

Types of Student Financial Aid Reported to the Integrated Postsecondary Education Data System Student Financial Aid Survey Tutorial Script 2024-25 Data Collection

On behalf of the Institute of Education Science's, IES, National Center for Education Statistics, NCES, and the Association for Institutional Research, AIR, welcome to this tutorial on the Integrated Postsecondary Education Data System, or IPEDS, Student Financial Aid Survey, also called SFA. The purpose of this tutorial is to describe the categories and types of financial aid reported on the SFA Survey. After completing this tutorial, you will be able to:

1. Distinguish federal financial aid resources from state, local, institutional, and private resources; and
2. List the types of aid from the entities above collected on the IPEDS SFA Survey.

Students may receive financial aid from a variety of sources, including federal agencies, state governments, local governments, institutions, and private organizations. The financial aid award year typically begins on July 1 and ends on June 30 for most programs. For other programs, such as the Department of Defense's Tuition Assistance program, the award year begins October 1 and ends September 30. Since the award year may vary by program and/or funding source, be sure to read the SFA Survey instructions carefully to make sure the student counts and award amounts reported are for the correct period.

In general, the types of financial aid reported on the SFA Survey fall into ten broad categories. They are:

- | | |
|--|--|
| 1. Title IV aid; | 6. Institutional loans; |
| 2. Federal grants and scholarships; | 7. Private grants and scholarships; |
| 3. Federal loans; | 8. Private loans; |
| 4. State and local government grants, scholarships, and waivers; | 9. Post 9/11 GI Bill and Department of Defense Tuition Assistance funds; and |
| 5. Institutional grants, scholarships, and waivers; | 10. Other sources known to the institution. |

Financial aid types are defined as follows for IPEDS reporting purposes:

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.

Federal grants and scholarships (including educational assistance funds): Grants and scholarships provided by federal agencies such as the U.S. Department of Education and Department of Health and Human Services (HHS), including Title IV federal student aid program grants such as Federal Pell Grants, FSEOG, TEACH Grants.

Also include need-based and merit-based educational assistance funds and training vouchers provided from (a) other federal agencies and (b) federally-sponsored educational benefits programs. Do not include any veterans' education benefits or Department of Defense Tuition Assistance funds in Section 1 of the SFA Survey.

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 credit or non-credit employment (a) at the institution; (b) in community service activities on- campus or off-campus; or (c) at 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. Federal Work Study may 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. Do not include Department of Veteran's Affairs (VA) work study.

Federal loans to students: Money borrowed from the federal government that must be repaid for which the student is the designated borrower. It includes all Title IV federal student loan aid such as, Subsidized and Unsubsidized Direct Loans. It also includes Health Professions Student Loans, Loans for Disadvantaged Students, Nursing Student Loans, Primary Care Loans, and other federal education loans. Do not include PLUS loans and other federal loans not made directly to the student.

State/local government grants and/or scholarships (includes fellowships, waivers, and employee exemptions): Grants, scholarships, fellowships, and waivers awarded by a state or local government including but not limited to the Leveraging Educational Assistance Partnerships (LEAP) Program (formerly SSIG) and the Grants for Access and Persistence (GAP) Program. Include (a) state and local matching shares for federal financial aid programs; (b) merit-based grants or scholarships provided by a state or local government; and (c) tuition and fee waivers and employee exemptions for which your institution was reimbursed by a state or local government agency.

Institutional grants and/or scholarships (include fellowships, waivers, and employee exemptions): Grants, scholarships, fellowships, and waivers granted and funded by the institution and/or individual departments within the institution for students attending the institution. Also include scholarships for which the institution designates the recipient. Include institutional tuition and fee waivers, and employee exemptions for which the institution is not reimbursed by a state or local government agency. Exclude FWS earnings but include the non-work-study of portion of scholarships, fellowships, and waivers used to satisfy matching requirements for other programs.

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 deferments) not backed by another source of security, and income share agreements.

Private grants and/or scholarships: Grants or scholarships to students awarded and paid by an outside organization but are directed through the institution's financial aid office and/or business office (e.g., Rotary Club Scholarships). These are known as pass-through funds.

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 such as Income Share

Agreements. Do not include loans for which the student is not the primary borrower. Do not include loans contingent on the student's financial aid (also known as payment deferments) not backed by another source of security.

Department of Defense Tuition Assistance Program and Post 9/11 GI Bill amounts received know to the institution by military service members, veterans, and their dependents enrolled at the institution are reported for undergraduates and graduates in Section 2 of the SFA Survey. These types of aid are defined as follows for IPEDS reporting purposes:

Post 9/11 GI Bill Benefits: A federal education benefit for veterans, who served on active duty after September 10, 2001, administered by the Department of Veteran's Affairs that provides up to 36 months of education benefits at an approved institution for 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. Do not include Yellow Ribbon Program institutional match.

Department of Defense Military Tuition Assistance: A federal program available to eligible servicemembers to pay up to 100% of college tuition and course-specific fees directly to the institution for off-duty enrollment in an U.S. Department of Education accredited postsecondary institution.

Other Sources Known to the Institution: This includes other types of aid not listed in any of the aid types defined above and not excluded in the IPEDS instructions. Contact the IPEDS Help Desk if you have questions about financial assistance programs not listed on the IPEDS SFA Survey Form or in the instructions.

Institutions report different types of student financial aid for undergraduate and graduate students on the SFA Survey. Please read the instructions carefully to identify the enrollment period, types of aid, and aid award period reported for each student category. A video tutorial about SFA Survey student categories is available on the AIR website.

Here are a few important reminders when reporting aid types and student counts on the IPEDS SFA Survey.

1. Report grant and scholarship aid awarded to students, rather than the amount of aid disbursed. For example, a student awarded grant aid at the beginning of the academic year may leave the institution before the entire amount awarded is disbursed. In this case, the institution should report the original amount of grant aid awarded, even though the entire amount was not actually disbursed to the student.
2. Iraq and Afghanistan Service Grants or IASGs are federal grants, but the U.S. Department of Education does not consider these amounts to be Federal Pell Grants. Report IASG awards in federal grant student counts and award amounts but exclude them from Federal Pell Grant counts and amounts reported to IPEDS.
3. Do not report Federal Work Study (FWS) earnings as a separate amount to IPEDS. However, be sure to include FWS recipients in Title IV aid student counts and award amounts.
4. When reporting loans to students, institutions should report loans awarded to and accepted by the student.

This concludes the tutorial on SFA Survey financial aid categories and financial aid types. Now, you should feel comfortable distinguishing and discussing different financial aid categories and the types of aid within each category for IPEDS reporting purposes.

Answers to frequently asked questions are listed with the SFA survey materials available on the IPEDS Report Your Data page. If you have questions about reporting data to IPEDS or the IPEDS Data Collection System, contact the IPEDS Data Collection Help Desk at (877) 225-2568 or send an email to Help Desk staff at ipedshelp@rti.org. For assistance using IPEDS data tools, contact the IPEDS Data Use Help Desk at (866) 558-0658 or ipedstools@rti.org.