office and/or business 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. Do not include loans contingent on the student's financial aid (also known as payment deferrals) not backed by another source of security.

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 Federal 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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14) Should Federal Pell Grant and campus-based aid administrative cost allowance (ACA) amounts be included in financial aid award amounts reported to IPEDS?

Do not report Federal Pell Grant or Title IV Campus-Based Aid Administrative Cost Allowance amounts to IPEDS. These amounts are reported as revenues on the Finance Survey. However, report campus-based aid funds (e.g., Federal Supplemental Education Opportunity Grant or FSEOG, and Federal Work Study, or FWS) administrative cost allowance amounts **used to make grants awards to students or pay FWS employment earnings** to IPEDS.

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15) Should Iraq and Afghanistan Service Grant, or IASG funded under the Children of Fallen Heroes Scholarship Act be reported to IPEDS?

Yes, IASG **should** be reported to IPEDS as federal grants, not scholarships. Even though the grants are awarded, in part, based on Federal Pell Grant methodology, the U.S. Department of Education does not consider these amounts to be Federal Pell Grants. As such, IASG awards should be **excluded** from Federal Pell Grant student counts and award amounts reported to IPEDS.

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- 16) How do I report student counts and loan amounts for borrowers enrolled in post-baccalaureate teacher certification or licensure programs or courses required by a state to obtain certification to teach on the elementary or secondary level in the state who are treated as undergraduate students for the purpose of borrowing Federal Direct Loans?

Report these students to IPEDS as undergraduate students for the purpose of borrowing a Federal Direct Loan, which minimizes reporting burden since it is consistent with COD and FISAP reporting requirements.

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