Commission for Higher Education Data Submission System

Financial Aid File

Instructions and Definitions

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Overview

The financial aid file provides information about financial aid (grants, loans, and work study) provided to students to help subsidize their education. For reporting aid, institutions should report on actual aid that was disbursed.

The financial aid file must be submitted in October-November of the year following the academic year/trailing summer year being reported on. For a campus submission for a given reporting year, a financial aid record is uniquely identified by the Student Identifier and Disbursement Period fields. A given student identifier and disbursement period cannot appear in multiple rows. A student profile record MUST exist for each record submitted.

Whom to report: Report data only for students who were disbursed financial aid during the academic year or trailing summer. Do not report data on non-credit students (students who were enrolled **exclusively** in courses not creditable toward a certificate/degree; in Continuing Education Units (CEUs); or exclusively auditing classes).

Field ID	Field Position #	Data Element	Use	Allowable Values
FA01	1	Reporting Year	To identify the reporting year	Four digit numeric year (e.g., 2016). Must be valid year
FA02	2	Location	To associate a student with a location for data reporting	Location code found in table 1.1 of the General Instructions document
FA03	3	Student Identifier	As key field to link with other data reports	Alphanumeric value of no more than 10 characters
FA04	4	Disbursement Period	To identify the period in which aid was disbursed (academic year vs. trailing summer).	Numeric value 0-1 0 = Academic year 1 = Trailing summer
FA05	5	Dependency Status	For report disaggregation	Numeric value 0-2 0 = Unknown 1 = Independent 2 = Dependent
FA06	6	Housing Status	For report disaggregation	Numeric value 0-4 0 = Undeclared 1 = On-campus 2 = Off-campus (not with family) 3 = Overseas 4 = Off-campus (with family)
FA07	7	Pell Grant Disbursement Amount	To identify total Pell amount disbursed and for report disaggregation	Numeric value from 0 to 99999 0 = no grant disbursed
FA08	8	Student Residency Status	For report disaggregation (reports by resident/non-resident)	Numeric code 1-2,4 1 = Indiana resident paying resident tuition 2 = non-resident for tuition/fee purposes 4 = non-resident paying in-state or reduced fees through reciprocity agreement
FA09	9	Total Federal Subsidized Loan Amount (repayment required)	To identify total loan amount disbursed for calculating cost to degree and reporting on affordability	Numeric value from 0 to 99999 0 = no loan disbursed
FA10	10	Total Federal Unsubsidized Loan Amount (repayment required)	To identify total loan amount disbursed for calculating cost to degree and reporting on affordability	Numeric value from 0 to 99999 0 = no loan disbursed
FA11	11	Total Institutional Loan Amount (repayment required)	To identify total loan amount disbursed for calculating cost to degree and reporting on affordability	Numeric value from 0 to 99999 0 = no loan disbursed
FA12	12	Total Other Loan Amount (repayment required)	To identify total loan amount disbursed for calculating cost to degree and reporting on affordability	Numeric value from 0 to 99999 0 = no loan disbursed
FA13	13	Total Federal Loan to Parent (repayment required)	To identify total federal loan amount disbursed for calculating cost to degree and reporting on affordability	Numeric value from 0 to 99999 0 = no loan disbursed

Field ID	Field Position #	Data Element	Use	Allowable Values
FA14	14	Total Federal Grant Amount (no repayment required)	To identify total grant amount disbursed for calculating cost to degree and reporting on affordability	Numeric value from 0 to 99999 0 = no grant disbursed Value must be greater than or equal to the sum of the Pell Grant (FA07) and Federal Veteran Grant (FA27) fields.
FA15	15	Total State Grant Amount (no repayment required)	To identify total grant amount disbursed for calculating cost to degree and reporting on affordability	Numeric value from 0 to 99999 0 = no grant disbursed
FA16	16	Total Institutional Grant Amount (no repayment required)	To identify total grant amount disbursed for calculating cost to degree and reporting on affordability	Numeric value from 0 to 99999 0 = no grant disbursed
FA17	17	Total Other Grant Amount (no repayment required)	To identify total grant amount disbursed for calculating cost to degree and reporting on affordability	Numeric value from 0 to 99999 0 = no grant disbursed
FA18	18	Total Federal Work Study Amount	To identify work study aid amount for calculating cost to degree and reporting on affordability	Numeric value from 0 to 99999 0 = no funds disbursed
FA19	19	Total State Work Study Amount	To identify work study aid amount for calculating cost to degree and reporting on affordability	Numeric value from 0 to 99999 0 = no funds disbursed
FA20	20	21st Century Scholar Grant Disbursement	To identify the 21st Century Scholar grant amount disbursed to the student for 21st Century Scholar data reporting and disaggregation	Numeric value from 0 to 99999 0 = no grant disbursed Value must be less than or equal to the value reported in Total State Grant Amount (FA15)
FA21	21	Gross Income Level	To identify total income level associated with a student in calculating cost to degree and affordability	Numeric value from 0 to any value (no maximum) 0 = no income Blank = unknown
FA22	22	Base (tuition)	To identify base cost for student/parent for calculating cost to degree and reporting on affordability	Numeric value from 0 to any value (no maximum)
FA23	23	Required fees (excluding room and board)	To identify additional costs for student/parent for calculating cost to degree and reporting on affordability	Numeric value from 0 to any value (no maximum) 0 = no required fees
FA24	24	Total Cost of Attendance	To identify total cost for the student when calculating cost to degree and reporting on affordability.	Numeric value from 0 to any value (no maximum) Blank = unknown
FA25	25	Total Parent Contribution	To identify total parent contribution to calculate cost to degree and affordability	Numeric value from 0 to any value (no maximum) 0 = no parent contribution Blank = unknown
FA26	26	Total Student Contribution	To identify total student contribution for dependent and independent students to calculate cost to degree and affordability	Numeric value from 0 to any value (no maximum) 0 = no student contribution Blank = unknown
FA27	27	Total Federal Veteran Grant Amount (no repayment required)	For research purposes	Numeric value from 0 to 99999 0 = no grant disbursed
FA28	28	Frank O'Bannon (FOB) Grant Disbursement	To identify the FOB grant amount disbursed to the student for FOB data reporting and disaggregation	Numeric value from 0 to 99999 0 = no grant disbursed Value must be less than or equal to the value reported in Total State Grant Amount (FA15)

Definitions

Reporting Year: The year for which data are being reported. Report trailing year (e.g., 2017-2018 is reported as 2018).

Location: Where the student takes the majority of coursework throughout the disbursement period. Allowable codes are found in Table 1.1 of the General Instructions.

Student Identifier: Institution-assigned unique student ID that is consistent across all data submissions for the reporting year.

Disbursement Period: The period (academic year or trailing summer) for which financial aid data are being reported. If a student was disbursed financial aid in both academic year (fall and/or spring) and trailing summer, the student should have two records.

Dependency Status: Student's classification as dependent or independent with regards to eligibility for Title IV Federal Student aid.

Housing Status: Typically, student's residence arrangement as defined in the Free Application for Federal Student Aid (FAFSA). Use the more accurate of these two options: what is reported on the FAFSA, or more reliable student-specific information from another source (e.g., on-campus housing charges assessed by the university).

Pell Grant Disbursement Amount: Report the total amount of Pell grant funds disbursed to the student.

Student Residency Status: Student's residency or non-residency in Indiana, as recorded by the institution. Resident students are Indiana residents paying resident fees; non-resident students are paying non-resident fees. Students who are non-residents but are paying resident fees through reciprocity agreements should be reported as reciprocity students (code 4), not resident students.

Total Federal Subsidized Loan Amount (repayment required): Report the total amount of federal subsidized loan aid disbursed to the student. These are subsidized loans provided by the federal government for which the student is the designated borrower.

Total Federal Unsubsidized Loan Amount (repayment required): Report the total amount of federal unsubsidized loan aid disbursed to the student. These are unsubsidized loans provided by the federal government for which the student is the designated borrower.

Total Institutional Loan Amount (repayment required): Report the total amount of institutional loan aid disbursed to the student. These are loans provided by the institution for which the student is the designated borrower.

Total Other Loan Amount (repayment required): Report the total amount of other loan aid disbursed to the student. These are loans not covered in the federal, state, or institutional loan categories, such as private loans (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.

Total Federal Loan Amount to Parent (repayment required): Report the total amount of federal loan aid disbursed to the student's parent(s). Report disbursement amounts only for federal loans to parents that are administered through the campus, such as the Parent Loan for Undergraduate Students (PLUS).

Total Federal Grant Amount (no repayment required): Report the amount of federal grant money disbursed to the student. These are federal grants that do not require repayment by the student or the student's family. This field includes grants paid 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 (SMART), and Teacher Education Assistance for College and Higher Education (TEACH) Grants. **Do not** include Veterans' Education Benefits as defined in section 480(c) of the HEA.

Total State Grant Amount (no repayment required): Report the total amount of state grant money disbursed to the student. These are merit-based grants and scholarships that were disbursed by the state of Indiana. Include grants administered by CHE such as the Frank O'Bannon grant program, 21st Century Scholars grant program, Adult Student Grant Program, Next Generation Hoosier Educators Scholarship, William A. Crawford Minority Teacher Scholarship, Mitch Daniels Early Graduation Scholarship, Indiana National Guard Supplemental Grant, and the Child of Certain Veterans and Public Safety Officers Supplemental Grant Program. Also include tuition and fee waivers (e.g., CVO) and book costs for which your institution was reimbursed by a state agency.

Total Institutional Grant Amount (no repayment required): Report the total amount of institutional grant money disbursed to the student. These are 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 institution 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.

Total Other Grant Amount (no repayment required): Report the total amount of other grant money disbursed to the student. These are grants not covered in the federal, state, or institutional loan categories, such as grants or scholarships that are disbursed and paid by an outside organization but are directed through the institution's financial aid office (e.g., Rotary Club Scholarship).

Total Federal Work Study Amount: Report the total amount of job compensation to students who receive subsidies under the Federal College Work Study program. This should include all gross wages paid, including the employer's share and the work study program share.

Total State Work Study Amount: Report the total amount of job compensation to students who receive subsidies under the Indiana College Work Study program (EARN Indiana). This should include all gross wages paid, including the employer's share and the work study program share.

21st Century Scholar Grant Disbursement Amount: Report the total amount of 21st Century Scholar grant funds disbursed to the student.

Gross Income Level: Report the combined taxable (AGI) and non-taxable income received by the parent (if student is a dependent) or student (if student is not a dependent).

Base (tuition): Report the base tuition amount charged to the student for the reporting period.

Required fees (excluding room and board): Report the required fees, over and above the tuition amount, but excluding room and board, charged to the student for the reporting period.

Total Cost of Attendance: The estimate of the total costs of attending the institution for the reporting period, as assigned to each student by the campus financial aid office. Included in the estimate are the following categories of expenses: tuition, mandatory fees, room and board, books and supplies, personal expenses, and transportation.

Total Parent Contribution: Report the parent contribution for dependent students for the reporting period.

Total Student Contribution: Report the student contribution of both dependent and self-supporting students for the reporting period.

Total Federal Veteran Grant Amount: Report the total amount of federal veteran benefit grant funds disbursed to the student (e.g., Post 911 GI bill)

Frank O'Bannon (FOB) Grant Disbursement Amount: Report the total amount of FOB grant funds disbursed to the student.

Document Change History	
2018	No changes
	Start of 17-18 Collection
2017	Added Frank O'Bannon Grant Field (FA28); clarification of state grant program definition
	Start of 16-17 Collection
2016	Added Total Federal Veteran Grant Field (FA27)
	Start of 15-16 Collection
2015	No changes
	Start of 14-15 Collection
2014	No changes
	Start of 13-14 Collection
2013	No changes
	Start of 12-13 Collection
2012	SIS data collection split into four collections
	Start of 11-12 Collection