

Integrated Postsecondary Education Data System (IPEDS) 2024-25 through 2026-27

Student Financial Aid (SFA)

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Submitted by:

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Student Financial Aid Package 2024-25 through 2026-27 Data Collections

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Changes for 2024-25

The following changes were implemented for the 2024-25 data collection period:

The proposed changes to the Student Financial Aid (SFA) survey component for the 2024-25 data collection eliminates the multiple forms that were historically presented on the survey materials page; however, there remain differences in how institutions report. Those differences are indicated in gold text on the single remaining form as presented to OMB (note, institutions will not see the gold text but will see the screens that are applicable to them). To accomplish this, we propose to move the cost of attendance and average net price data items to a new IPEDS Cost (CST) survey component; add a screening question for Section 2 where Department of Veterans Affairs Post-9/11 and Department of Defense Tuition Assistance benefit data are collected; and make other modifications and edits to improve transparency, consistency, and accuracy of the data collected. The proposed changes are based, in part, on cumulative changes in the Higher Education Act of 1965, as amended; U.S. Department of Education guidance and clarifications; and changes in industry practices since 2008. They are also based on National Education Postsecondary Cooperative (NPEC) research papers, Technical Review Panel (TRP) recommendations and feedback; IPEDS Help Desk feedback and suggestions; and NCES' internal testing and quality control processes spanning the same time period.

Other notable changes include the clarification and distinction of federal, state and local pass through funds from institutional and private funds for IPEDS reporting purposes; clarification on when and where to report private education loans; and documentation of an existing practice to clarify Fall Enrollment (EF) student counts are carried forward to the SFA Survey for academic reporters whereas 12-Month Enrollment (E12) student counts are carried forward to the SFA Survey for program reporters.

We also structured and reorganized the new SFA Survey Form to include data items applicable to all institutions from all five previous form versions. Please review the attached survey form for survey screen, instructions, and FAQ changes.

General	
Student Financial Aid Survey Form and Instructions	
Survey Form	Cost of attendance and net price elements have been moved to the new IPEDS Cost survey component (CST).
Section 1, Part A, Line 7	Clarified that loans to students reported for this question includes private education loans not just loans from the federal, state/local governments, and the institution.
Survey Instructions	Revised and clarified what to include and exclude on the IPEDS SFA Survey based on legislative changes, U.S. Department of Education guidance, and industry practices.
Survey Form	Eliminated the multiple forms that were historically presented on the survey materials page; however, there remain differences in how institutions report. Those differences are indicated in gold text on the single remaining form as presented to OMB. Institutions will not see the gold text and will only see the screens that are applicable to them.

Sections that vary by course/program award level and/or student enrollment level

Some questions are not applicable to all institutions. Please see the table below for information. In the materials below, variability is indicated with [gold].

Institutions with Undergraduate and/or Graduate Students	
Student Financial Aid Survey Form	
Section 1	Applicable to all institutions offering undergraduate courses or programs. Applicability determined by: [ICH, Q3, award level = 1a, 1b, 2, 3, 4, 5, and 6; ICH, Q5, Undergraduate (undergraduate or occupational programs), full-time or part-time = Yes; or ICH, Q5, First-time degree/certificate seeking undergraduate, Full-time or Part-time = Yes.
Section 1, Part C, Page 1, Cost of Attendance, and Parts D - G	Moved to new IPEDS Cost survey component (CST).
Section 1, Comparison Chart	Added the All Undergraduates student category back to the Comparison Chart and renumbered the data items.
Section 2	Applicable to all institutions.

Parts that vary by reporter type

Some questions are not applicable to all institutions. Please see the table below for information. In the materials below, variability is indicated with [gold].

Institutions with Undergraduate and/or Graduate Students	
Student Financial Aid Survey Form	
Academic Reporters	
Section 1, Part A	Report Fall 2023 for enrollment (Fall 2022 for prior year enrollment) Fall Enrollment (EF) student counts are preloaded.
Section 1, Part B	Report all undergraduate students enrolled in Fall 2023 for the 2023-24 academic year as defined by the institution.
Section 1, Part C	Report all full-time, first-time degree/certificate-seeking undergraduate students enrolled in Fall 2023 for the 2023-24 academic year as defined by the institution.
Section 1, Comparison Chart	Percentages and average aid amounts based on Fall Enrollment (EF) student counts
Program Reporters	
Section 1, Part A	Report July 1, 2023 to June 30, 2024 for enrollment (July 1, 2022 to June 30, 2023 for prior year enrollment) 12-Month Enrollment (E12) student counts are preloaded
Section 1, Part B	Report all undergraduate students enrolled anytime during the academic period from July 1, 2023 – June 30, 2024
Section 1, Part C	Report all full-time, first-time degree/certificate-seeking undergraduate students enrolled anytime during the academic period from July 1, 2023 – June 30, 2024
Section 1, Comparison Chart	Percentages and average aid amounts based on 12-Month Enrollment (E12) student counts

Data reporting type abbreviations

Throughout these forms, the type of data reported or provided in each field is indicated with an abbreviation. The table below provides information about these abbreviations.

CF	Carried forward. Values are carried forward from other parts of the survey form.
CV	Calculated value. IPEDS calculates the information based on the data provided.
PL	Preloaded value. IPEDS preloads the information for the institution (when available).
PY	Prior year value. IPEDS preloads the information for the institution (when available).
RB	Radio button option. Only one of the options can be selected.
RV	Reported value. All reported values in IPEDS are numerical.

Other SFA specific abbreviations

Throughout these forms, the type of data reported or provided in each field is indicated with an abbreviation. The table below provides information about these abbreviations.

AR	Academic Reporter
PR	Program Reporter

Student Financial Aid Screens 2024-25

Overview

IPEDS Student Financial Aid Component Overview

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

Data Reporting Reminders:

- Report data to accurately reflect the period(s) corresponding with the IPEDS survey component requested, even if such reporting seems inconsistent with prior-year reporting.
- Undergraduate Student Counts
You will be asked to report information for:
 - All undergraduate students
 - Degree/certificate-seeking undergraduate students
 - Full-time, first-time degree/certificate-seeking undergraduate students (FTFT)
 - Non-degree/certificate-seeking undergraduate students
- Interactive Edits and Error Messages
The SFA survey component contains interactive edits to check for blank fields, invalid values, or values outside expected ranges. Some error messages require you to confirm or explain the values entered whereas other error messages are fatal and require you to contact the IPEDS Help Desk at (877) 225-2568 for resolution.
- Context Boxes
You will find optional text boxes throughout the SFA survey component. These text boxes allow you to provide more information or context about the data entered. Some context boxes may be made available to the public on College Navigator, so make sure the information you enter can be understood easily by students, parents, and the public.

Changes in reporting:

The following changes were implemented for the 2024-25 data collection period:

- Moved the cost of attendance and average net price data items to the new IPEDS Cost (CST) survey component.
- Updated the SFA Survey form and instructions based on legislative changes, U.S. Department of Education guidance, and industry practices.
- Applied the screening question from Section 2 to all institutions.
- Applied the context box from Section 2 to all institutions.
- Clarified loans to students reported in Section 1, Part C, Line 7 include private education loans.
- Clarified Fall Enrollment (EF) student counts are carried forward and used to calculate average aid amounts and percentages for academic reporters whereas 12-Month Enrollment (E12) student counts are carried forward and used to calculate average aid amount and percentages for program reporters throughout the survey.
- Eliminated the multiple forms that were historically presented on the survey materials page; however, there remain differences in how institutions report. Those differences are indicated in gold text on the single remaining form as presented to OMB. Institutions will not see the gold text and will only see the screens that are applicable to them.

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 1 - Student Financial Aid - Undergraduate Students

Part A - Establish Your Student Counts

Instructions:

In the fields below, report student counts for the reporting period requested for each student category and financial aid type.

Reporting period loaded based on reporter type: Academic Reporter (AR) OR Program Reporter (PR). Section 1 is applicable to institutions offering undergraduate programs, as determined by the following items in IC Header (ICH):

- Q3, award level = 1a, 1b, 2, 3, 4, 5, and 6; or
- Q5, Undergraduate (undergraduate or occupational programs), full-time or part-time = Yes; or
- First-time degree/certificate seeking undergraduate, Full-time or Part-time = Yes.

Reporting Reminders:

- Part A establishes student counts.
- The numbers on this screen are carried forward to other parts of the Student Financial Aid component and checked for consistency with data reported in other survey components.

STUDENT COUNTS			YOUR CURRENT YEAR DATA	YOUR PRIOR YEAR DATA
			AR: Fall 2023 PR: July 1, 2023 to June 30, 2024	AR: Fall 2022 PR: July 1, 2022 to June 30, 2023
02	All <u>undergraduate</u> students		Editable PL [EF or E12]	PY
03	All degree/certificate-seeking undergraduate students Of those on line 02, those who are degree/certificate-seeking		Editable PL [EF or E12]	PY
04	Of those on line 02, those who are non-degree/certificate-seeking (Line 02 – Line 03)		Editable CV	PY
05	All full-time, first-time degree certificate-seeking undergraduate students Of those on Line 03, those who are full-time, first-time		Editable PL [EF or E12]	PY
06	Of those on Line 05, those awarded any: O <u>Federal Work Study</u> , O <u>Loans to students</u> , O Grant or scholarship aid from the federal government, state/local government, or the institution, or O Other sources known to the institution		RV	PY
07	Of those on Line 05, those awarded any: O <u>Loans to students</u> or O Grant or scholarship aid from the federal government, state/local government, or the institution.		RV	PY

Section 1 - Student Financial Aid - Undergraduate Students
Part B - Enter Student Counts and Financial Aid Award Amounts

Instructions:
In the fields below, report student counts and the total financial aid amount awarded for each student category and financial aid type for the reporting period requested. Enter unduplicated student counts within each aid type (e.g., Federal Pell Grants). However, a student can appear in more than one financial aid program group. Reporting period loaded based on reporter type: Academic Reporter (AR) OR Program Reporter (PR).

- Reporting Reminders:
- Reported values must be consistent with the Information from Part A carried forward to this screen.
 - Report students awarded Federal Pell Grant enrolled in post-baccalaureate teacher certification or licensure programs, or courses required by a state to obtain certification to teach the state as undergraduate students.
 - Report all other students, including students with intellectual disabilities enrolled in a U.S. Department of Education approved comprehensive transition and postsecondary (CTP) program, at the degree/certificate program level assigned by the institution.
 - If students are not admitted and enrolled as degree/certificate seeking taking prerequisites (preparatory courses) offered as part of a Title IV eligible program to satisfy entrance requirements for a Title IV eligible program at your institution or another institution, report them as non-degree/certificate seeking undergraduates.

For this part, report:

For These Students	The Following Type(s) of Aid	Awarded in This Period
- AR: All undergraduate students enrolled in Fall 2023 for the 2023-24 academic year as defined by the institution - PR: All undergraduate students enrolled anytime during the academic year as defined by the institution, which is typically from July 1, 2023 – June 30, 2024	- Grant or scholarship aid from: - o federal government - o state/local government - o the institution - o other sources known to the institution - Loans to students from: - o the federal government	Any time during academic year 2023-24
Information from Part A	AR: Fall 2023 PR: July 1, 2023 – June 30, 2024	
All undergraduate students (This number is carried forward from Part A, Line 02.)	CF	
Degree/certificate-seeking undergraduate students (This number is carried forward from Part A, Line 03.)	CF	
Non-degree/certificate-seeking undergraduate students (This number is carried forward from Part A, Line 04.)	CF	

Aid Type		AR: 2023-24 Academic Year as defined by the institution PR: July 1, 2023 to June 30, 2024											
		All undergraduates				All degree/certificate-seeking undergraduate				All non-degree/certificate-seeking undergraduate			
		Number of students awarded aid	Percentage of students receiving aid	Total amount of aid awarded	Average amount of aid awarded (Col. 3/Col. 1)	Number of students awarded aid	Percentage of students receiving aid	Total amount of aid awarded	Average amount of aid awarded (Col. 7/Col. 5)	Number of students awarded aid (Col. 1 – Col. 5)	Percentage of students receiving aid	Total amount of aid awarded (Col. 3 – Col. 7)	Average amount of aid awarded
		Col. 1	Col. 2	Col. 3	Col. 4	Col. 5	Col. 6	Col. 7	Col. 8	Col. 9	Col. 10	Col. 11	Col. 12
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)	RV	CV	RV	CV	RV	CV	RV	CV	CV	CV	CV	CV
02	<u>Federal Pell Grants</u>	RV	CV	RV	CV	RV	CV	RV	CV	CV	CV	CV	CV
03	Federal loans to students	RV	CV	RV	CV	RV	CV	RV	CV	CV	CV	CV	CV

You may use the box below to provide additional context for the data you have reported above. Context notes will be posted on the College Navigator website. 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).

OPEN CONTEXT BOX

Section 1 - Student Financial Aid - Full-Time, First-Time Undergraduate Students

Part C Enter Information about full-time, first-time degree/certificate-seeking undergraduate students

Instructions:

In the fields below, report student counts and the total financial aid amount awarded for full-time, first-time degree/certificate seeking undergraduates only for each financial aid type. Enter unduplicated student counts within each aid category (e.g., Federal Pell Grants). However, a student can appear in more than one financial aid program group. **Reporting period loaded based on reporter type: Academic Reporter (AR) OR Program Reporter (PR).**

Reporting Reminders:

- Reported values must be consistent with the Information from Part A carried forward to this screen.
- Report all other students, including students with intellectual disabilities enrolled in a U.S. Department of Education approved comprehensive transition and postsecondary (CTP) program, at the degree/certificate program level assigned by the institution.

For this part, report:

For These Students	The Following Type(s) of Aid	Awarded in This Period
AR: Full-time, first-time degree/certificate-seeking undergraduate students enrolled in Fall 2023 for the 2023-24 academic year as defined by the institution. PR: Full-time, first-time degree/certificate-seeking undergraduate students enrolled anytime during the academic year as defined by the institution that falls within July 1, 2023 – June 30, 2024.	- Grant or scholarship aid from: - o federal government - o state/local government - o the institution - Loans to students from: - o the federal government - o other sources, including private or other loans - Do not include: - o grant or scholarship aid from private or other sources - o PLUS loans or loans made to anyone other than the student	o Any time during academic year 2023-24
Information from Part A		AR: Fall 2023 PR: July 1, 2023 to June 30, 2024
Full-time, first-time degree/certificate-seeking undergraduate students (This number is carried forward from Part A, Line 05)		CF
(This number is carried forward from Part A, Line 06) Full-time, first-time degree/certificate-seeking undergraduate students awarded: - o Federal Work Study - o Loans to students - o Grant or scholarship aid from the federal government, state/local government, or the institution - o Other sources known to the institution		CF
(This number is carried forward from Part A, Line 07) Full-time, first-time degree/certificate-seeking undergraduate students awarded: - o Loans to students - o Grant or scholarship aid from the federal government, state/local government, or the institution		CF

Aid Type		FULL-TIME, FIRST-TIME DEGREE/CERTIFICATE SEEKING UNDERGRADUATES from Part A, Line 05				
		CURRENT YEAR DATA				YOUR PRIOR YEAR DATA
		AR: 2023-24 PR: July 1, 2023 to June 30, 2024				AR: 2022-23 PR: July 1, 2022 to June 30, 2023
		Number of FTFT students awarded aid	Percentage of FTFT students awarded aid	Total amount of aid awarded to FTFT students	Average amount of aid awarded to FTFT students	Average amount of aid awarded to FTFT students
		Col. 1	Col. 2	Col. 3	Col. 4	Col. 5
01	Grants or scholarships from the federal government, state/local government, or the institution	RV	CV	CV	CV	PY
02	<u>Federal grant and scholarship aid</u>	RV	CV	CV	CV	PY
03	<u>Federal Pell Grants</u>	RV	CV	RV	CV	PY
04	<u>Other federal grant and scholarship aid</u>	RV	CV	RV	CV	PY
05	<u>State/local government grant or scholarship aid</u> (includes <u>fellowships</u> , waivers, and employee exemptions)	RV	CV	RV	CV	PY
06	<u>Institutional grant or scholarship aid</u> (includes <u>fellowships</u> , waivers, and employee exemptions)	RV	CV	RV	CV	PY
07	<u>Loans to students</u>	RV	CV	CV	CV	PY
08	Federal loans to students	RV	CV	RV	CV	PY
09	Other loans to students (including private loans)	RV	CV	RV	CV	PY

Section 1 : Comparison Chart

Summary Data by Student Category and Financial Aid Type

Instructions for use:

- The SFA Comparison Chart provides a summary of the data reported in Section 1 of the survey. Summary data is based on the preloaded data and information reported on the previous screens in this section for all undergraduate students and full-time, first-time degree/certificate-seeking undergraduate students.
 - Values displayed for *All undergraduate students*, *All degree/certificate seeking undergraduate students*, and *All non-degree/certificate seeking undergraduate students* should match the values reported in Section 1, Part B;
 - Values displayed for *Full-time, First-time degree/certificate seeking undergraduate students* should match the values reported in Section 1, Part C; and
 - NCES calculated values for the student count and total amount of aid awarded for *All other degree/certificate seeking undergraduate students* should be the difference between the values reported for *All undergraduate students* and *Full-time, first-time degree/certificate seeking undergraduate students*.
- If values displayed do not match your institution's calculations, please correct the numbers reported before moving forward to complete Section 2 of the SFA Survey.
- Data for all degree/certificate seeking undergraduate students and full-time, first-time degree/certificate undergraduate students are published on College Navigator.

Note: Data for all other degree/certificate undergraduate students and all non-degree/certificate undergraduate students will appear in the IPEDS Data Center for data users, but not in College Navigator.

		AR: 2023-24 PR: July 1, 2023 to June 30, 2024	Academic year 2023 – 24	Academic year 2023 – 24
Student Categories		Number of students	Federal Pell Grants	Federal Student Loans
		Col. 1	Col.2	Col. 3
01	All undergraduates	CF [Part A, Line 02]		
01a	Number of students awarded aid		CF [Part B, Col. 01, Line 02]	CF [Part B, Col. 01, Line 03]
01b	Percentage awarded aid		CF [Part B, Col. 02, Line 02]	CF [Part B, Col. 02, Line 03]
01c	Total amount of aid awarded		CF [Part B, Col. 03, Line 02]	CF [Part B, Col. 03, Line 03]
01d	Average amount of aid awarded		CF [Part B, Col. 04, Line 02]	CF [Part B, Col. 04, Line 03]
01 02	All degree/certificate seeking undergraduate students	CF [Part A, Line 03]		
02a	Number of students awarded aid		CF [Part B, Col. 05, Line 02]	CF [Part B, Col. 05, Line 03]
02b	Percentage awarded aid		CF [Part B, Col. 06, Line 02]	CF [Part B, Col. 06, Line 03]
02c	Total amount of aid awarded		CF [Part B, Col. 07, Line 02]	CF [Part B, Col. 07, Line 03]
02d	Average amount of aid awarded		CF [Part B, Col. 08, Line 02]	CF [Part B, Col. 08, Line 03]
03	Full-time, first-time degree/certificate seeking undergraduate students	CF [Part A, Line 05]		
03a	Number of students awarded aid		CF [Part C, Col. 01, Line 03]	CF [Part C, Col. 01, Line 08]
03b	Percentage awarded aid		CF [Part C, Col. 02, Line 03]	CF [Part C, Col. 02, Line 08]
03c	Total amount of aid awarded		CF [Part C, Col. 03, Line 03]	CF [Part C, Col. 03, Line 08]
03d	Average amount of aid awarded		CF [Part C, Col. 04, Line 03]	CF [Part C, Col. 04, Line 08]
04	All other degree/certificate seeking undergraduate students	CV [Line 02–Line 03]		
04a	Number of students awarded aid		CV [Col.2, Line 02a–Line 03a]	CV [Col.3, Line 02a–Line 03a]
04b	Percentage awarded aid		CV [Col.2, Line 04a/Col.1, Line 04]	CV [Col.3, Line 04a/Col.1, Line 04]
04c	Total amount of aid awarded		CV [Col.2, Line 02c–Line 03c]	CV [Col.3, Line 02c–Line 03c]
04d	Average amount of aid awarded		CV [Col.2, Line 04c/Col.2, Line 04a]	CV [Col.3, Line 04c/Col.3, Line 04a]
05	All non-degree/certificate-seeking undergraduate students	CF [Part A, Line 04]		
05a	Number of students awarded aid		CF [Part B, Col. 09, Line 02]	CF [Part B, Col. 09, Line 03]
05b	Percentage awarded aid		CF [Part B, Col. 10, Line 02]	CF [Part B, Col. 10, Line 03]
05c	Total amount of aid awarded		CF [Part B, Col. 11, Line 02]	CF [Part B, Col. 11, Line 03]
05d	Average amount of aid awarded		CF [Part B, Col. 12, Line 02]	CF [Part B, Col. 12, Line 03]

Section 2 – Military Servicemembers’ and Veterans’ Benefits - Undergraduate and Graduate Students [Section 2 applicable to all institutions]

Section 2: Screening Question

1. Did your institution participate in the U.S. Department of Veterans Affairs Post-9/11 GI Bill or U.S. Department of Defense Military Tuition Assistance benefit programs during the 2023-24 award period? (You are required to complete Section 2 of the SFA Survey if you answer “Yes” to this screening question.)		
Radio button option	No	
Radio button option	Yes, please check programs all available to students at your institution.	
	Checkbox option	U.S. Department of Veterans Affairs Post-9/11 GI Bill
	Checkbox option	U.S. Department of Defense Military Tuition Assistance

Instructions:

Report student counts and the total benefit amounts for undergraduate and graduate students. Report:

- Post-9/11 GI Bill Benefits for: **July 1, 2023 - June 30, 2024**
- Department of Defense Tuition Assistance Program for: **October 1, 2023 - September 30, 2024**
- Information for **ALL programs** offered by the institution.

Reporting Reminders:

- Report student counts and total benefit amounts disbursed known to the institution for the U.S. Department of Veteran's Affairs Post-9/11 GI Bill Program.
- Report student counts and disbursed amounts received and disbursed by the institution for the U.S. Department of Defense Tuition Assistance Program.
- 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.
- A student may receive benefits at the undergraduate level and the graduate level during award period.
- 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 institutional or state matching share for 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 recipients for the financial assistance program or program level.

U.S. Department of Veterans Affairs Post-9/11 GI-Bill Benefits

Type of benefit/assistance	YOUR CURRENT YEAR DATA			YOUR PRIOR YEAR DATA
	Number of students disbursed benefits/assistance known to the institution Col. 1	Total dollar amount of benefits/assistance disbursed through the known to institution Col. 2	Average dollar amount of benefits/assistance disbursed through the known to institution Col. 3	Average dollar amount of benefits/assistance disbursed through the known to institution Col. 4
<u>Post-9/11 GI Bill Benefits</u>				
01 Undergraduate students	RV	RV	CV[Col. 2/ Col. 1]	PY
02 Graduate students	RV	RV	CV[Col. 2/ Col. 1]	PY
03 Total	CV[Line 01+Line 02]	CV[Line 01+Line 02]	CV[Col. 2/ Col. 1]	PY

U.S. Department of Defense Tuition Assistance Program

Type of benefit/assistance	YOUR CURRENT YEAR DATA			YOUR PRIOR YEAR DATA
	Number of students who received benefits/assistance disbursed through the institution Col. 1	Total dollar amount of benefits/assistance received and disbursed through the institution Col. 2	Average dollar amount of benefits/assistance received and disbursed through the institution Col. 3	Average dollar amount of benefits/assistance received and disbursed through the institution Col. 4
<u>Department of Defense Tuition Assistance Program</u>				
04 Undergraduate students	RV	RV	CV[Col. 2/ Col. 1]	PY
05 Graduate students	RV	RV	CV[Col. 2/ Col. 1]	PY
06 Total	CV[Line 04+Line05]	CV[Line 04+Line05]	CV[Col. 2/ Col. 1]	PY

You may use the box below to provide additional context for the data you have reported above. Context notes will be posted on the College Navigator website. Therefore, you should write all context notes using proper grammar (e.g., complete sentences with punctuation) and common language easily understood by students and parents (e.g., spell out acronyms).

OPEN CONTEXT BOX

Student Financial Aid Instructions 2024-25

Overview

Table of Contents

The Student Financial Aid (SFA) survey component is divided into two sections. Section 1 collects data for undergraduate students only. Section 2 collects data for undergraduate and graduate 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.

Where to Get Help

Where the Data Will Appear

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Section 2. Military Servicemembers' and Veterans' Benefits - Undergraduate and Graduate Students

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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.

Data Collection Information

Here you will find links to:

- Information on IPEDS data reporting and data uses;
- The data collection schedule and survey materials;
- Current and archived survey changes; and
- Current announcements.

IPEDS Survey Components

Here you will find:

- Information on each IPEDS survey component, which includes job aids and FAQs, and
- A link to the IPEDS Survey Methodology.

Reporting Guides and Reporting Tools

Here you will find reporting guides such as glossaries, handbooks, instructions, and software provider resources. Reporting tools include links to IPEDS tutorials; the IPEDS Survey Components and Data Collection Cycle reporting tool, reporting tips, FAQs, and other reporting tools.

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

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

Purpose of Survey Component

The purpose of the IPEDS Student Financial Aid (SFA) survey component is to collect information about financial aid provided to various categories and sub-categories of undergraduate and graduate students at your institution to meet requirements of the:

- Higher Education Act of 1965 (HEA), as amended,
- Executive Order No. 13607, Establishing Principles of Excellence for Educational Institutions Serving Service Members, Veterans, Spouses, and Other Family Members, and
- 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. Continuous improvement efforts at each agency have led to refined and expanded consumer information that student and families may use to make informed postsecondary education decisions.

Student counts and dollar amounts are collected for:

- All undergraduate students,
- Degree/certificate-seeking undergraduate students,
- Full-time, first-time (FTFT) degree/certificate-seeking undergraduate students,
- Non-degree/certificate-seeking undergraduate students, and
- Undergraduate and graduate students who received certain military service and/or veterans education benefits.

Changes in reporting:

The following changes were implemented for the 2024-25 data collection period:

- Moved the cost of attendance and average net price data items to the new IPEDS Cost (CST) survey component.
- Updated the SFA Survey form and instructions based on legislative changes, U.S. Department of Education guidance, and industry practices.
- Applied the screening question from Section 2 to all institutions.
- Applied the context box from Section 2 to all institutions.
- Clarified loans to students reported in Section 1, Part C, Line 7 include private education loans.
- Clarified Fall Enrollment (EF) student counts are carried forward and used to calculate average aid amounts and percentages for academic reporters whereas 12-Month Enrollment (E12) student counts are carried forward and used to calculate average aid amount and percentages for program reporters throughout the survey.
- Eliminated the multiple forms that were historically presented on the survey materials page; however, there remain differences in how institutions report. Those differences are indicated in gold text on the single remaining form as presented to OMB. Institutions will not see the gold text and will only see the screens that are applicable to them.

Section 1. SFA - Undergraduate Students

General Instructions

Report students in the categories and sub-categories described enrolled during the period(s) requested who received the types of aid as defined for IPEDS reporting purposes.

Who Must Report

All institutions participating or eligible to participate in Title IV financial aid programs and had students enrolled during the prior academic year must report data to IPEDS. Non-Title IV institutions may and are strongly encouraged but are not required to submit data.

Data Reporting Reminders:

- Report data to accurately reflect the period(s) corresponding with the IPEDS survey component requested, even if such reporting seems inconsistent with prior-year reporting.
- Report financial aid programs under the correct funding source (i.e., federal, state, or local government, the institution, private entity, etc.).
- Contact the financial aid office if you are not sure where to report matching funds or financial aid received by the institution for the student.
- If there are no students in a category or sub-category, enter zero (0). Do NOT leave the cell blank.
- Report student counts and total benefit amounts disbursed known to the institution for the U.S. Department Veteran's Affairs Post-9/11 GI Bill Program.
- Report student counts and disbursed amounts received and disbursed by the institution for the U.S. Department of Defense Tuition Assistance Program.
- Report unduplicated student counts for each aid type.
- 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 or state aid provided through the Yellow Ribbon Program if your school participated.

NOTE: In Section 2 of the SFA survey component, all institutions, including program reporters, should report information for ALL programs (not just the largest program).

What You Will Need

The institution's financial aid system should be the starting point for reporting to the IPEDS SFA survey component. Data providers should also be familiar with college and university practices associated with student financial aid and other financial assistance benefits.

In general, there are three types of financial aid data that will be requested in this component. These types are:

- Student counts by financial aid type and student categories;
- Total financial aid dollars awarded to these students, and
- Total military and veterans' education benefits dollars disbursed to students known to the institution.

To complete Section 1 of this survey component, data providers will need student counts and financial aid award amounts for:

- All undergraduate students,
- Degree/certificate-seeking undergraduate students,
- Full-time, first-time degree/certificate-seeking undergraduate students, and
- Non-degree/certificate-seeking undergraduate students.

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To complete Section 2 of this survey component, you will need student counts, and military tuition assistance and Post-9/11 benefit disbursed amounts for:

- Undergraduate students, and
- Graduate students.

If you are not familiar with these educational benefits, a general synopsis of each program is provided below.

U.S. Department of Veterans Affairs Post-9/11 GI Bill program

- Effective August 1, 2009, includes payment of tuition and fees, a monthly housing allowance, and a books and supplies stipend.
- Tuition and fees are paid directly to the institution on behalf of students and data on materials, books, supplies, and housing amounts is available to the institution; thus, institutions should know which students have Post-9/11 GI Bill benefits and the benefit amounts.
- Educational benefits can be transferred to eligible dependents.
- Program expanded in 2011 to cover non-degree-granting programs, apprenticeships/on-the-job training programs, flight training programs, and training correspondence.
- The Post-9/11 GI Bill Yellow Ribbon program is an institutional aid matching program which covers tuition and fees for students attending participating institutions only.

For information on additional program benefits, see *How can I use my Post-9/11 GI Bill (Chapter 33) benefits?* at <https://www.va.gov/education/about-gi-bill-benefits/post-9-11/>

U.S. Department of Defense (DOD) Tuition Assistance Program

- Available to active duty servicemembers, reservists called to active duty, and their spouses.
- Includes the U.S. National Guard and the U.S. Coast Guard.
- Eligibility criteria may vary by branch of service.
- 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 at <http://www.dodmou.com/> and visit <https://www.dantes.mil/mil-ta/> for specific information for each U.S. military service branch.

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

Several types of data appear in the SFA Survey component. It includes data values:

- Provided based on the institution's financial aid records,
- Provided in prior years displayed for comparison with current year data (i.e., the data being reported),
- Carried forward from the IPEDS Fall Enrollment (EF) survey completed during the most recent EF data collection (Academic year reporters),
- Carried forward from the IPEDS 12-Month Enrollment (E12) survey completed during the most recent E12 data collection (Program reporters),
- Carried forward from one part of the Student Financial Aid survey to another part to ensure internal data consistency, and
- Calculated by NCES from reported data values.

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.

Federal, state/local government, institutional, and private grants, scholarships, and loan aid are collected in Section 1 of the SFA Survey. This includes data for all Title IV programs except Federal Work Study awards and earnings.

The Post-9/11 GI Bill and Tuition Assistance programs highlight two of many educational benefits provided to military servicemembers, veterans, and eligible dependents. However, from a national perspective, Post-9/11 GI Bill and Tuition Assistance programs are more likely to be found across over 6,000 IPEDS institutions. Data on these programs is collected in Section 2 of the SFA Survey.

Data reporters should work closely with data providers, the institution's data owners and state and system data collection coordinators to confirm data values carried forward and calculated are consistent with the data in the institution's records. If the data carried forward or calculated are not consistent with the institution's records, then a data item change or 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 so that 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.

Coverage

Reporting Period

The financial aid data reported for this survey component should be for the prior academic year as defined by the institution, including cross-over financial aid award periods assigned to the prior academic year. Contact your institution's financial aid office if you have questions about cross-over award periods.

Note U.S. Department of Veterans Affairs Post-9/11 GI Bill program benefits and U.S. Department of Defense Tuition Assistance benefits are reported to IPEDS for different time periods. The reporting period for Post-9/11 GI Bill program benefits is July 1 to June 30. The reporting period Department of Defense Tuition Assistance program benefits is October 1 to September 30.

Student Cohort

Section 1: For academic reporters, the student cohort covered by the SFA survey component includes undergraduate students enrolled for the prior academic year as of October 15 or as of the institution's official fall reporting date. For program reporters, the student cohort covered by this survey component includes undergraduate students enrolled any time during the academic period from [July 1, 2023 – June 30, 2024](#). For hybrid reporters, the student cohort covered includes undergraduate students enrolled in the prior academic year between August 1 and October 31.

Section 2: For all institutions, the student cohort covered by this section of the SFA Survey includes all undergraduate and graduate students enrolled any time during the prior academic year disbursed benefits for the award period known to the institution.

What to Include

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. Report 100% of student FSEOG award amounts. That is, include the federal and matching share, regardless of the source of the match. Also, FSEOG 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 and scholarships (including educational assistance funds):** Grants and scholarships provided by federal agencies such as the U.S. Department of Education. Include Title IV federal student aid program grants such as Federal Pell Grants, FSEOG, and TEACH Grants and federal grants and scholarships awarded by various Department of Health and Human Services (HHS) agencies. Also include need-based and merit-based educational assistance funds and training vouchers provided from other federal agencies and federally- sponsored educational benefits programs.

Do not include veterans' education benefits, as defined in section 480(c) of the HEA of 1965 as amended. For more information, see the *Guidance on Federal Veterans' Education Benefits for Purposes of the Title IV Student Assistance Programs* Q&A posted on August 30, 2009, on the Federal Student Aid Knowledge Center website.

- **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 at the institution; in community service activities on- campus or off-campus; or 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. It includes, but is not limited to, assistantships, apprenticeships, internships, externships, and cooperative education experiences. It may also include work-based fellowships. 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. 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. It includes all Title IV federal student loan aid such as Subsidized Direct Loans and Unsubsidized Direct Loans. It also includes Health Professions Student Loans, Loans for Disadvantaged Students, Nursing Student Loans, Primary Care Loans, and other federal student loans. Do not include PLUS loans and other federal loans not made directly to the student.
- **State/local government grants and scholarships (includes fellowships, waivers, and employee exemptions):** Grants, scholarships, fellowships, and waivers funded or awarded by the state/local government **where the institution is located including the state matching share** of Leveraging Educational Assistance Partnerships (LEAP) (formerly SSIGs), the Special Leveraging Educational Assistance Program (SLEAP), the Grants for Access and Persistence (GAP) Program, and other awards to students. Include need-based and merit-based grants or scholarships provided by a state or local government. Also include tuition and fee waivers, and employee exemptions for which your institution was reimbursed by a state or local government agency. Do not include the federal or institutional share of grant, scholarship, fellowship, waiver awards or employee exemption. Do not include federal or other pass-through funds known to the institution (i.e., funding provided to the institution by the state for students on behalf of a non-state or non-local entity).
- **Institutional grants and scholarships (including fellowships, waivers, and employee exemptions):** Grants, scholarships, fellowships and waivers granted and funded, or awarded by the institution and/or individual departments within the institution limited to students attending the institution. 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, and employee exemptions for which your institution was not reimbursed by a state or local government agency. Include institutional grants, and the non-work-study portion of scholarships, fellowships, and waivers used to satisfy matching requirements for other programs. Do not include the work study portion of awards. Do not include grants, scholarships, fellowships, waivers, and employee exemptions passed through to the institution from other entities if the institution does not select or designate the recipient. Do not include the institutional or state matching share of Post-9/11 Yellow Ribbon tuition and fee waivers.
- **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 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 also known as pass-through funds (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 such as Income Share Agreements. Do not include loans that are not made directly to the student (i.e., the student is not a 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.
- **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, supplies, and housing are sent directly to the student. Some benefits may be transferred to dependents. Do not include Yellow Ribbon Program institutional or state match.
- **Department of Defense Military Tuition Assistance Program:** A federal program available to eligible servicemembers, which includes active duty, selected reservist, coast guard, and army national guard personnel to pay up to 100% of college tuition and course-specific fees. Funds are paid directly to the institution for enrollment in a U.S. Department of Education accredited postsecondary institution to support voluntary off-duty professional and self-development education goals.
- **Other Sources Known to the Institution:** This includes other types of aid not listed in any of the aid types defined above but not excluded in the SFA survey component instructions.

NOTE: In this component, "aid awarded" refers to grant, scholarship, or loan aid awarded to students. For grant or scholarship aid, institutions should report aid awarded to students. This amount may be different from the amount 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 loans to students, institutions should report loans awarded to and accepted by the student. Institutions report Post-9/11 veterans' benefits **disbursed** known to the institution, and DOD Tuition Assistance benefits **received and disbursed through the institutions** during the reporting periods requested.

Institutions report different financial aid types for undergraduate and graduate students on the SFA Survey. Please read the instructions carefully on each screen to identify the enrollment period, types of aid, and reporting period required. Video tutorials on types of aid and student categories are available on the Association for Institutional Research (AIR) website: [https://www.airweb.org/collaborate-learn/professional-development-training/ipeds-tutorials/student-financial-aid-\(sfa\)](https://www.airweb.org/collaborate-learn/professional-development-training/ipeds-tutorials/student-financial-aid-(sfa))

Total financial aid amounts and student counts are reported in this survey component. Round total aid amounts to the nearest whole dollar. Do not report cents. Report unduplicated student counts within a given financial aid type (e.g., Federal Pell Grants). However, count each student once for each type of aid. This means a student may appear under more than one aid type (e.g., Federal Pell Grants and Federal Loans to Students).

Section 1, SFA - Undergraduate Students

Detailed Instructions

This section provides line-by-line instructions for each part in Section 1 of the Student Financial Aid component.

Purpose

The purpose of the section is to collect student counts and financial aid amounts for degree/certificate-seeking undergraduate students and non-degree-certificate seeking undergraduate students enrolled during the 2023-24 academic year.

What NOT to Include

Do not report student counts or aid amounts in Section 1 for the following:

- Students who were only graduate students at the institution during the reporting period and
- Students in U.S. Department of Education Experimental sites projects.

Do not report:

- Federal Work Study amounts into any total aid amounts,
- ROTC aid, which is excluded from estimated financial assistance, also known as EFA, 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, or
- Experimental Sites federal financial aid amounts

Part A - Establish Your Student Counts

Part A establishes student counts. Consult with the institution's enrollment data reporter to edit the preloaded student counts on Lines 02 -05 carried forward from the [\[EF Survey—Academic Reporters, E12—Program Reporters\]](#) if needed. Disaggregate the full-time, first-time degree/certificate seeking undergraduate student count reported on Line 05 to report student counts by the financial aid types listed on Lines 06 – 07. Note the data you report on this screen is carried forward to other parts of the Student Financial Aid Survey component and used to perform Cost and Net Price Survey edit checks.

Instructions:

In the fields provided, report the student counts for each student category below. Some values are preloaded from your institution's IPEDS Fall Enrollment (EF) survey component (for academic reporters) or 12-Month Enrollment (E12) survey component for program reporters; these 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.

Line	Description
02.	All undergraduate students [Editable Preload EF—Academic Reporters, E12—Program reporters] For academic reporters, report an unduplicated count of all undergraduate students enrolled for the prior academic year as of October 15 or your institution's official fall reporting date. For program reporters, report an unduplicated count of all undergraduate students enrolled anytime 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 Fall 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.
03.	All degree/certificate-seeking undergraduate students [Editable Preload EF—Academic Reporters, E12—Program reporters] Of those on line 02, those who are degree/certificate-seeking For academic reporters, report the number of degree/certificate-seeking undergraduate students enrolled for the prior academic year as of October 15 or your institution's official fall reporting date. For program reporters, report the number of degree/certificate seeking undergraduate students enrolled during the prior academic year. Include all new and continuing degree/certificate-seeking undergraduate students. This number will be preloaded from your institution's IPEDS Fall Enrollment Survey (EF) for academic reporters or IPEDS 12-Month Enrollment Survey (E12) for program reporters, 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.
04..	All non-degree/certificate-seeking undergraduate students [Editable Preload EF—Academic Reporters, E12—Program reporters] Of those on Line 02 (all undergraduate students), those who are non-degree/certificate-seeking For academic reporters, report the number of non-degree/certificate-seeking undergraduate students enrolled for the prior academic year as of October 15 or your institution's official fall reporting date. For program reporters, report the number of non-degree/certificate-seeking undergraduate students enrolled for the prior academic year, which is typically July1 – June 30. Include all new and continuing non-degree/certificate-seeking undergraduate students. This number will be preloaded from your institution's IPEDS Fall Enrollment Survey (EF) for academic reporters or IPEDS 12-Month Enrollment Survey (E12) for program reporters, 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.
05.	All full-time, first-time degree/certificate-seeking undergraduate students [Editable Preload EF—Academic Reporters, E12—Program reporters] Of those on Line 02, those who are full-time, first-time degree/certificate seeking undergraduates Report the number of students who are full-time, first-time degree/certificate-seeking undergraduates. This number will be preloaded from your institution's IPEDS Fall 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.
06.	Of the full-time, first-time degree certificate-seeking undergraduate students on Line 05), those awarded any of the following (Reported value): • Federal Work Study; • 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, including private grants and scholarships (e.g., Rotary Club Scholarship).
07.	Of the full-time, first-time degree certificate-seeking undergraduate students on Line 05, those awarded any of the following (Reported value): • Government and/or private loans to students; or • Grant or scholarship aid from the federal government, state/local government, or the institution.

Part B - Financial Aid About All Undergraduate Students

This part collects information about the number of **undergraduate** students. Student counts reported in Section 1, Part A, Lines 02 – 04 are carried forward for all undergraduates, all degree/certificate seeking undergraduates, and all non-degree/certificate seeking undergraduates and cannot be edited on this screen. Report the student counts requested in Column 1 and Column 5, and total aid amounts requested in Column 3 and Column 7 by aid types listed on Lines 01 – 03. All other row and column values are calculated for the institution by NCES, which includes percentages of students awarded aid and average aid amounts.

Note: The disaggregated student counts reported by aid type for each student category must equal the values carried forward listed under Information from Part A. Because financial aid types reported are disaggregated by financial aid program or program group(s) and students may be awarded from more than one program, each program or program group student count reported must be less than or equal to the student count reported for the main or primary financial type. For example, Federal Pell Grant student counts reported cannot exceed the student count reported for Grant or scholarship aid from the federal government, state/local government, the institution, and other sources known to the institution. You will get an error message if data reported do not meet these conditions.

Reporting Reminders:

- Reported values must be consistent with the Information from Part A carried forward to this screen.
- Report students awarded Federal Pell Grant enrolled in post-baccalaureate teacher certification or licensure programs, or courses required by a state to obtain certification to teach the state as undergraduate students.
- Report all other students, including students with intellectual disabilities enrolled in a U.S. Department of Education approved comprehensive transition and postsecondary (CTP) program, at the degree/certificate program level assigned by the institution.
- Report students not admitted and enrolled as degree/certificate seeking taking prerequisites (predatory courses) offered as part of a Title IV eligible program to satisfy entrance requirements for a Title IV eligible program at your institution or another institution as non-degree/certificate seeking undergraduates.

For These Students	The Following Type(s) of Aid	Awarded in This Period
• AR: All undergraduate students enrolled in Fall 2023 for the 2023-24 academic year as defined by the institution • PR: All undergraduate students enrolled anytime during the academic year as defined by the institution, which is typically from July 1, 2023 – June 30, 2024	• Grant or scholarship aid from: - o federal government - o state/local government - o the institution - o other sources known to the institution • Loans to students from: - o the federal government	• Any time during academic year 2023-24
Information from Part A		AR: Fall 2023 PR: July 1, 2023 – June 30, 2024
All undergraduate students (This number is carried forward from Part A, Line 02.)		CF
Degree/certificate-seeking undergraduate students (This number is carried forward from Part A, Line 03.)		CF
Non-degree/certificate-seeking undergraduate students (This number is carried forward from Part A, Line 04.)		CF

The total student count for each student category is preloaded at the top of the screen. Reported student counts in each aid category cannot be greater than this preloaded number.

Instructions:

In the fields provided, report the number of students in each category and the total amount of aid awarded.

Line	Description
01	Grant or scholarship aid from the federal government, state/local government, the institution, or other sources known to the institution. This type of aid is a program group. It includes all federal, state/local, and institutional grant and scholarship aid described for each entity as defined for IPEDS reporting purposes in the What to Include section of the SFA Survey Instructions.
	All undergraduates
	Column 1. Number of undergraduate students awarded one or more type of grant or scholarship aid from the federal government, state/local government, the institution, or other sources known to the institution. (Reported value) This is an unduplicated student count. If a student was awarded aid from more than one type listed on Lines 01 through 02, count the student once for Line 01. This student count must be greater than or equal to the student count reported on Line 02. Do not include work study awards or earnings; veteran's education benefits; military service education benefits; students awarded grants or scholarships from private sources only (e.g., Rotary Club Scholarship); other specifically excluded from this financial aid program group in Section 1 of the instructions.
	Column 2. Percentage of undergraduate students awarded one or more types of grants or scholarship aid from the federal government, state/local government, the institution, or other sources known to the institution. (Calculated value)
	Column 3. Total dollar amount of financial aid awarded for this program group to undergraduate students (Reported value).
	Column 4. Average dollar amount of grant or scholarship aid from the federal government, state/local government, the institution, or other sources known to the institution awarded to undergraduate students. (Calculated value)
	All degree/certificate seeking undergraduates
	Column 5. Number of degree/certificate undergraduate students awarded one or more type of grant or scholarship aid from the federal government, state/local government, the institution, or other sources known to the institution. (Reported value) This is an unduplicated student count. If a student was awarded aid from more than one type listed on Lines 01 through 02, count the student once for Column 5, Line 01. This student count must be greater than or equal to the student count reported in Column 5, Line 02. Do not include work study awards or earnings; veteran's education benefits; military service education benefits; students awarded grants or scholarships from private sources only (e.g., Rotary Club Scholarship); other specifically excluded from this financial aid program group in Section 1 of the instructions.
	Column 6. Percentage of degree/certificate seeking undergraduate students awarded one or more types of grants or scholarship aid from the federal government, state/local government, the institution, or other sources known to the institution. (Calculated value)
	Column 7. Total dollar amount of financial aid awarded for this program group to degree/certificate seeking undergraduate students (Reported value).
	Column 8. Average dollar amount of grant or scholarship aid from the federal government, state/local government, the institution, or other sources known to the institution awarded to degree/certificate seeking undergraduate students. (Calculated value)
	All non-degree/certificate seeking undergraduates
	Column 9. Number of non-degree/certificate undergraduate students awarded one or more type of grant or scholarship aid from the federal government, state/local government, the institution, or other sources known to the institution. (Calculated value) This is an unduplicated student count. If a student was awarded aid from more than one type listed in Column 09, Lines 01 through 02, count the student once for Column 9, Line 01. This student count must be greater than or equal to the student count reported in Column 9, Lines 02. Do not include work study awards or earnings; veteran's education benefits; military service education benefits; students awarded grants or scholarships from private sources only (e.g., Rotary Club Scholarship); other specifically excluded from this financial aid program group in Section 1 of the instructions.
	Column 10. Percentage of degree/certificate seeking undergraduate students awarded one or more types of grants or scholarship aid from the federal government, state/local government, the institution, or other sources known to the institution. (Calculated value)
	Column 11. Total dollar amount of financial aid awarded for this program group to degree/certificate seeking undergraduate students (Calculated value).
	Column 12. Average dollar amount of grant or scholarship aid from the federal government, state/local government, the institution, or other sources known to the institution awarded to degree/certificate seeking undergraduate students. (Calculated value)

02	Federal Pell Grants. (Add IPEDS glossary link)
	All undergraduates
	Column 1. Total number of undergraduate students awarded a Federal Pell Grant. (Reported value) This is an unduplicated count. Count each student who received a Federal Pell Grant once on Line 02. This student count must be less than or equal to the federal grant and scholarship aid count reported in Column 1, Line 01.
	Column 2. Percentage of undergraduate students awarded a Federal Pell Grant. (Calculated value)
	Column 3. Total dollar amount of all Federal Pell Grants awarded to undergraduate students. (Reported value)
	Column 4. Average dollar amount of Federal Pell Grants awarded to undergraduates. (Calculated value)
	All degree/certificate seeking undergraduates
	Column 5. Number of degree/certificate undergraduate students awarded a Federal Pell Grant. (Reported value) This is an unduplicated student count. Count the student once for Line 02 even if the student received more than one full Federal Pell Grant award under the year-round Pell (also known as additional Pell) program. This count must be less than or equal to the count reported in Column 5, Line 01.
	Do not include work study awards or earnings; veteran's education benefits; military service education benefits; students awarded grants or scholarships from private sources only (e.g., Rotary Club Scholarship); other specifically excluded from this financial aid program group in Section 1 of the instructions.
	Column 6. Percentage of degree/certificate seeking undergraduate students awarded a Federal Pell Grant. (Calculated value)
	Column 7. Total dollar amount of Federal Pell Grant awarded to degree/certificate seeking undergraduate students (Reported value).
	Column 8. Average dollar amount of Federal Pell Grant awarded to degree/certificate seeking undergraduate students. (Calculated value)
03	All non-degree/certificate seeking undergraduates
	Column 9. Number of non-degree/certificate undergraduate students awarded a Federal Pell Grant. (Calculated value) This is an unduplicated student count. Count the student once in Column 09, Line 02 even if the student received more the one full Federal Pell Grant award under the year-round Pell (also known as additional Pell) program. This student count must be less than or equal to the student count reported in Column. 9, Lines 01. Do not include work study awards or earnings; veteran's education benefits; military service education benefits; students awarded grants or scholarships from private sources only (e.g., Rotary Club Scholarship); other specifically excluded from this financial aid program group in Section 1 of the instructions.
	Column 10. Percentage of non-degree/certificate seeking undergraduate students awarded a Federal Pell Grant. (Calculated value)
	Column 11. Total dollar amount of Federal Pell Grant awarded to non-degree/certificate seeking undergraduate students (Calculated value).
	Column 12. Average dollar amount of Federal Pell Grant awarded to non-degree/certificate seeking undergraduate students. (Calculated value)
	Federal loans to students. Report loans awarded and accepted by the student from the federal government that must be repaid by the student for which the student is the designated borrower. Includes all Title IV federal student loan aid such as Subsidized Direct Loans and Unsubsidized Direct Loans. Also include Health Professions Student Loans, Loans for Disadvantaged Students, Nursing Student Loans, Primary Care Loans, and other federal student loans. Do not include PLUS loans or other federal loans for which the student is not a primary borrower.
	All undergraduates
	Column 1. Total number of undergraduate students awarded (and who accepted) a federal student loan. (Reported value) This is an unduplicated count. Count each student who received a federal student loan once on Line 03. Do not include loans to others (e.g., PLUS loans to parents or federal loans for which the student is not a primary borrower) and do not include state/local, institutional, or private loans.
	Column 2. Percentage of undergraduate students awarded (and who accepted) a federal student loan. (Calculated value)
	Column 3. Total dollar amount of federal student loans awarded to and accepted by undergraduate students. (Reported value)
	Column 4. Average dollar amount of federal student loans awarded and accepted by undergraduate students. (Calculated value)
	All degree/certificate seeking undergraduates
Column 5. Total number of degree/certificate seeking undergraduate students awarded (and who accepted) a federal student loan. (Reported value) This is an unduplicated count. Count each student who received a federal student loan once in Column 5, Line 03. Do not include loans to others (e.g., PLUS loans to parents or federal loans for which the student is not a primary borrower) and do not include state/local, institutional, or private loans.	
Column 6. Percentage of degree/certificate seeking undergraduate students awarded (and who accepted) a federal student loan. (Calculated value)	
Column 7. Total dollar amount of federal student loans awarded to and accepted by degree/certificate seeking undergraduate students. (Reported value)	
Column 8. Average dollar amount of federal student loans awarded and accepted by degree/certificate seeking undergraduate students. (Calculated value)	
All non- degree/certificate seeking undergraduates	
Column 9. Total number of non-degree/certificate seeking undergraduate students awarded (and who accepted) a federal student loan. (Reported value) This is an unduplicated count. Count each student who received a federal student loan once in Column 9, Line 03. Do not include loans to others (e.g., PLUS loans to parents or federal loans for which the student is not a primary borrower) and do not include state/local, institutional, or private loans.	
Column 10. Percentage of non-degree/certificate seeking undergraduate students awarded (and who accepted) a federal student loan. (Calculated value)	
Column 11. Total dollar amount of non-federal student loans awarded to and accepted by degree/certificate seeking undergraduate students. (Reported value)	
Column 12. Average dollar amount of federal student loans awarded and accepted by non-degree/certificate seeking undergraduate students. (Calculated value)	

Part C - Enter Financial Aid about full-time, first-time degree/certificate-seeking undergraduate students [Reporting period loaded based on reporter type: Academic reporter (AR) OR Program Reporter (PR)]

This part collects information about the number of **full-time, first-time degree/certificate-seeking undergraduate** students and the total amounts of aid awarded by aid types. For academic reporters, this includes full-time, first-time degree/certificate seeking undergraduate students enrolled in the prior Fall. For Program Reporters, this includes full-time, first-time degree/certificate-seeking undergraduate students enrolled anytime during the prior academic period from July 1 – June 30.

Student counts reported in Section 1, Part A, Lines 05 – 07 are carried forward for full-time, first-time degree/certificate seeking undergraduates and cannot be edited on this screen. Report the student counts requested in Column 1 and total aid amounts requested in Column 3 by the aid types listed on Lines 01 – 09. Prior year average aid amounts are listed in Column 5. All other row and column values are calculated for the institution by NCES, which includes percentages of students awarded aid and average aid amounts.

Note: The disaggregated student counts reported by aid type in each sub-category of full-time, first-time degree/certificate undergraduate students must equal the values carried forward listed under Information from Part A. Because financial aid types reported are disaggregated by financial aid program or program group(s) and students may be awarded from more than one program, each program or program group student count reported must be less than or equal to the student count reported for the main or primary financial type. For example, the sum of student counts reported for federal loans to students and other loans to students (including private loans) cannot exceed the student count reported for loans to students. You will get an error message if data reported do not meet these conditions.

Reporting Reminders:

- Reported values must be consistent with the Information from Part A carried forward to this screen.
- Report all students, including students with intellectual disabilities enrolled in a U.S. Department of Education approved comprehensive transition and postsecondary (CTP) program, at the degree/certificate program level assigned by the institution.

For this part, report:

For These Students	The Following Type(s) of Aid	Awarded in This Period
[AR: Full-time, first-time degree/certificate-seeking undergraduate students enrolled in Fall 2023 for the 2023-24 academic year as defined by the institution] [PR: Full-time, first-time degree/certificate-seeking undergraduate students enrolled anytime during the academic year as defined by the institution, which is typically from July 1, 2023 – June 30, 2024]	- Grant or scholarship aid from: - o federal government - o state/local government - o the institution - Loans to students from: - o the federal government - o other sources, including private or other loans - Do not include: - o grant or scholarship aid from private or other sources - o PLUS loans or loans made to anyone other than the student	Any time during academic year 2023-24

Information from Part A:	
Full-time, first-time degree/certificate-seeking undergraduate students	[AR: FALL 2023 PR: July 1, 2023 to June 30, 2024]
- Full-time, first-time degree/certificate-seeking undergraduate students awarded: - o Federal Work Study - o Loans to students - o Grant or scholarship aid from the federal government, state/local government, or the institution - o Other sources known to the institution	Carried forward from Part A Line 05
- Full-time, first-time degree/certificate-seeking undergraduate students awarded: - o Loans to students - o Grant or scholarship aid from the federal government, state/local government, or the institution	Carried forward from Part A Line 06
- Full-time, first-time degree/certificate-seeking undergraduate students awarded: - o Loans to students - o Grant or scholarship aid from the federal government, state/local government, or the institution	Carried forward from Part A Line 07

In the fields provided, report the number of full-time, first-time degree/certificate-seeking (FTFT DGCS) undergraduate students and the total amount of aid they were awarded for each type of aid.

Line	Description
01	Grant or scholarship aid from the federal government, state/local government, and the institution. This type of aid is a program group. It includes all federal, state/local, and institutional grant and scholarship aid described for each entity as defined for IPEDS reporting purposes in the What to Include section of the SFA Survey Instructions.
	Column 1. Number of FTFT DGCS students awarded one or more grant or scholarship aid from the federal government, state/local government, or the institution. (Reported value) This is an unduplicated student count. If a student appears in more than one type of aid category on Lines 02 through 06, that student should only be counted once for Line 01. This student count must be greater than or equal to largest student count reported on Lines 02, 05, and 06.
	Do not include work study awards or earnings; veteran's education benefits; military service education benefits; students awarded grants or scholarships from private sources only (e.g., Rotary Club Scholarship); or others specifically excluded from this financial aid program group in Section 1 of the instructions.
	Column 2. Percentage of FTFT DGCS students awarded one or more grant or scholarship aid from the federal government, state/local government, or the institution. (Calculated value)
	Column 3. Total dollar amount of financial aid awarded for this program group to FTFT DGCS. (Calculated value = [(Line 02, Column 3) + (Line 05, Column 3) + (Line 06, Column 3)])
	Column 4. Average dollar amount of grant or scholarship aid from the federal government, state/local government, or the institution awarded to FTFT DGCS students. (Calculated value)
02	Column 5. Average dollar amount of grant or scholarship aid from the federal government, state/local government, or the institution awarded to FTFT DGCS students. (Prior year value)
	Federal grant and scholarship aid This aid category is disaggregated into one financial aid program—Federal Pell Grants—and a program group—Other federal grant and scholarship aid. Report the federal share of grants and scholarships provided by federal agencies such as the U.S. Department of Education. Include Title IV federal student aid program grants such as Federal Pell Grants, FSEOG, and TEACH Grants and federal grants and scholarships awarded by other federal agencies/entities such as the Department of Health and Human Services, or (HHS) agencies. 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 veterans' education benefits, as defined in section 480(c) of the HEA of 1965, as amended. For more information, see the Guidance on Federal Veterans' Education Benefits for Purposes of the Title IV Student Assistance Programs Q&A posted on August 30, 2009, on the Federal Student Aid Knowledge Center website. Do not include Post 9-11 Veterans' education assistance or Department of Defense Tuition Assistance benefits since these programs are reported in Section 2 of the SFA survey component.
	Column 1. Number of FTFT DGCS students awarded one or more types of federal grant or scholarship aid. (Reported value) This is an unduplicated count. If a student was awarded aid from more than one type listed on Lines 03 through 04, count the student once on Line 02. This student count must be less than or equal to the student count reported on Line 01, and greater than or equal to the largest student count reported on Lines 03 and 04.
	Column 2. Percentage of FTFT DGCS students awarded federal grant and scholarship aid. (Calculated value)
	Column 3. Total dollar amount of all financial aid awarded for this program group. (Calculated value = [(Line 03, Column 3) + (Line 04, Column 3)])
03	Column 4. Average dollar amount of federal grant and scholarship aid awarded to FTFT DGCS students. (Calculated value)
	Column 5. Average dollar amount of federal grant and scholarship aid awarded to FTFT DGCS students. (Prior year value)
	Federal Pell grants
	Column 1. Number of FTFT DGCS students awarded a Federal Pell Grant. (Reported value) This is an unduplicated count. Count each student who received a Federal Pell Grant once on Line 03. Count the student once even if the student received more than one full Federal Pell Grant award under the year-round Pell (also known as additional Pell) program. This student count must be less than or equal to the Federal grant and scholarship aid count reported in Column 1, Line 02.
	Column 2. Percentage of FTFT DGCS students awarded a Federal Pell Grant. (Calculated value)
	Column 3. Total dollar amount of all Federal Pell Grants awarded to FTFT DGCS students. (Reported value)
04	Column 4. Average amount of Federal Pell Grants awarded to FTFT DGCS students. (Calculated value)
	Column 5. Average dollar amount of Federal Pell Grants awarded to FTFT DGCS students. (Prior year value)
	Other federal grant and scholarship aid Report the federal share only. Do not include Post-9/11 Yellow Ribbon institutional or state tuition and fee waivers.
	Column 1. Number of FTFT DGCS students awarded other federal grant and scholarship aid (include Title IV grant aid other than a Pell grant). (Reported value) This is an unduplicated count and must be less than or equal to the Federal grants and scholarships aid count reported in Column 1, Line 02. Do not include students awarded Federal Pell Grants only.
	Column 2. Percentage of FTFT DGCS students awarded Other federal grant and scholarship aid awarded to FTFT DGCS students. (Calculated value)
	Column 3. Total dollar amount of all Other federal grant and scholarship aid awarded to FTFT DGCS students. (Reported value)
	Column 4. Average dollar amount of Other federal grant and scholarship aid awarded to FTFT DGCS students. (Calculated value)
	Column 5. Average dollar amount of Other federal grant and scholarship aid awarded to FTFT DGCS students. (Prior year value)

Line	Description
05	State/local government grant or scholarship aid (includes fellowships, waivers, and employee exemptions) Report grants, scholarships, fellowships, waivers, and employee exemptions funded or awarded by the state or local government where the institution is located. Include all municipalities, townships, and other jurisdictions within the state. Include need-based and merit-based grants and scholarships. Also include tuition and fee waivers, and employee exemptions for which your institution was reimbursed by a state or local government agency. Report the state and local share of the awards only. Do not include the federal or institutional shares of grant, scholarship, fellowship, waiver, or employee exemption awards. Do not include funds known and passed through to the institution for the student by the state on behalf of a non-state or non-local entity.
	Column 1. Number of FTFT DGCS students awarded grant or scholarship aid from a state/local government. (Reported value) This is an unduplicated count and must be less than or equal to grant or scholarship aid from the federal government, state/local government, or the institution in Column 1, Line 01. Do not include federal or institutional grant or scholarship aid, or other aid known to the institution from a non-state or non-local entity.
	Column 2. Percentage of FTFT DGCS students awarded grant or scholarship aid from a state/local government. (Calculated value)
	Column 3. Total dollar amount of all grant or scholarship aid from a state/local government awarded to FTFT DGCS students. (Reported value)
	Column 4. Average dollar amount of grant or scholarship aid from a state/local government awarded to FTFT DGCS students. (Calculated value)
	Column 5. Average dollar amount of grant and scholarship aid awarded from the state/local government awarded to FTFT DGCS students. (Prior year value)
06	Institutional grant or scholarship aid (includes fellowships, waivers, and employee exemptions) report grants, scholarships, fellowships, waivers, and employee exemptions granted and funded, or awarded by the institution and/or individual departments within the institution limited to students attending the institution. 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, and employee exemptions for which your institution was not reimbursed by a state or local entity. Include institutional grants, and the non-work-study portion of scholarships, fellowships, and waivers used to satisfy matching requirements for other programs. Do not include the work study portion of financial aid awards. Do not include grants, scholarships, fellowships, waivers, or employee exemptions passed through to the institutional from other entities if the institution does not select or designate the recipient. Do not include the federal or state matching share of financial aid awards.
	Column 1. Number of FTFT DGCS students awarded grant or scholarship aid from the institution. (Reported value) This is an unduplicated count and must be less than or equal to grant or scholarship aid from the federal government, state/local government, or the institution in Column 1, Line 01. Do not include federal grant or scholarship aid; state grant or scholarship aid; or other aid types awarded excluded above.
	Column 2. Percentage of FTFT DGCS students awarded grant or scholarship aid from the institution. (Calculated value)
	Column 3. Total dollar amount of all grants or scholarship aid from the institution awarded to FTFT DGCS students. (Reported value)
	Column 4. Average dollar amount of grant or scholarship aid from the institution awarded to FTFT DGCS students. (Calculated value)
	Column 5. Average dollar amount of grant and scholarship aid from the institution awarded to FTFT DGCS students. (Prior year value)
07	Loans to students This aid type is disaggregated into two program groups— Federal loans to students and Other loans to students (including private loans) . Report loans awarded to and accepted by the student. Include money borrowed by the student from the federal government that must be repaid. Include all Title IV federal student loan programs. Include all institutionally sponsored short-term and long-term education loans to students made by the institution or its Schools, Colleges, or student organizations. Include emergency education loans backed by a surety (i.e., financial guarantee) and Health Professions Student Loans, Loans for Disadvantaged Students, Nursing Student Loans, Primary Care Loans, and other federal loans borrowed by the student. Include private loans from lending institutions for which the student is the designated borrower. This includes Income Share Agreements and other loans certified by the institution, or known by or passed through the institution, borrowed by the student to cover the student's cost of attendance. Also include loans cosigned by a student borrower to cover the student's education costs if the student is the primary borrower legally obligated to repay to the lender.
	Exclude loans not made directly to the student such as PLUS loans or loans borrowed by others for the student on which the student is not listed as a 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.
	Column 1. Number of FTFTDGCS students awarded one or more type of loans to students. (Reported value) This is an unduplicated count. If a student was awarded a loan from more than one type listed on Line 08 and Line 09, count the student once on Line 07. This student count must be greater than or equal to the largest student count reported on Line 08 and Line 09. Include loans awarded and accepted by the student from federal and state/local government lenders, the institution, and other sources (including private lenders). Note that this number should be at least as large as the largest number reported in Line 11, Column 1 or Line 12, Column 1. In addition, this number cannot exceed the sum of [(Line 11, Column 1) + (Line 12, Column 1)].
	Column 2. Percentage of FTFT DGCS students awarded one or more loans to students. (Calculated value)
	Column 3. Total dollar amount of all loans awarded to FTFT DGCS students. (Calculated value)
	Column 4. Average dollar amount of loans to students awarded to FTFT DGCS students. (Calculated value)
	Column 5. Average dollar amount of loans awarded to FTFT DGCS students. (Prior year value)

08	Federal loans to students Report loans awarded to the student from the federal government that must be repaid by the student for which the student is the designated borrower. Includes all Title IV federal student loan aid such as Subsidized Direct Loans and Unsubsidized Direct Loans. Also include Health Professions Student Loans, Loans for Disadvantaged Students, Nursing Student Loans, Primary Care Loans, and other federal student loans. Do not include PLUS loans and other federal loans not made directly to the student (i.e., the student is not a primary borrower).
	Column 1. Number of FTFT DGCS students awarded one or more federal student loans. (Reported value) This is an unduplicated count. Count each student who received a federal student loan once on Line 08. This student count must be less than or equal to the loans to students reported in Column 1, Line 07. Do not include loans to others (e.g., PLUS loans to parents or loans for which the student is not a primary borrower) and do not include any other type of grant, scholarship, or loan aid. 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. Percentage of FTFT DGCS students awarded one or more federal student loans. (Calculated value)
	Column 3. Total dollar amount of all federal student loans awarded to FTFT DGCS students. (Reported value)
	Column 4. Average dollar amount of federal student loans awarded to FTFT DGCS students. (Calculated value)
	Column 5. Average dollar amount of federal student loans awarded and accepted by FTFT DGCS students. (Prior year value)
09	Other loans to students (including private loans). Report institutional, private, and other non-federal education loans to students. Include 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). Also include loans borrowed by the student to cover education costs that must be repaid by the student to a lender ; all institutionally and privately funded or sponsored loans such as Income Share Agreements; and all other loans certified by the institution, or known by or passed through the institution, borrowed by the student to cover the student's the cost of attendance. Included loans cosigned by a student borrower to cover the student's education costs if the student is the primary borrower legally obligated to repay to the lender. Do not include federal education loans. Exclude for which the student is not the designated borrower. Do not include loans contingent on the student's financial aid (also known as payment deferments) not backed by another source of security.
	Column 1. Number of FTFT DGCS students awarded one or more loans to students from sources other than the federal government. (Reported value) This is an unduplicated count. Count each student awarded one or more Other loans to students once on Line 09. This student count must be less than or equal to the loans to students reported in Column 1, Line 07. Do not include federal loans or loans to others (e.g., the student's parents or spouse). Do not include any other type of aid such as grants or scholarships. Do not include loans contingent on the student's financial aid (also known as payment deferments) not backed by another source of security.
	Column 2. Percentage of FTFT DGCS students awarded one or more loans Other loans to students (including private loans). (Calculated value)
	Column 3. Total dollar amount of all Other loans to students awarded to FTFT DGCS students. (Reported value)
	Column 4. Average dollar amount of Other loans to students awarded to FTFT DGCS students. (Calculated value)
	Column 5. Average dollar amount of Other loans to students awarded to FTFT DGCS students. (Prior year value)

Section 2. Military Servicemembers and Veteran Students with Benefits

Purpose of Survey Component

The purpose of this section is to collect student counts and financial assistance amounts known to the institution disbursed to undergraduate and graduate students enrolled during the 2023-24 academic year.

Detailed Instruction

This section provides line-by-line instructions for reporting Post-9/11 GI Bill benefits and Department of Defense Tuition Assistance to IPEDS.

Screening Question

Indicate whether your institution participated in the U.S. Department of Veterans Affairs Post-9/11 GI Bill or U.S. Department of Defense Military Tuition Assistance benefit programs during the 2023-24 award period. If your institution participated in either program, check yes and check which program(s) your institution participated in. Responding 'Yes' to this question means your institution will report Section 2.

What NOT to Include

Do not report the following aid types in student counts and total benefit amounts:

- Post-9/11 GI Bill Yellow Ribbon program institutional or state match,
- VA Work Study, or
- ROTC aid, which is excluded from estimated financial assistance, also known as EFA.

Reporting Reminders:

- Report student counts and total benefit amounts disbursed known to the institution for the U.S. Department Veteran's Affairs Post-9/11 GI Bill Program.
- Report student counts and disbursed amounts received and disbursed by the institution for the U.S. Department of Defense Tuition Assistance Program.
- 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.
- A student may receive benefits at the undergraduate level and the graduate level during award period.
- 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 institutional or state matching share for 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 recipients for the financial assistance program or program level.

Line	Description
Post-9/11 GI Bill Benefits for undergraduate and graduate students.	
The U.S. Department of Veterans Affairs provides up to 36 months of Post-9/11 GI Bill Benefits for tuition and fees; books and supplies; and housing for veterans who served on active duty after September 10, 2001. The tuition and fees are disbursed to the institution—passed through the institution to the student.	
Report student counts and disbursed amounts known to the institution for tuition and fees; books and supplies; and housing benefits for students enrolled during the prior 2023-24 academic year and disbursed for the July 1, 2023, to June 30, 2024, award period.	
Note: It is possible to disburse benefits to a student enrolled for the academic year at the undergraduate level and the graduate levels. If benefits were disbursed to a student at the undergraduate and graduate levels for the award period, count the student and the aid disbursed at both levels. For example, if \$500 for tuition and fees was disbursed to A student as an undergraduate student and \$800 for tuition and fees was disbursed to A student as a graduate student, (1) count The student once as an undergraduate and include the \$500 disbursed in the total dollar amount of benefits/assistance disbursed to undergraduate students and (2) count The student once as a graduate student and include the \$800 disbursed in the total dollar amount of benefits/assistance disbursed to graduate students.	
It is also possible for a student to received Post-9/11 GI Bill benefits and Department of Defense Tuition Assistance during the same academic year. If benefits were disbursed to a student for both programs during the reporting periods requested, count the student and report the aid disbursed for both programs.	
Lastly, it is possible Post-9/11 benefits for the reporting period were disbursed after the last day of the award period. Include funds disbursed after June 30, 2024, for the prior 2023-24 award period.	
Do not include Yellow Ribbon Program institutional or state match.	
01	Post-9/11 GI Bill Benefits disbursed to undergraduate students. Report Post-9/11 tuition and fees, books and supplies, and housing benefits disbursed to undergraduate students known to the institution.
	Do not include graduate students or Yellow Ribbon Program institutional or state match.
	Column 1. Unduplicated number of undergraduate students disbursed benefits through the institution. (Reported value) This is an unduplicated student count. Report the total number of undergraduate students disbursed Post-9/11 GI Bill education benefits for the award period known to the institution.
	Column 2. Total dollar amount of benefits disbursed to undergraduate students known to the institution. (Reported value)
	Column 3. Average dollar amount of benefits disbursed to undergraduate students known to the institution. (Calculated value)
	Column 4. Average dollar amount of benefits disbursed to undergraduate students known to the institution. (Prior year value)

02	Post-9/11 GI Bill Benefits disbursed to graduate student. Report Post-9/11 tuition and fee, books and supplies, and housing benefits disbursed to graduate students known to the institution.
	Do not include undergraduate students or Yellow Ribbon Program institutional or state match.
	Column 1. Unduplicated number of graduate students disbursed benefits through the institution. (Reported value) This is an unduplicated student count. Report the total number of graduate students disbursed Post-9/11 GI Bill education benefits for the award period known to the institution.
	Column 2. Total dollar amount of benefits disbursed to graduate students known to the institution. (Reported value)
	Column 3. Average dollar amount of benefits disbursed to graduate students known to the institution. (Calculated value)
03	Column 4. Average dollar amount of benefits disbursed to graduate students known to the institution. (Prior year value)
	Post-9/11 GI Benefits Program Totals.
	Column 1. Total number of undergraduate and graduate students disbursed benefits known to the institution. (Calculated value) This is the total number students at all program levels disbursed benefits/assistance. The is not an unduplicated count since a student disbursed benefits at the undergraduate and graduate levels for the same award period may be counted once at each level.
	Column 2. Total dollar amount of benefits disbursed to all students known to the institution. (Calculated value)
	Column 3. Average dollar amount of benefits disbursed to all students known to the institution. (Calculated value)
	Column 4. Average dollar amount of benefits disbursed to all students known to the institution. (Prior year value)
Department of Defense Tuition Assistance for undergraduate and graduate students. The U.S. Department of Defense's Military Tuition Assistance (TA) program is a federal program available to eligible servicemembers. It includes active-duty military, selected reserve, coast guard, and army national guard personnel and pays up to 100% of college tuition and course-specific fees for enrollment at a U.S. Department of Education accredited postsecondary institution to support voluntary off-duty professional and self-development education goals. Funds disbursed are paid directly to the institution—passed through the institution to the student. Report tuition and fee benefits for students enrolled during the prior 2023-24 academic year and disbursed for the October 1, 2023, to September 30, 2024, award period. Note: It is possible for the institution to disburse benefits to a student enrolled for the academic year at the undergraduate level and the graduate levels. If the institution disbursed benefits to a student at the undergraduate and graduate levels for the award period, count the student and the aid disbursed at both levels. For example, if \$700 for tuition and fees was disbursed to A student as an undergraduate student and \$500 for tuition and fees was disbursed to A student as a graduate student, (1) count The student once as an undergraduate and include the \$700 disbursed in the total dollar amount of benefits/assistance disbursed to undergraduate students and (2) count The student once as a graduate student and include the \$500 disbursed in the total dollar amount of benefits/assistance disbursed to graduate students. It is also possible for a student to received Department of Defense Tuition Assistance and Post-9/11 GI Bill benefits during the same academic year. If a student was disbursed benefits for both programs during the reporting periods requested, count the student and report the benefit for both programs. Lastly, it is possible for an institution to received and disburse Department of Defense Tuition Assistance for the reporting period after the last day of the award period. Include funds received and disbursed after September 30, 2024, for the prior 2023-24 award period.	
04	Department of Defense Tuition Assistance received and disbursed to undergraduate students. Report TA benefits received and disbursed to undergraduate students.
	Do not include graduate students.
	Column 1. Unduplicated number of undergraduate students who received assistance disbursed through the institution. (Reported value) This is an unduplicated student count. Report the total number of undergraduate students disbursed TA benefits for the award period.
	Column 2. Total dollar amount of assistance received and disbursed to undergraduate students through the institution. (Reported value)
	Column 3. Average dollar amount of assistance received and disbursed to undergraduate students through the institution. (Calculated value)
05	Column 4. Average dollar amount of benefits/assistance received and disbursed to undergraduate students through the institution. (Prior year value)
	Department of Defense Tuition Assistance received and disbursed to graduate student. Report TA benefits received and disbursed to graduate students.
	Do not include undergraduate students.
	Column 1. Unduplicated number of graduate students who received assistance disbursed through the institution. (Reported value) This is an unduplicated student count. Report the total number of graduate students disbursed TA benefits for the award period.
	Column 2. Total dollar amount of assistance received and disbursed to graduate students through the institution. (Reported value)
06	Column 3. Average dollar amount of assistance received and disbursed to graduate students through the institution. (Calculated value)
	Column 4. Average dollar amount of assistance received and disbursed to graduate students through the institution. (Prior year value)
	Department of Defense Tuition Assistance Totals.
	Column 1. Total number of undergraduate and graduate students who received assistance disbursed through the institution. (Calculated value) This is the total number students at all program levels disbursed assistance through the institution. The is not an unduplicated count since a student disbursed aid at the undergraduate and graduate levels for the same award period may be counted once at each level.
	Column 2. Total dollar amount of assistance received and disbursed to all students through the institution. (Calculated value)
	Column 3. Average dollar amount of assistance received and disbursed to all students through the institution. (Calculated value)
	Column 4. Average dollar amount of assistance received and disbursed to all students through the institution. (Prior year value)

Student Financial Aid FAQs 2024-25

General	
1	<u>Which institutions are required to complete the IPEDS Student Financial Aid (SFA) component?</u> All postsecondary institutions that either 1.) participated in Title IV federal student financial aid programs or 2.) were eligible to participate in Title IV federal student financial aid programs any time during the 2023-24 SFA reporting periods requested for the 2024-25 IPEDS Data Collection Cycle.
2	<u>What is the reporting period covered by SFA for the 2024-25 collection year?</u> For the 2024-25 data collection, institutions should report award or disbursement data for students enrolled during academic year 2023-24. 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 students who received benefits from July 1, 2023 to June 30, 2024 known to the institution. - The data reported for the Department of Defense Tuition Assistance Program questions should be for students for whom the institution received and disbursed benefits from October 1, 2023 to September 30, 2024.
3	<u>What changes occurred for SFA for the 2024-25 collection year?</u> The following changes were implemented for the 2024-25 data collection period: - Moved the cost of attendance and average net price data items to the new IPEDS Cost (CST) survey component. - Updated the SFA Survey form and instructions based on legislative changes, U.S. Department of Education guidance, and industry practices. - Applied the screening question from Section 2 to all institutions. - Applied the context box from Section 2 to all institutions. - Clarified loans to students reported in Section 1, Part C, Line 7 include private education loans. - Clarified Fall Enrollment (EF) student counts are carried forward and used to calculate average aid amounts and percentages for academic reporters whereas 12-Month Enrollment (E12) student counts are carried forward and used to calculate average aid amount and percentages for program reporters throughout the survey. - Eliminated the multiple forms that were historically presented on the survey materials page; however, there remain differences in how institutions report. Those differences are indicated in gold text on the single remaining form as presented to OMB. Institutions will not see the gold text and will only see the screens that are applicable to them.
4	<u>Can I revise my institutions cost of attendance (COA) data in SFA?</u> No. Beginning with the 2024-25 data collection, COA data is collected in the new IPEDS Cost (CST) survey component. See the CST Survey Instructions and Q&A for information about COA revisions.
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.
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. Do not include incarcerated students participating in U.S. Department of Education Experimental Sites projects.
Student Counts	
1	<u>For which students should I report financial aid information?</u> 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, - Degree/certificate-seeking undergraduate students, - Full-time, first-time (FTFT) degree/certificate-seeking undergraduate students , - Non-degree/certificate seeking undergraduate students , and - Undergraduate and graduate students who received certain military service and veterans' education benefits. Contact and work closely with the financial aid office and your institution's IPEDS enrollment data reporter if you have questions on how to count retroactive enrollment adjustments, retroactive financial aid award adjustments, late financial aid awards, or other administrative adjustments.

Financial Aid	
1	<u>Should veterans' education benefits be reported?</u> Report U.S. Department of Veterans Affairs Post-9/11 GI Bill and Department of Defense Tuition Assistance benefits in Section 2 of the SFA Survey if your institution participates in these programs. See Section 2 of the SFA Survey Form and the General and Detailed Instructions for more information.
2	<u>How should I report Post-9/11 GI Bill "Yellow Ribbon" benefits?</u> 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 or state part of this aid, whichever is applicable, 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 reported in Section 1 of the SFA survey component. However, both Post-9/11 GI Bill and Yellow Ribbon beneficiaries and federal dollar amounts should be reported in Section 2 of the survey component.
3	<u>The maximum amount of Department of Defense (DOD) Tuition Assistance (TA) program assistance available to service members each fiscal year per student is \$4500. What do I do if my DOD TA average is greater than \$4500 per student?</u> The DOD TA fiscal year is the same as the program award period October 1 to September 30. 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 TA average is greater than \$4500 per student per award year, then you should: 1. 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, etc.); 2. Confirm you included disbursements for the DOD TA October 1 – September 30 award period, which technically covers two fall periods. Only include disbursements – for the fall first fall for the 2023-24 academic year; and 3. Since eligibility requirements may vary from one branch of the service to another, make sure exceptions to the rules confirmed by your institution's certifying official are reported as IPEDS explanation edits, if applicable.
4	<u>What types of financial aid should be reported?</u> 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 award amounts. That is, include the federal and matching share, regardless of the source of the match. Also, FSEOG 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 and scholarships (includes educational assistance funds): Grants and scholarships provided by federal agencies such as the U.S. Department of Education. Include Title IV federal student aid program grants such as Federal Pell Grants, FSEOG, and TEACH Grants and federal grants and scholarships awarded by various Department of Health and Human Services, or HHS agencies. Also include need-based and merit-based educational assistance funds and training vouchers provided from other federal agencies and federally- sponsored educational benefits programs. Do not include veterans' education benefits, as defined in section 480(c) of the HEA of 1965 as amended. For more information, see the <i>Guidance on Federal Veterans' Education Benefits for Purposes of the Title IV Student Assistance Programs</i> Q&A posted on August 30, 2009, on the Federal Student Aid Knowledge Center website. • 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 at the institution; in community service activities on- campus or off-campus; or 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. It includes, but is not limited to, assistantships, apprenticeships, internships, externships, and cooperative education experiences. It may also include work-based fellowships. 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. 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. It includes all Title IV federal student loan aid such as Subsidized Direct Loans and Unsubsidized Direct Loans. It also includes Health Professions Student Loans, Loans for Disadvantaged Students, Nursing Student Loans, Primary Care Loans, and other federal student loans. Do not include PLUS loans and other federal loans not made directly to the student (i.e., the student is not a primary borrower). • State/local government grants and scholarships (includes fellowships, waivers, and employee exemptions): Grants, scholarships, fellowships, and waivers funded or awarded by the state/local government where the institution is located including the state matching share of Leveraging Educational Assistance Partnerships (LEAP) (formerly SSIGs), the Special Leveraging Educational Assistance Program (SLEAP), the Grants for Access and Persistence (GAP) Program, and other awards to students. Include need-based and merit-based grants or scholarships provided by a state or local government. Also include tuition and fee waivers, and employee exemptions for which your institution was reimbursed by a state or local government agency. Do not include the federal or institutional share of grant, scholarship, fellowship, waiver awards or employee exemption. Do not include federal or other pass-through funds known to the institution (i.e., funding provided to the institution by the state for students on behalf of a non-state or non-local entity). • Institutional grants and scholarships (includes fellowships, waivers, and employee exemptions): Grants, scholarships, fellowships and waivers granted and funded, or awarded by the institution and/or individual departments within the institution limited to students attending the institution. 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, and employee exemptions for which your institution was not reimbursed by a state or local government agency. Include institutional grants, and the non-work-study portion

	of scholarships, fellowships, and waivers used to satisfy matching requirements for other programs. Do not include the work study portion of awards. Do not include grants, scholarships, fellowships, waivers, and employee exemptions passed through to the institutional from other entities if the institution does not select or designate the recipient. Do not include the institutional or state matching share of Post-9/11 Yellow Ribbon tuition and fee waivers. • 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 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 also known as pass-through funds (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 such as Income Share Agreements. Do not include loans that are not made directly to the student (i.e., the student is not a 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. • 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. Some benefits may be transferred to dependents. Do not include Yellow Ribbon Program institutional or state match. • Department of Defense Military Tuition Assistance Program: A federal program available to eligible servicemembers, which includes active duty, selected reservist, coast guard, and army national guard personnel to pay up to 100% of college tuition and course-specific fees. Funds are paid directly to the institution for enrollment in a U.S. Department of Education accredited postsecondary institution to support voluntary off-duty professional and self-development education goals. • Other Sources Known to the Institution: This includes other types of aid not listed in any of the aid types defined above but not excluded in the IPEDS SFA Survey instructions. Note different parts of the SFA survey component ask institutions to report different types of financial aid. Please review the instructions and the survey screens carefully to ensure you are reporting the correct types of financial aid in the appropriate parts.
5	<u>Do I report financial aid awards for students who attend in the summer?</u> The institution may make summer awards at the beginning or the end of the academic year. Report summer financial aid student counts and award amounts during the academic year assigned by the financial aid office at your institution.
6	<u>What is the time period for which I should report financial aid amounts?</u> In general, financial aid data is reported for the prior 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. In Section 1 of the SFA Survey, institutions report financial aid awarded to students for the reporting period(s) requested enrolled during Fall 2023 for academic year reporters, and any time during the academic year 2023-24 as defined by the institution for program reporters. In Section 2 of the SFA Survey, institutions report Post-9/11 GI Bill program disbursed known to the institutions for the July 1 to June 30 award period. The reporting period Department of Defense Tuition Assistance program benefits received and disbursed through the institution is October 1 to September 30.
7	<u>Should tuition and fee waivers be reported?</u> Yes, all tuition and fee waivers should be reported except the VA, and institutional and state shares of Post-9/11 Yellow Ribbon tuition and fee waivers. Tuition and fee waivers for which your institution was reimbursed by a state/local agency should be reported as state/local government grants and scholarships. Tuition and fee waivers granted by your institution (for which your institution is not reimbursed from another source) should be reported as institutional grants and scholarships.
8	<u>Where in Part C should I report tribal aid?</u> In general financial aid funded by the federal government should be reported under the applicable federal financial aid program or program group, and financial aid funded by state/local governments, including tribes, should be reported under the applicable state/local financial aid program or program group.
9	<u>Should PLUS loans be reported?</u> 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 to IPEDS.

10	<u>What does "aid awarded" mean?</u> In the financial aid survey component, "aid awarded" refers to grant, scholarship, or loan aid awarded to students. For grant or scholarship aid, institutions should report aid awarded to students. This amount may be different from the amount 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 loans to students, institutions should report loans awarded to and accepted by the student. Institutions report Post-9/11 veterans' benefits disbursed known to the institution, and DOD Tuition Assistance benefits received and disbursed through the institutions during the reporting periods requested.
11	<u>If a student is awarded more than one type of aid, do I count him/her twice?</u> Yes, count each student once for each financial aid type in Section 1 or benefit program in Section 2. In general, aggregated amounts are unduplicated counts whereas disaggregated program and program counts may contain duplicated student counts. For example, if a student was awarded both a Federal Pell Grant and institutional aid, he/she should be counted once in Section 1, Part B, Line 01, and once in Section 1, Part B, Line 02 under both types of aid.
12	<u>The institution awards grants funded by an affiliated foundation. How should these grants be reported?</u> 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.
13	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 to IPEDS.
14	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.
15	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.

Changes for 2025-26 through 2026-27

The following changes will be implemented for the 2025-26 data collection period:

The proposed changes to the Student Financial Aid (SFA) survey component for the 2025-26 data collection aligns existing financial aid counts and aid amounts in Section 1 to collect the same data items for all undergraduate student categories and sub-categories. To accomplish this, we propose to expand the data items currently collected for all undergraduate, degree/certificate undergraduate, and non-degree/certificate undergraduate students to make them the same as the data items collected for full-time, first-time degree/certificate seeking undergraduates. This will increase the number of major financial aid program/program groups previously reported in Section 1 for these student categories from three to five but will result in net reduction in reporting burden over the next two data collections as we request more data values as they exist institutions' data systems and records, and NCES calculates aggregated values needed for publications and data tools. This will also improve data integrity and comparability since NCES calculate values are based on the same methodology for each institution type.

The proposed changes are based, in part, on National Education Postsecondary Cooperative (NPEC) research papers and Technical Review Panel (TRP) recommendations received since 2008, and IPEDS team internal discussions on how to improve the use and usability of IPEDS data by expanding the financial aid student counts and award amounts to other categories of students to help consumers make more informed postsecondary education choices. Other notable changes include the clarification of the Post-9/11 VA and Department of Defense benefit amounts reported in Section 2 of the SFA Survey and other minor grammatical edits. We also simplified Section 1 of SFA Survey Form and condensed the detailed instructions since we now collect the same data items for all categories and sub-categories of undergraduate students.

General	
Student Financial Aid Survey Form and Instructions	
SFA FAQs	Revised Financial Aid FAQ #14 to clarify beginning with the 2025-26 IPEDS data collection, Iraq and Afghanistan Service Grant (IASG) awards are included in Federal Pell Grant student counts and award amounts reported to IPEDS.
SFA Data Items	We changed Section 1 of the SFA Survey to the collect the same student counts and aid amounts for categories and sub-categories of undergraduate students. For all undergraduates, all degree/certificate seeking undergraduates, and all non-degree/certificate seeking undergraduates, we now ask institutions to report student counts and aid amounts for the following financial aid programs and program groups: - Grants or scholarships from the federal government, state/local government, or the institution; - Federal grant and scholarship aid, - Other federal grant and scholarship aid, - State/local government grant or scholarship aid (includes fellowships, waivers, and employee exemptions); - Institutional grant or scholarship aid (includes fellowships, waivers, and employee exemptions); and - Loans to students; - Other loans to students (including private loans). Student counts and aid amounts for grant or scholarship aid from other sources known to the institution, and all other percentages and average aid amounts are calculated by NCES.
Section 1, Part B	All undergraduates are reported in Section 1, Part B.
Section 1, Part C	Degree/certificate seeking undergraduates are reported in Section 1, Part C.
Section 1, Part D	Non-degree/certificate seeking undergraduates are reported in Section 1, Part D.
Section 1, Part E	Full-time, first-time degree/certificate undergraduates are reported in Section 1, Part E.
Section 2	We clarified the student counts and aid amounts reported for Department of Veteran Affairs Post-9/11 GI Bill benefits.
Survey Screens and Instructions	We made minor grammatical edits throughout the Survey Screen and Instructions for clarity.
SFA FAQs	Revised Financial Aid FAQ #14 to clarify beginning with the 2025-26 IPEDS data collection, Iraq and Afghanistan Service Grant (IASG) awards are included in Federal Pell Grant student counts and award amounts reported to IPEDS.
SFA FAQs	Revised Financial Aid FAQ #14 to clarify beginning with the 2025-26 IPEDS data collection, Iraq and Afghanistan Service Grant (IASG) awards are included in Federal Pell Grant student counts and award amounts reported to IPEDS.

Sections that vary by program participation

Some questions are not applicable to all institutions. Please see the table below for information. In the materials below, variability is indicated with [gold].

Institutions with Undergraduate and/or Graduate Students	
Student Financial Aid Survey Form	
Section 1	Applicable to all institutions with undergraduate students.
Section 2	Applicable to all institutions participating in Department of Defense Tuition Assistance or Department of Veteran Affairs Post-9/11 GI Bill benefit programs. Institutions must respond to screening question. If an institution responds year, Section 2 is then applicable.

Reporting that varies by institution

Some questions are not applicable to all institutions. Please see the table below for information. In the materials below, variability is indicated with [gold].

Institutions with Undergraduate and/or Graduate Students	
Student Financial Aid Survey Form	
Section 1, Part A	Report Fall 2024 for enrollment (Fall 2023 for prior year enrollment) EF student counts are preloaded.
Section 1, Part B	Applicable to institutions that can report all undergraduate students enrolled in Fall 2024 for the 2024-25 academic year as defined by the institution.
Section 1, Part C	Applicable to institutions that can report all degree/certificate-seeking undergraduate students enrolled in Fall 2024 for the 2024-25 academic year as defined by the institution.
Section 1, Part D	Applicable to institutions that can report all non-degree/certificate-seeking undergraduate students enrolled in Fall 2024 for the 2024-25 academic year as defined by the institution.
Section 1, Part E	Applicable to institutions that can report all full-time, first-time degree/certificate-seeking undergraduate students enrolled in Fall 2024 for the 2024-25 academic year as defined by the institution.
Section 1, Comparison Chart	Percentages and average aid amounts based on Fall Enrollment—EF student counts
Program Reporters	
Section 1, Part A	Report July 1, 2024 to June 30, 2025 for enrollment (July 1, 2023 to June 30, 2024 for prior year enrollment) E12 student counts are preloaded
Section 1, Part B	Applicable to institutions that can report all undergraduate students enrolled anytime during the academic period from July 1, 2024 – June 30, 2025
Section 1, Part C	Applicable to institutions that can report all degree/certificate-seeking undergraduate students enrolled anytime during the academic period from July 1, 2024 – June 30, 2025
Section 1, Part D	Applicable to institutions that can report all non-degree/certificate-seeking undergraduate students enrolled anytime during the academic period from July 1, 2024 – June 30, 2025
Section 1, Part E	Applicable to institutions that can report all full-time, first-time degree/certificate-seeking undergraduate students enrolled anytime during the academic period from July 1, 2024 – June 30, 2025
Section 1, Comparison Chart	Percentages and average aid amounts based on 12-Month Enrollment—E12 student counts

Parts that vary by reporter type

Some questions are not applicable to all institutions. Please see the table below for information. In the materials below, variability is indicated with [gold].

Data reporting type abbreviations

Throughout these forms, the type of data reported or provided in each field is indicated with an abbreviation. The table below provides information about these abbreviations.

CF	Carried forward. Values are carried forward from other parts of the survey form.
CV	Calculated value. IPEDS calculates the information based on the data provided.
PL	Preloaded value. IPEDS preloads the information for the institution (when available).
PY	Prior year value. IPEDS preloads the information for the institution (when available).
RB	Radio button option. Only one of the options can be selected.
RV	Reported value. All reported values in IPEDS are numerical.

Other SFA specific abbreviations

Throughout these forms, the type of data reported or provided in each field is indicated with an abbreviation. The table below provides information about these abbreviations.

AR	Academic Reporter
PR	Program Reporter

Student Financial Aid Screens 2025-26 through 2026-27

Overview

IPEDS Student Financial Aid Component Overview

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

Data Reporting Reminders:

- Report data to accurately reflect the period(s) corresponding with the IPEDS survey component requested, even if such reporting seems inconsistent with prior-year reporting.
- Undergraduate Student Counts
You will be asked to report information for:
 - o All undergraduate students
 - Degree/certificate-seeking undergraduate students
 - Full-time, first-time degree/certificate-seeking undergraduate students (FTFT)
 - Non-degree/certificate-seeking undergraduate students
- Interactive Edits and Error Messages
The SFA survey component contains interactive edits to check for blank fields, invalid values, or values outside expected ranges. Some error messages require you to confirm or explain the values entered whereas other error messages are fatal and require you to contact the IPEDS Help Desk at (877) 225-2568 for resolution.
- Context Boxes
You will find optional text boxes throughout the SFA survey component. These text boxes allow you to provide more information or context about the data entered. Some context boxes may be made available to the public on College Navigator, so make sure the information you enter can be understood easily by students, parents, and the public.

Changes in reporting:

The following changes were implemented for the 2025-26 data collection period:

- Changed Section 1 of the SFA Survey to collect the same student counts and aid amounts for categories and sub-categories of undergraduate students.
 - o What was previously Part B, which included all undergraduates, all degree/certificate-seeking undergraduates, and all non-degree/certificate-seeking undergraduates has been split into 3 parts – Part B (All undergraduates), Part C (All degree/certificate-seeking undergraduates), and Part D (All non-degree/certificate-seeking undergraduates)
 - Additional aid types have been added for these categories to align with data collected for FTFT non-degree/certificate-seeking undergraduates
 - o What was previously Part C is now Part E, which includes all First-time, full-time degree/certificate-seeking undergraduates
 - Additional aid types have been added for these categories to align with data collected for the other student categories in Parts B-D
- Clarified instructions that institutions need to include Iraq and Afghanistan Service Grant (IASG) awards in Federal Pell Grant student counts and award amounts reported to IPEDS due to a change mandated under the Fostering Undergraduate Talent by Unlocking Resources (FUTURE) Act.
- Clarified what benefits need to be included in Section 2 of the survey component
 - o Institutions should report Department of Veteran Affairs' Post-9/11 GI Bill tuition and fee, books and supplies, and housing benefits disbursed known to the institution in Section 2 of the SFA Survey.
- Clarified that institutions need to report the federal share of Department of Veteran Affairs' Yellow Ribbon benefits disbursed known to the institution in Section 2 of the SFA Survey.
- Revised FAQs and made other minor edits for clarity.

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 1 - Student Financial Aid - Undergraduate Students

Part A - Establish Your Student Counts

Instructions:

In the fields below, report student counts for the reporting period requested for each student category and financial aid type. Reporting period loaded based on reporter type: Academic Reporter (AR) OR Program Reporter (PR). Section 1 is applicable to institutions offering undergraduate programs, as determined by the following items in IC Header (ICH):

- Q3, award level = 1a, 1b, 2, 3, 4, 5, and 6; or
- Q5, Undergraduate (undergraduate or occupational programs), full-time or part-time = Yes; or
- First-time degree/certificate seeking undergraduate, Full-time or Part-time = Yes.

Reporting Reminders:

- Part A establishes student counts.
- The numbers on this screen are carried forward to other parts of the Student Financial Aid component and checked for consistency with data reported in other survey components.

STUDENT COUNTS			YOUR CURRENT YEAR DATA	YOUR PRIOR YEAR DATA
			AR: Fall 2023 PR: July 1, 2023 to June 30, 2024	AR: Fall 2022 PR: July 1, 2022 to June 30, 2023
02	All <u>undergraduate</u> students		Editable PL [EF or E12]	PY
03	All degree/certificate-seeking undergraduate students Of those on line 02, those who are degree/certificate-seeking		Editable PL [EF or E12]	PY
04	Of those on line 02, those who are non-degree/certificate-seeking (Line 02 – Line 03)		Editable CV	PY
05	All full-time, first-time degree certificate-seeking undergraduate students Of those on Line 03, those who are full-time, first-time		Editable PL [EF or E12]	PY
06	Of those on Line 05, those awarded any: O <u>Federal Work Study</u> , O <u>Loans to students</u> , O Grant or scholarship aid from the federal government, state/local government, or the institution, or O Other sources known to the institution		RV	PY
07	Of those on Line 05, those awarded any: O <u>Loans to students</u> or O Grant or scholarship aid from the federal government, state/local government, or the institution.		RV	PY

Section 1 – Student Financial Aid – Undergraduate Students

This screen is the same for parts B, C, and D. The only change is the category of students that is reported.

- Part B – All undergraduate students
- Part C – All degree/certificate-seeking undergraduate students
- Part D – All non-degree/certificate-seeking undergraduate students

Parts B, C, and D – Enter Student Counts and Financial Aid Award Amounts for [UGS, DGCS, or NDGCS] – Page 1

Instructions:

In the fields below, report student counts and the total financial aid amount awarded for each student category and financial aid type for the reporting period requested. Enter unduplicated student counts within each aid type (e.g., Federal Pell Grants). However, a student can appear in more than one financial aid program group. [Reporting period loaded based on reporter type: Academic Reporter (AR) OR Program Reporter (PR)].

Reporting Reminders:

- Reported values must be consistent with the Information from Part A carried forward to this screen.
- Report students awarded Federal Pell Grant enrolled in post-baccalaureate teacher certification or licensure programs, or courses required by a state to obtain certification to teach the state as undergraduate students.
- Report all other students, including students with intellectual disabilities enrolled in a U.S. Department of Education approved comprehensive transition and postsecondary (CTP) program, at the degree/certificate program level assigned by the institution.
- If students are not admitted and enrolled as degree/certificate seeking taking prerequisites (preparatory courses) offered as part of a Title IV eligible program to satisfy entrance requirements for a Title IV eligible program at your institution or another institution, report them as non-degree/certificate seeking undergraduates.

For this part, report:

For These Students	The Following Type(s) of Aid	Awarded in This Period
[AR: All undergraduate students enrolled in Fall 2024 for the 2024-25 academic year as defined by the institution] [PR: All undergraduate students enrolled anytime during the academic year as defined by the institution, which is typically from July 1, 2024 – June 30, 2025]	- Grant or scholarship aid from: - o federal government - o state/local government - o the institution - o other sources known to the institution - Loans to students from: - o the federal government - o other sources known to the institution, including private and institutional loans - Do not include: - o grant or scholarship aid from private or other sources - o PLUS loans or loans made to anyone other than the student	Any time during academic year 2024-25
Information from Part A		[AR: Fall 2024 PR: July 1, 2024 – June 30, 2025]
All [UGS, DGCS, or NDGCS] (This number is carried forward from Part A, Line [02, 03, or 04])		CF

Part B - Enter Student Counts and Financial Aid Amounts for All [UGS, DGCS, or NDGCS] - Page 2

Aid Type		All [UGS, DGCS, or NDGCS] from Part A, Line [02, 03, or 04]				YOUR PRIOR YEAR DATA
		CURRENT YEAR DATA				
		[AR: Fall 2024 PR: July 1, 2024 to June 30, 2025]				[AR: Fall 2024 PR: July 1, 2023 to June 30, 2024]
		Number of undergraduate students awarded aid	Percentage of undergraduate students awarded aid	Total aid amount awarded to undergraduate students	Average aid amount awarded to undergraduate students	Average aid amount awarded to undergraduate students
		Col. 1	Col. 2	Col. 3	Col. 4	Col. 5
01	Grant or scholarship aid from the federal government, state/local government, the institution, and other sources known to the institution (Do NOT include student loans)	RV	CV	RV	CV	PY (when available)
01a	Grants or scholarships from the federal government, state/local government, or the institution (Do NOT include student loans)	RV	CV	RV	CV	PY (when available)
01b	Grant or scholarship aid from other sources known to the institution (Do NOT include student loans)	CV	CV	CV	CV	PY (when available)
02	<u>Federal grant and scholarship aid</u>	RV	CV	CV	CV	PY (when available)
- 02a	<u>Federal Pell Grants</u>	RV	CV	RV	CV	PY (when available)
02b	<u>Other federal grant and scholarship aid</u>	RV	CV	RV	CV	PY (when available)
03	<u>State/local government grant or scholarship aid</u> (includes <u>fellowships</u> , waivers, and employee exemptions)	RV	CV	RV	CV	PY (when available)
04	<u>Institutional grant or scholarship aid</u> (includes <u>fellowships</u> , waivers, and employee exemptions)	RV	CV	RV	CV	PY (when available)
05	<u>Loans to students</u>	RV	CV	CV	CV	PY (when available)
05a	Federal loans to students	RV	CV	RV	CV	PY (when available)
05b	Other loans to students (including private loans)	RV	CV	RV	CV	PY (when available)

You may use the box below to provide additional context for the data you have reported above. Context notes will be posted on the College Navigator website. 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).

OPEN CONTEXT BOX

Section 1 - Student Financial Aid - Full-Time, First-Time Undergraduate Students

Part E - Enter Information about full-time, first-time degree/certificate-seeking undergraduate students

Instructions:

In the fields below, report student counts and the total financial aid amount awarded for full-time, first-time degree/certificate seeking undergraduates only for each financial aid type. Enter unduplicated student counts within each aid category (e.g., Federal Pell Grants). However, a student can appear in more than one financial aid program group. **Reporting period loaded based on reporter type: Academic Reporter (AR) OR Program Reporter (PR).**

Reporting Reminders:

- Reported values must be consistent with the Information from Part A carried forward to this screen.
- Report all other students, including students with intellectual disabilities enrolled in a U.S. Department of Education approved comprehensive transition and postsecondary (CTP) program, at the degree/certificate program level assigned by the institution.

For this part, report:

For These Students	The Following Type(s) of Aid	Awarded in This Period
[AR: Full-time, first-time degree/certificate-seeking undergraduate students enrolled in Fall 2024 for the 2024-25 academic year as defined by the institution] [PR: Full-time, first-time degree/certificate-seeking undergraduate students enrolled anytime during the academic year as defined by the institution that falls within July 1, 2024 – June 30, 2025]	- Grant or scholarship aid from: - o federal government - o state/local government - o the institution - o other sources known to the institution - Loans to students from: - o the federal government - o other sources, including private and institutional loans - Do not include: - o grant or scholarship aid from private or other sources - o PLUS loans or loans made to anyone other than the student	o Any time during academic year 2024-25
Information from Part A		[AR: Fall 2024 PR: July 1, 2024 to June 30, 2025]
Full-time, first-time degree/certificate-seeking undergraduate students (This number is carried forward from Part A, Line 05)		CF
(This number is carried forward from Part A, Line 06) Full-time, first-time degree/certificate-seeking undergraduate students awarded: - o Federal Work Study - o Loans to students - o Grant or scholarship aid from the federal government, state/local government, or the institution - o Other sources known to the institution		CF
(This number is carried forward from Part A, Line 07) Full-time, first-time degree/certificate-seeking undergraduate students awarded: - o Loans to students - o Grant or scholarship aid from the federal government, state/local government, or the institution		CF

Aid Type		FULL-TIME, FIRST-TIME UNDERGRADUATES from Part A, Line 05				
		CURRENT YEAR DATA				YOUR PRIOR YEAR DATA
		[AR: Fall 2024 PR: July 1, 2024 to June 30, 2025]				[AR: Fall 2023 PR: July 1, 2023 to June 30, 2024]
		Number of FTFT students awarded aid	Percentage of FTFT students awarded aid	Total amount of aid awarded to FTFT students	Average amount of aid awarded to FTFT students	Average amount of aid awarded to FTFT students
		Col. 1	Col. 2	Col. 3	Col. 4	Col. 5
01	Grant or scholarship aid from the federal government, state/local government, the institution, and other sources known to the institution (Do NOT include student loans)	RV	CV	RV	CV	PY (when available)
01a	Grants or scholarships from the federal government, state/local government, or the institution (Do NOT include student loans)	RV	CV	RV	CV	PY (when available)
01b	Grant or scholarship aid from other sources known to the institution (Do NOT include student loans)	CV	CV	CV	CV	PY (when available)
02	<u>Federal grant and scholarship aid</u>	RV	CV	CV	CV	PY (when available)
02a	<u>Federal Pell Grants</u>	RV	CV	RV	CV	PY (when available)
02b	<u>Other federal grant and scholarship aid</u>	RV	CV	RV	CV	PY (when available)
03	<u>State/local government grant</u> or <u>scholarship aid</u> (includes <u>fellowships</u> , waivers, and employee exemptions)	RV	CV	RV	CV	PY (when available)
04	<u>Institutional grant</u> or <u>scholarship aid</u> (includes <u>fellowships</u> , waivers, and employee exemptions)	RV	CV	RV	CV	PY (when available)
05	<u>Loans to students</u>	RV	CV	CV	CV	PY (when available)
05a	Federal loans to students	RV	CV	RV	CV	PY (when available)
05b	Other loans to students (including private loans)	RV	CV	RV	CV	PY (when available)

Section 1 : Comparison Chart

Summary Data by Student Category and Financial Aid Type

Instructions for use:

- The SFA Comparison Chart provides a summary of the data reported in Section 1 of the survey. Summary data is based on the preloaded data and information reported on the previous screens in this section for all undergraduate students and full-time, first-time degree/certificate-seeking undergraduate students.
 - Values displayed for *All undergraduate students*, *All degree/certificate seeking undergraduate students*, and *All non-degree/certificate seeking undergraduate students* should match the values reported in Section 1, Part B;
 - Values displayed for *Full-time, First-time degree/certificate seeking undergraduate students* should match the values reported in Section 1, Part C; and
 - NCES calculated values for the student count and total amount of aid awarded for *All other degree/certificate seeking undergraduate students* should be the difference between the values reported for *All undergraduate students* and *Full-time, first-time degree/certificate seeking undergraduate students*.
- If values displayed do not match your institution's calculations, please correct the numbers reported before moving forward to complete Section 2 of the SFA Survey.
- Data for all degree/certificate seeking undergraduate students and full-time, first-time degree/certificate undergraduate students are published on College Navigator.

Note: Data for all other degree/certificate undergraduate students and all non-degree/certificate undergraduate students will appear in the IPEDS Data Center for data users, but not in College Navigator.

		[AR: 2024-25 PR: July 1, 2024 to June 30, 2025]	Academic year 2024 – 25	Academic year 2024 – 25
Student Categories		Number of students	Federal Pell Grants	Federal Student Loans
		Col. 1	Col.2	Col. 3
01	All undergraduates	CF [Part A, Line 02]		
01a	Number of students awarded aid		CF [Part B, Col. 01, Line 02]	CF [Part B, Col. 01, Line 03]
01b	Percentage awarded aid		CF [Part B, Col. 02, Line 02]	CF [Part B, Col. 02, Line 03]
01c	Total amount of aid awarded		CF [Part B, Col. 03, Line 02]	CF [Part B, Col. 03, Line 03]
01d	Average amount of aid awarded		CF [Part B, Col. 04, Line 02]	CF [Part B, Col. 04, Line 03]
02	All degree/certificate seeking undergraduate students	CF [Part A, Line 03]		
02a	Number of students awarded aid		CF [Part B, Col. 05, Line 02]	CF [Part B, Col. 05, Line 03]
02b	Percentage awarded aid		CF [Part B, Col. 06, Line 02]	CF [Part B, Col. 06, Line 03]
02c	Total amount of aid awarded		CF [Part B, Col. 07, Line 02]	CF [Part B, Col. 07, Line 03]
02d	Average amount of aid awarded		CF [Part B, Col. 08, Line 02]	CF [Part B, Col. 08, Line 03]
03	Full-time, first-time degree/certificate seeking undergraduate students	CF [Part A, Line 05]		
03a	Number of students awarded aid		CF [Part C, Col. 01, Line 03]	CF [Part C, Col. 01, Line 08]
03b	Percentage awarded aid		CF [Part C, Col. 02, Line 03]	CF [Part C, Col. 02, Line 08]
03c	Total amount of aid awarded		CF [Part C, Col. 03, Line 03]	CF [Part C, Col. 03, Line 08]
03d	Average amount of aid awarded		CF [Part C, Col. 04, Line 03]	CF [Part C, Col. 04, Line 08]
04	All other degree/certificate seeking undergraduate students	CV [Line 02–Line 03]		
04a	Number of students awarded aid		CV [Col.2, Line 02a–Line 03a]	CV [Col.3, Line 02a–Line 03a]
04b	Percentage awarded aid		CV [Col.2, Line 04a/Col.1, Line 04]	CV [Col.3, Line 04a/Col.1, Line 04]
04c	Total amount of aid awarded		CV [Col.2, Line 02c–Line 03c]	CV [Col.3, Line 02c–Line 03c]
04d	Average amount of aid awarded		CV [Col.2, Line 04c/Col.2, Line 04a]	CV [Col.3, Line 04c/Col.3, Line 04a]
05	All non-degree/certificate-seeking undergraduate students	CF [Part A, Line 04]		
05a	Number of students awarded aid		CF [Part B, Col. 09, Line 02]	CF [Part B, Col. 09, Line 03]
05b	Percentage awarded aid		CF [Part B, Col. 10, Line 02]	CF [Part B, Col. 10, Line 03]
05c	Total amount of aid awarded		CF [Part B, Col. 11, Line 02]	CF [Part B, Col. 11, Line 03]
05d	Average amount of aid awarded		CF [Part B, Col. 12, Line 02]	CF [Part B, Col. 12, Line 03]

Section 2 – Military Servicemembers’ and Veterans’ Benefits - Undergraduate and Graduate Students [Section 2 applicable to all institutions]

Section 2: Screening Question

1. Did your institution participate in the U.S. Department of Veterans Affairs Post-9/11 GI Bill or U.S. Department of Defense Military Tuition Assistance benefit programs during the 2023-24 award period? (You are required to complete Section 2 of the SFA Survey if you answer “Yes” to this screening question.)		
Radio button option	No	
Radio button option	Yes, please check programs all available to students at your institution.	
	Checkbox option	U.S. Department of Veterans Affairs Post-9/11 GI Bill
	Checkbox option	U.S. Department of Defense Military Tuition Assistance

Instructions:

Report student counts and the total benefit amounts for undergraduate and graduate students. Report:

- Post-9/11 GI Bill Benefits for: [July 1, 2024 - June 30, 2025](#)
- Department of Defense Tuition Assistance Program for: [October 1, 2024 - September 30, 2025](#)
- Information for **ALL programs** offered by the institution.

Reporting Reminders:

- Report student counts and total benefit amounts disbursed known to the institution for the U.S. Department of Veteran's Affairs Post-9/11 GI Bill Program.
- Report student counts and disbursed amounts received and disbursed by the institution for the U.S. Department of Defense Tuition Assistance Program.
- 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.
- A student may receive benefits at the undergraduate level and the graduate level during award period.
- 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 institutional or state matching share for 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 recipients for the financial assistance program or program level.

U.S. Department of Veterans Affairs Post-9/11 GI-Bill Benefits

Type of benefit/assistance	YOUR CURRENT YEAR DATA			YOUR PRIOR YEAR DATA
	Number of students disbursed benefits/assistance known to the institution Col. 1	Total dollar amount of benefits/assistance disbursed known to institution Col. 2	Average dollar amount of benefits/assistance disbursed known to institution Col. 3	Average dollar amount of benefits/assistance disbursed known to institution Col. 4
<u>Post-9/11 GI Bill Benefits</u>				
01 Undergraduate students	RV	RV	CV[Col. 2/ Col. 1]	PY
02 Graduate students	RV	RV	CV[Col. 2/ Col. 1]	PY
03 Total	CV[Line 01+Line 02]	CV[Line 01+Line 02]	CV[Col. 2/ Col. 1]	PY

U.S. Department of Defense Tuition Assistance Program

Type of benefit/assistance	YOUR CURRENT YEAR DATA			YOUR PRIOR YEAR DATA
	Number of students who received benefits/assistance disbursed through the institution Col. 1	Total dollar amount of benefits/assistance received and disbursed through the institution Col. 2	Average dollar amount of benefits/assistance received and disbursed through the institution Col. 3	Average dollar amount of benefits/assistance received and disbursed through the institution Col. 4
<u>Department of Defense Tuition Assistance Program</u>				
04 Undergraduate students	RV	RV	CV[Col. 2/ Col. 1]	PY
05 Graduate students	RV	RV	CV[Col. 2/ Col. 1]	PY
06 Total	CV[Line 04+Line05]	CV[Line 04+Line05]	CV[Col. 2/ Col. 1]	PY

You may use the box below to provide additional context for the data you have reported above. Context notes will be posted on the College Navigator website. Therefore, you should write all context notes using proper grammar (e.g., complete sentences with punctuation) and common language easily understood by students and parents (e.g., spell out acronyms).

OPEN CONTEXT BOX

Student Financial Aid Instructions - Student Financial Aid Screens 2025-26 through 2026-27

Overview

Table of Contents

The Student Financial Aid (SFA) survey component is divided into two sections. Section 1 collects data for undergraduate students only. Section 2 collects data for undergraduate and graduate 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.

Data Collection Information

Here you will find links to:

- Information on IPEDS data reporting and data uses;
- The data collection schedule and survey materials;
- Current and archived survey changes; and

- Current announcements.

IPEDS Survey Components

Here you will find:

- Information on each IPEDS survey component, which includes job aids and FAQs, and
- A link to the IPEDS Survey Methodology.

Reporting Guides and Reporting Tools

Here you will find reporting guides such as glossaries, handbooks, instructions, and software provider resources. Reporting tools include links to IPEDS tutorials; the IPEDS Survey Components and Data Collection Cycle reporting tool, reporting tips, FAQs, and other reporting tools.

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

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

Purpose of Survey Component

The purpose of the IPEDS Student Financial Aid (SFA) survey component is to collect information about financial aid provided to various categories and sub-categories of undergraduate and graduate students at your institution to meet requirements of the:

- Higher Education Act of 1965 (HEA), as amended,
- Executive Order No. 13607, Establishing Principles of Excellence for Educational Institutions Serving Service Members, Veterans, Spouses, and Other Family Members, and
- 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. Continuous improvement efforts at each agency have led to refined and expanded consumer information that student and families may use to make informed postsecondary education decisions.

Student counts and dollar amounts are collected for:

- All undergraduate students,
- Degree/certificate-seeking undergraduate students,
- Full-time, first-time (FTFT) degree/certificate-seeking undergraduate students,
- Non-degree/certificate-seeking undergraduate students, and
- Undergraduate and graduate students who received certain military service and/or veterans education benefits.

Changes in reporting:

The following changes were implemented for the 2025-26 data collection period:

- Changed Section 1 of the SFA Survey to the collect the same student counts and aid amounts for categories and sub-categories of undergraduate students.
 - What was previously Part B, which included all undergraduates, all degree/certificate-seeking undergraduates, and all non-degree/certificate-seeking undergraduates has been split into 3 parts – Part B (All undergraduates), Part C (All degree/certificate-seeking undergraduates), and Part D (All non-degree/certificate-seeking undergraduates)
 - Additional aid types have been added for these categories to align with data collected for FTFT non-degree/certificate-seeking undergraduates
 - What was previously Part C is now Part E, which includes all First-time, full-time degree/certificate-seeking undergraduates
 - Additional aid types have been added for these categories to align with data collected for the other student categories in Parts B-D
- Clarified instructions that institutions need to include Iraq and Afghanistan Service Grant (IASG) awards in Federal Pell Grant student counts and award amounts reported to IPEDS due to a change mandated under the Fostering Undergraduate Talent by Unlocking Resources (FUTURE) Act.
- Clarified what benefits need to be included in Section 2 of the survey component
 - Institutions should report Department of Veteran Affairs' Post-9/11 GI Bill tuition and fee, books and supplies, and housing benefits disbursed known to the institution in Section 2 of the SFA Survey.
- Clarified that institutions need to report the federal share of Department of Veteran Affairs' Yellow Ribbon benefits disbursed known to the institution in Section 2 of the SFA Survey.
- Revised FAQs and made other minor edits for clarity.

Section 1. SFA - Undergraduate Students

General Instructions

Report students in the categories and sub-categories described enrolled during the period(s) requested who received the types of aid as defined for IPEDS reporting purposes.

Who Must Report

All institutions participating or eligible to participate in Title IV financial aid programs and had students enrolled during the prior academic year must report data to IPEDS. Non-Title IV institutions may and are strongly encouraged but are not required to submit data.

Data Reporting Reminders:

- Report data to accurately reflect the period(s) corresponding with the IPEDS survey component requested, even if such reporting seems inconsistent with prior-year reporting.
- Report financial aid programs under the correct funding source (i.e., federal, state, or local government, the institution, private entity, etc.).
- Contact the financial aid office if you are not sure where to report matching funds or financial aid received by the institution for the student.
- If there are no students in a category or sub-category, enter zero (0). Do NOT leave the cell blank.
- Report student counts and total benefit amounts disbursed known to the institution for the U.S. Department of Veterans Affairs Post-9/11 GI Bill Program.
- Report student counts and disbursed amounts received and disbursed by the institution for the U.S. Department of Defense Tuition Assistance Program.
- Report unduplicated student counts for each aid type.
- 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 or state aid provided through the Yellow Ribbon Program if your school participated.

NOTE: In Section 2 of the SFA survey component, all institutions, including program reporters, should report information for ALL programs (not just the largest program).

What You Will Need

The institution's financial aid system should be the starting point for reporting to the IPEDS SFA survey component. Data providers should also be familiar with college and university practices associated with student financial aid and other financial assistance benefits.

In general, there are three types of financial aid data that will be requested in this component. These types are:

- Student counts by financial aid type and student categories;
- Total financial aid dollars awarded to these students, and
- Total military and veterans' education benefits dollars disbursed to students known to the institution.

To complete Section 1 of this survey component, data providers will need student counts and financial aid award amounts for:

- All undergraduate students,
- Degree/certificate-seeking undergraduate students,
- Full-time, first-time degree/certificate-seeking undergraduate students, and
- Non-degree/certificate-seeking undergraduate students.

To complete Section 2 of this survey component, you will need student counts, and military tuition assistance and Post-9/11 benefit disbursed amounts for:

- Undergraduate students, and
- Graduate students.

If you are not familiar with these educational benefits, a general synopsis of each program is provided below.

U.S. Department of Veterans Affairs Post-9/11 GI Bill program

- Effective August 1, 2009, includes payment of tuition and fees, a monthly housing allowance, and a books and supplies stipend.
- Tuition and fees are paid directly to the institution on behalf of students and data on materials, books, supplies, and housing amounts is available to the institution; thus, institutions should know which students have Post-9/11 GI Bill benefits and the benefit amounts.
- Educational benefits can be transferred to eligible dependents.
- Program expanded in 2011 to cover non-degree-granting programs, apprenticeships/on-the-job training programs, flight training programs, and training correspondence.
- The Post-9/11 GI Bill Yellow Ribbon program is an institutional aid matching program which covers tuition and fees for students attending participating institutions only.

For information on additional program benefits, see *How can I use my Post-9/11 GI Bill (Chapter 33) benefits?* at <https://www.va.gov/education/about-gi-bill-benefits/post-9-11/>.

U.S. Department of Defense (DOD) Tuition Assistance Program

- Available to active duty servicemembers, reservists called to active duty, and their spouses.
- Includes the U.S. National Guard and the U.S. Coast Guard.
- Eligibility criteria may vary by branch of service.
- 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 visit <https://www.dantes.mil/mil-ta/> for specific information for each U.S. military service branch.

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

Several types of data appear in the SFA Survey component. It includes data values:

- Provided based on the institution's financial aid records,
- Provided in prior years displayed for comparison with current year data (i.e., the data being reported),
- Carried forward from the IPEDS Fall Enrollment (EF) survey completed during the most recent EF data collection (Academic year reporters),
- Carried forward from the IPEDS 12-Month Enrollment (E12) survey completed during the most recent E12 data collection (Program reporters),
- Carried forward from one part of the Student Financial Aid survey to another part to ensure internal data consistency, and
- Calculated by NCES from reported data values.

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.

Federal, state/local government, institutional, and private grants, scholarships, and loan aid are collected in Section 1 of the SFA Survey. This includes data for all Title IV programs except Federal Work Study awards and earnings.

The Post-9/11 GI Bill and Tuition Assistance programs highlight two of many educational benefits provided to military servicemembers, veterans, and eligible dependents. However, from a national perspective, Post-9/11 GI Bill and Tuition Assistance programs are more likely to be found across over 6,000 IPEDS institutions. Data on these programs is collected in Section 2 of the SFA Survey.

Data reporters should work closely with data providers, the institution's data owners and state and system data collection coordinators to confirm data values carried forward and calculated are consistent with the data in the institution's records. If the data carried forward or calculated are not consistent with the institution's records, then a data item change or 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 so that 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.

Coverage

Reporting Period

The financial aid data reported for this survey component should be for the prior academic year as defined by the institution, including cross-over financial aid award periods assigned to the prior academic year. Contact your institution's financial aid office if you have questions about cross-over award periods.

Note U.S. Department of Veterans Affairs Post-9/11 GI Bill program benefits and U.S. Department of Defense Tuition Assistance benefits are reported to IPEDS for different time periods. The reporting period for Post-9/11 GI Bill program benefits is July 1 to June 30. The reporting period Department of Defense Tuition Assistance program benefits is October 1 to September 30.

Student Cohort

Section 1: For academic reporters, the student cohort covered by the SFA survey component includes undergraduate students enrolled for the prior academic year as of October 15 or as of the institution's official fall reporting date. For program reporters, the student cohort covered by this survey component includes undergraduate students enrolled any time during the academic period from **July 1, 2023 – June 30, 2024**. For hybrid reporters, the student cohort covered includes undergraduate students enrolled in the prior academic year between August 1 and October 31.

Section 2: For all institutions, the student cohort covered by this section of the SFA Survey includes all undergraduate and graduate students enrolled any time during the prior academic year disbursed benefits for the award period known to the institution.

What to Include

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. Report 100% of student FSEOG award amounts. That is, include the federal and matching share, regardless of the source of the match. Also, FSEOG 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 and scholarships (including educational assistance funds):** Grants and scholarships provided by federal agencies such as the U.S. Department of Education. Include Title IV federal student aid program grants such as Federal Pell Grants, FSEOG, and TEACH Grants and federal grants and scholarships awarded by various Department of Health and Human Services (HHS) agencies. Also include need-based and merit-based educational assistance funds and training vouchers provided from other federal agencies and federally-sponsored educational benefits programs.

Do not include veterans' education benefits, as defined in section 480(c) of the HEA of 1965 as amended. For more information, see the *Guidance on Federal Veterans' Education Benefits for Purposes of the Title IV Student Assistance Programs* Q&A posted on August 30, 2009, on the Federal Student Aid Knowledge Center website.

- **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 at the institution; in community service activities on-campus or off-campus; or 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. It includes, but is not limited to, assistantships, apprenticeships, internships, externships, and cooperative education experiences. It may also

include work-based fellowships. 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. 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. It includes all Title IV federal student loan aid such as Subsidized Direct Loans and Unsubsidized Direct Loans. It also includes Health Professions Student Loans, Loans for Disadvantaged Students, Nursing Student Loans, Primary Care Loans, and other federal student loans. Do not include PLUS loans and other federal loans not made directly to the student.
- **State/local government grants and scholarships (includes fellowships, waivers, and employee exemptions):** Grants, scholarships, fellowships, and waivers funded or awarded by the state/local government **where the institution is located including the state matching share** of Leveraging Educational Assistance Partnerships (LEAP) (formerly SSIGs), the Special Leveraging Educational Assistance Program (SLEAP), the Grants for Access and Persistence (GAP) Program, and other awards to students. Include need-based and merit-based grants or scholarships provided by a state or local government. Also include tuition and fee waivers, and employee exemptions for which your institution was reimbursed by a state or local government agency. Do not include the federal or institutional share of grant, scholarship, fellowship, waiver awards or employee exemption. Do not include federal or other pass-through funds known to the institution (i.e., funding provided to the institution by the state for students on behalf of a non-state or non-local entity).
- **Institutional grants and scholarships (including fellowships, waivers, and employee exemptions):** Grants, scholarships, fellowships and waivers granted and funded, or awarded by the institution and/or individual departments within the institution limited to students attending the institution. 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, and employee exemptions for which your institution was not reimbursed by a state or local government agency. Include institutional grants, and the non-work-study portion of scholarships, fellowships, and waivers used to satisfy matching requirements for other programs. Do not include the work study portion of awards. Do not include grants, scholarships, fellowships, waivers, and employee exemptions passed through to the institution from other entities if the institution does not select or designate the recipient. Do not include the institutional or state matching share of Post-9/11 Yellow Ribbon tuition and fee waivers.
- **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 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 also known as pass-through funds (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 such as Income Share Agreements. Do not include loans that are not made directly to the student (i.e., the student is not a 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.
- **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, supplies, and housing are sent directly to the student. Some benefits may be transferred to dependents. Do not include Yellow Ribbon Program institutional or state match.
- **Department of Defense Military Tuition Assistance Program:** A federal program available to eligible servicemembers, which includes active duty, selected reservist, coast guard, and army national guard personnel to pay up to 100% of college tuition and course-specific fees. Funds are paid directly to the institution for enrollment in a U.S. Department of Education accredited postsecondary institution to support voluntary off-duty professional and self-development education goals.
- **Other Sources Known to the Institution:** This includes other types of aid not listed in any of the aid types defined above but not excluded in the SFA survey component instructions.

NOTE: In this component, "aid awarded" refers to grant, scholarship, or loan aid awarded to students. For grant or scholarship aid, institutions should report aid awarded to students. This amount may be different from the amount 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 loans to students, institutions should report loans awarded to and accepted by the student. Institutions report Post-9/11 veterans' benefits **disbursed** known to the institution, and DOD Tuition Assistance benefits **received and disbursed through the institutions** during the reporting periods requested.

Institutions report different financial aid types for undergraduate and graduate students on the SFA Survey. Please read the instructions carefully on each screen to identify the enrollment period, types of aid, and reporting period required. Video tutorials on types of aid and student categories are available on the Association for Institutional Research (AIR) website: [https://www.airweb.org/collaborate-learn/professional-development-training/ipeds-tutorials/student-financial-aid-\(sfa\)](https://www.airweb.org/collaborate-learn/professional-development-training/ipeds-tutorials/student-financial-aid-(sfa)).

Total financial aid amounts and student counts are reported in this survey component. Round total aid amounts to the nearest whole dollar. Do not report cents. Report unduplicated student counts within a given financial aid type (e.g., Federal Pell Grants). However, count each student once for each type of aid. This means a student may appear under more than one aid type (e.g., Federal Pell Grants and Federal Loans to Students).

Section 1, SFA - Undergraduate Students

Detailed Instructions

This section provides line-by-line instructions for each part in Section 1 of the Student Financial Aid component.

Purpose

The purpose of the section is to collect student counts and financial aid amounts for degree/certificate-seeking undergraduate students and non-degree-certificate seeking undergraduate students enrolled during the 2023-24 academic year.

What NOT to Include

Do not report student counts or aid amounts in Section 1 for the following:

- Students who were only graduate students at the institution during the reporting period and
- Students in U.S. Department of Education Experimental sites projects.

Do not report:

- Federal Work Study amounts into any total aid amounts,
- ROTC aid, which is excluded from estimated financial assistance, also known as EFA, 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, or
- Experimental Sites federal financial aid amounts

Part A - Establish Your Student Counts

Part A establishes student counts. Consult with the institution's enrollment data reporter to edit the preloaded student counts on Lines 02 -05 carried forward from the [EF Survey—Academic Reporters, E12—Program Reporters] if needed. Disaggregate the full-time, first-time degree/certificate seeking undergraduate student count reported on Line 05 to report student counts by the financial aid types listed on Lines 06 - 07. Note the data you report on this screen is carried forward to other parts of the Student Financial Aid Survey component and used to perform Cost and Net Price Survey edit checks.

Instructions:

In the fields provided, report the student counts for each student category below. Some values are preloaded from your institution's IPEDS Fall Enrollment (EF) survey component (for academic reporters) or 12-Month Enrollment (E12) survey component for program reporters; these 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.

Line	Description
02.	All undergraduate students [Editable Preload EF—Academic Reporters, E12—Program reporters] For academic reporters, report an unduplicated count of all undergraduate students enrolled for the prior academic year as of October 15 or your institution's official fall reporting date. For program reporters, report an unduplicated count of all undergraduate students enrolled anytime 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 Fall 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.
03.	All degree/certificate-seeking undergraduate students [Editable Preload EF—Academic Reporters, E12—Program reporters] Of those on line 02, those who are degree/certificate-seeking For academic reporters, report the number of degree/certificate-seeking undergraduate students enrolled for the prior academic year as of October 15 or your institution's official fall reporting date. For program reporters, report the number of degree/certificate seeking undergraduate students enrolled during the prior academic year. Include all new and continuing degree/certificate-seeking undergraduate students. This number will be preloaded from your institution's IPEDS Fall Enrollment Survey (EF) for academic reporters or IPEDS 12-Month Enrollment Survey (E12) for program reporters, 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.
04..	All non-degree/certificate-seeking undergraduate students [Editable Preload EF—Academic Reporters, E12—Program reporters] Of those on Line 02 (all undergraduate students), those who are non-degree/certificate-seeking For academic reporters, report the number of non-degree/certificate-seeking undergraduate students enrolled for the prior academic year as of October 15 or your institution's official fall reporting date. For program reporters, report the number of non-degree/certificate-seeking undergraduate students enrolled for the prior academic year, which is typically July1 – June 30. Include all new and continuing non-degree/certificate-seeking undergraduate students. This number will be preloaded from your institution's IPEDS Fall Enrollment Survey (EF) for academic reporters or IPEDS 12-Month Enrollment Survey (E12) for program reporters, 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.
05.	All full-time, first-time degree/certificate-seeking undergraduate students [Editable Preload EF—Academic Reporters, E12—Program reporters] Of those on Line 02, those who are full-time, first-time degree/certificate seeking undergraduates Report the number of students who are full-time, first-time degree/certificate-seeking undergraduates. This number will be preloaded from your institution's IPEDS Fall 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.
06.	Of the full-time, first-time degree certificate-seeking undergraduate students on Line 05), those awarded any of the following (Reported value): • Federal Work Study; • 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, including private grants and scholarships (e.g., Rotary Club Scholarship).
07.	Of the full-time, first-time degree certificate-seeking undergraduate students on Line 05, those awarded any of the following (Reported value): • Government and/or private loans to students; or Grant or scholarship aid from the federal government, state/local government, or the institution.

Parts B,C,D, and E - Financial Aid About -Undergraduate Students – Page 2

[Student category/sub-category loaded based on SFA Survey Part: Part B = All Undergraduate Students (AU), Part C = Degree/Certificate Seeking Undergraduate Students (DGPU), Part D = Non-Degree/Certificate Seeking Undergraduate Students (NDGPU), Part E = Full-Time, First-Time Degree/Certificate Seeking Undergraduate Students (FTFTDGPU)]

Parts B, C, D, and E collect the total student count for each student category that is preloaded at the top of the screen. -Reported student counts in each aid category cannot be greater than this preloaded number. Instructions are the same for each of these parts, the only difference is the student category being reported on. Student counts reported in Section 1, Part A, Lines 02 – 05 are carried forward for all undergraduates, all degree/certificate seeking undergraduates, all non-degree/certificate seeking undergraduates, and full-time, first-time degree/certificate seeking undergraduates and cannot be edited on this screen. Report the student counts requested in Column 1 and total aid amounts requested in Column 3 by aid types listed on Lines 01 – 05. Prior year average aid amounts are listed in Column 5. Prior year amounts are not available (NA) for new data items or for institutions that did not report SFA the prior year. All other row and column values are calculated for the institution by NCES, which includes percentages of students awarded aid and average aid amounts.

Note: The disaggregated student counts reported by aid type for each student category must equal the values carried forward listed under Information from Part A. Because financial aid types reported are disaggregated by financial aid program or program group(s) and students may be awarded from more than one program, each program or program group student count reported must be less than or equal to the student count reported for the main or primary financial type. For example, Federal Pell Grant student counts reported cannot exceed the student count reported for Grant or scholarship aid from the federal government, state/local government, the institution, and other sources known to the institution. You will get an error message if data reported do not meet these conditions.

The total student count for each student category is preloaded at the top of the screen. Reported student counts in each aid category cannot be greater than this preloaded number.

Instructions:

For each applicable student category (Parts B through E), report the number of students receiving each type of aid -and the total amount of aid awarded.

Line	Description
01	Grant or scholarship aid from the federal government, state/local government, the institution, and other sources known to the institution. This type of aid is a program group. It includes all federal, state/local, and institutional grant and scholarship aid described for each entity as defined for IPEDS reporting purposes in the What to Include section of the SFA Survey Instructions. This program group is disaggregated into two program groups— grant or scholarship aid from the federal government, state/local government, the institution on Line 01a—and grant and scholarship aid from other sources known to the institution on Line 01b.
	Column 1. Total number of students in applicable category awarded one or more type of grant or scholarship aid from the federal government, state/local government, the institution, or other sources known to the institution. (Reported value) This is an unduplicated student count. If a student was awarded aid from more than one type listed on Lines 01 through 04, count the student once for Line 01. This student count must be greater than or equal to the largest student count reported on Lines 01a through 04.
	Do not include work study awards or earnings; veteran's education benefits; military service education benefits; students grants or scholarships from private sources only (e.g., Rotary Club Scholarship); other specifically excluded from this financial aid program group in Section 1 of the instructions.
	Column 2. Percentage of students in applicable category awarded one or more types of grants or scholarship aid from the federal government, state/local government, the institution, and other sources known to the institution. (Calculated value)
	Column 3. Total dollar amount of financial aid awarded for this program group to students in applicable category students (Reported value).
	Column 4. Average 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 students in applicable category students. (Calculated value)
01a	Column 5. Average 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 students in applicable category students. (Prior year value)
	Grant or scholarship aid from the federal government, state/local government, or the institution. This type of aid is a program group. It includes all federal, state/local, and institutional grant and scholarship aid described for each entity as defined for IPEDS reporting purposes in the What to Include section of the SFA Survey Instructions.
	Column 1. Total number of students in applicable category awarded one or more type of grant or scholarship aid from the federal government, state/local government, or the institution. (Reported value) This is an unduplicated student count for this financial aid program group. If a student was awarded aid from more than one type listed on Line 01a, count the student once for Line 01a. A student may be counted on Line 01 and line 01a. This student count must be less than or equal to Line 01 but greater than or equal to the student count reported on Line 01b.
	Do not include work study awards or earnings; veteran's education benefits; military service education benefits; students awarded grants or scholarships from private sources only (e.g., Rotary Club Scholarship); or other aid specifically excluded from this financial aid program group in Section 1 of the instructions.
	Column 2. Percentage of students in applicable category awarded one or more types of grants or scholarship aid from the federal government, state/local government, or the institution. (Calculated value)
	Column 3. Total dollar amount of financial aid awarded for this program group to students in applicable category (Reported value).
01b	Column 4. Average dollar amount of grant or scholarship aid from the federal government, state/local government, or the institution awarded to students in applicable category. (Calculated value)
	Column 5. Average dollar amount of grant or scholarship aid from the federal government, state/local government, or the institution awarded to students in applicable category. (Prior year value)
	Grant or scholarship aid from other sources known to the institution. This type of aid is a program group. It includes grant and scholarship aid from other sources known to the institution not reported Line 01a such as private grant and scholarships for which the institution does not determine the recipients (i.e., funds that pass-through this institution to the student). Do not include federal, state/local, and institutional

	grant and scholarship aid described for each entity as defined for IPEDS reporting purposes in the What to Include section of the SFA Survey Instructions.
	Column 1. Total number of students in applicable category awarded one or more type of grant or scholarship aid from other sources known to the institution. (Reported value) This is an unduplicated student count for this financial aid program group. If a student was awarded aid more than one private grant or scholarship source, or other source known to the institution, count the student once on Line 01b. A student may be counted once on Line 01, Line 01a, and Line 01b. This student count must be less than or equal to Line 01.
	Do not include work study awards or earning; veteran's education benefits; military service education benefits; or other aid specifically excluded from this financial aid program group in Section 1 of the instructions.
	Column 2. Percentage of students in applicable category awarded one or more types of grants or scholarship aid from other sources known to the institution. (Calculated value)
	Column 3. Total dollar amount of financial aid awarded for this program group to students in applicable category (Reported value).
	Column 4. Average dollar amount of grant or scholarship aid from other sources known to the institution awarded to [AU, DGCU, NDGCU, or FTFTDGCU]. (Calculated value)
	Column 5. Average dollar amount of grant or scholarship aid from the other sources known to the institution awarded to [AU, DGCU, NDGCU, or FTFTDGCU]. (Prior year value)
02	Federal grant and scholarship aid. This aid type is disaggregated into one financial aid program— Federal Pell Grants —and a program group— Other federal grant and scholarship aid . Report the federal share of grants and scholarships provided by federal agencies such as the U.S. Department of Education. Include Title IV federal student aid program grants such as Federal Pell Grants, FSEOG, and TEACH Grants and federal grants and scholarships awarded by other federal agencies/entities such as the Department of Health and Human Services, or HHS agencies. 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 veterans' education benefits, as defined in section 480(c) of the HEA of 1965, as amended. For more information, see the Guidance on Federal Veterans' Education Benefits for Purposes of the Title IV Student Assistance Programs Q&A posted on August 30, 2009, on the Federal Student Aid Knowledge Center website. Do not include Post 9-11 Veterans' education assistance or Department of Defense Tuition Assistance benefits since these programs are reported in Section 2 of the SFA Survey.
	Column 1. Total number of students in applicable category awarded one or more types of federal grant or scholarship aid. (Reported value) This is an unduplicated count. If a student was awarded aid from more than one type listed on Lines 02a through 02b, count the student once on Line 02. This student count must be less than or equal to the student count reported on Line 01, and greater than or equal to the largest student count reported on Lines 02a and 02b.
	Column 2. Percentage of students in applicable category awarded one or more types of federal grant or scholarship aid. (Calculated value)
	Column 3. Total dollar amount of all financial aid awarded for this program group to [AU, DGCU, NDGCU, or FTFTDGCU]. (Reported value)
	Column 4. Average dollar amount of federal grant and scholarship aid awarded to students in applicable category. (Calculated value)
	Column 5. Average dollar amount of federal grant and scholarship aid awarded to students in applicable category. (Prior year value)
02a	Federal Pell Grants. (Add IPEDS glossary link) Column 1. Total number of students in applicable category awarded a Federal Pell Grant. (Reported value) This is an unduplicated count. Count each student who received a Federal Pell Grant once on Line 02a. Count the student once even if the student received more than one full Federal Pell Grant award under the year-round Pell (also known as additional Pell) program. This student count must be less than or equal to the Federal grant and scholarship aid count reported in Column 1, Line 02.
	Column 2. Percentage of students in applicable category awarded a Federal Pell Grant. (Calculated value)
	Column 3. Total dollar amount of all Federal Pell Grants awarded to students in applicable category. (Reported value)
	Column 4. Average dollar amount of Federal Pell Grants awarded to students in applicable category. (Calculated value)
	Column 5. Average dollar amount of Federal Pell Grants awarded to students in applicable category. (Prior year value)
02b	Other federal grant and scholarship aid. Report the federal share only. Do not include Post-9/11 Yellow Ribbon tuition and fee waivers. Column 1. Total number of students in applicable category awarded one or more type of Other federal grant or scholarship aid. (Reported value) This is an unduplicated count and must be less than or equal to the Federal grants and scholarships aid count reported in Column 1, Line 02. Do not include students awarded Federal Pell Grants only.
	Column 2. Percentage of students in applicable category awarded Other federal grant or scholarship aid. (Calculated value)
	Column 3. Total dollar amount of all Other federal grant and scholarship aid awarded to students in applicable category. (Reported value)
	Column 4. Average dollar amount of Other federal grant and scholarship aid awarded to students in applicable category. (Calculated value)
	Column 5. Average dollar amount of Other federal grant and scholarship aid awarded to students in applicable category. (Prior year value)
03	State/local government grant and scholarship aid (includes fellowships, waivers, and employee exemptions). Report grants, scholarships, fellowships, waivers, and employee exemptions funded or awarded by the state or local government where the institution is located. Include all municipalities, townships, and other jurisdictions within the state. Include need-based and merit-based grants and scholarships. Also include tuition and fee waivers, and employee exemptions for which your institution was reimbursed by a state or local government agency. Report the state and local share of the awards only. Do not include the federal or institutional shares of grant, scholarship, fellowship, waiver, or employee exemption awards. Do not include funds known and passed through to the institution for the student by the state on behalf of a non-state or non-local entity.
	Column 1. Total number of students in applicable category awarded one or more type of grant or scholarship aid from a state/local government. (Reported value) This is an unduplicated count and must be less than or equal to grant or scholarship aid from the federal government, state/local government, or the institution in Column1, Line 01. Do not include federal or institutional grant or scholarship aid, or other aid known to the institution from a non-state or non-local entity.
	Column 2. Percentage of students in applicable category awarded grant or scholarships aid from a state/local government. (Calculated value)
	Column 3. Total dollar amount of all grant and scholarship from the state/local government awarded to students in applicable category. (Reported value)

	Column 4. Average dollar amount of grant and scholarship aid awarded from the state/local government awarded to students in applicable category. (Calculated value)
	Column 5. Average dollar amount of grant and scholarship aid awarded from the state/local government awarded to students in applicable category. (Prior year value)
O4	Institutional grant or scholarship aid (includes fellowships, waivers, and employee exemptions). Report grants, scholarships, fellowships, waivers, and employee exemptions granted and funded, or awarded by the institution and/or individual departments within the institution limited to students attending the institution. 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, and employee exemptions for which your institution was not reimbursed by a state or local entity. Include institutional grants, and the non-work-study portion of scholarships, fellowships, and waivers used to satisfy matching requirements for other programs. Do not include the work study portion of financial aid awards. Do not include grants, scholarships, fellowships, waivers, or employee exemptions passed through to the institutional from other entities if the institution does not select or designate the recipient. Do not include the federal or state matching share of financial aid awards. Column 1. Total number of students in applicable category awarded one of more type of grant or scholarship aid from the institution. (Reported value) This is an unduplicated count and must be less than or equal to grant or scholarship aid from the federal government, state/local government, or the institution in Column 1, Line 01. Do not include federal grant or scholarship aid; state grant or scholarship aid; or other aid types awarded excluded above. Column 2. Percentage of students in applicable category awarded grant or scholarship aid from the institution. (Calculated value) Column 3. Total dollar amount of all grant and scholarship aid from the institution awarded to students in applicable category. (Reported value) Column 4. Average dollar amount of grant and scholarship aid from the institution awarded to students in applicable category. (Calculated value) Column 5. Average dollar amount of grant and scholarship aid from the institution awarded to students in applicable category. (Prior year value)
O5	Loans to students. This aid type is disaggregated into two program groups—Federal loans to students and Other loans to students (including private loans). Report loans awarded to and accepted by the student. Include money borrowed by the student from the federal government that must be repaid. Include all Title IV federal student loan programs. Include all institutionally sponsored short-term and long-term education loans to students made by the institution or its Schools, Colleges, or student organizations. Include emergency education loans backed by a surety (i.e., financial guarantee) and Health Professions Student Loans, Loans for Disadvantaged Students, Nursing Student Loans, Primary Care Loans, and other federal loans borrowed by the student. Include private loans from lending institutions for which the student is the designated borrower. This includes Income Share Agreements and other loans certified by the institution, or known by or passed through the institution, borrowed by the student to cover the student's cost of attendance. Also include loans cosigned by a student borrower to cover the student's education costs if the student is the primary borrower legally obligated to repay to the lender. Exclude loans not made directly to the student such as PLUS loans or loans borrowed by others for the student . Do not include loans contingent on the student's financial aid (also known as payment deferments) not backed by another source of security. Column 1. Total number of students in applicable category awarded one or more type of loan to students. (Reported value) This is an unduplicated count. If a student was awarded and accepted a loan from more than one type listed on Line 05a and Line 05b, count the student once on Line 05. This student count must be greater than or equal to the largest student count reported on Line 05a and Line 05b. Include loans awarded and accepted by the student from federal and state/local government lenders, the institution, and other sources (including private lenders). Column 2. Percentage of students in applicable category awarded (and who accepted) one or more loans to students. (Calculated value) Column 3. Total dollar amount of all loans awarded and accepted by students in applicable category. (Reported value) Column 4. Average dollar amount of loans awarded and accepted by students in applicable category. (Calculated value) Column 5. Average dollar amount of loans awarded and accepted by students in applicable category. (Prior year value)
O5a	Federal loans to students. Report loans awarded and accepted by the student from the federal government that must be repaid by the student for which the student is the designated borrower. Includes all Title IV federal student loan aid such as Subsidized Direct Loans and Unsubsidized Direct Loans. Also include Health Professions Student Loans, Loans for Disadvantaged Students, Nursing Student Loans, Primary Care Loans, and other federal student loans. Do not include PLUS loans <u>or other federal loans for which the student is not a primary borrower.</u> Column 1. Total number of students in applicable category awarded (and who accepted) one or more federal student loan. (Reported value) This is an unduplicated count. Count each student who received a federal student loan once on Line 05a. This student count must be less than or equal to the loans to students reported in Column 1, Line 05. Do not include loans to others (e.g., PLUS loans to parents) and do not include any other type of grant, scholarship, or loan aid. Column 2. Percentage of students in applicable category awarded (and who accepted) one or more federal student loan. (Calculated value) Column 3. Total dollar amount of all federal student loans awarded and accepted by students in applicable category. (Reported value) Column 4. Average dollar amount of federal student loans awarded and accepted by students in applicable category. (Calculated value) Column 5. Average dollar amount of federal student loans awarded and accepted by students in applicable category. (Prior year value)
O5b	Other loans to students (including private loans). Report institutional, private, and other non-federal education loans to students. Include 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). Also include loans borrowed by the student to cover education costs that must be repaid by the student to a lending institution; all institutionally and privately funded or sponsored loans such as Income Share Agreements; and all other loans certified by the institution, or known by or passed through the institution, borrowed by the student to cover the student's the cost of attendance. Included loans cosigned by a student borrower to cover the student's education costs if the student is the primary borrower legally obligated to repay to the lender. Do not include federal education loans. Exclude loans not made directly to the student (<u>i.e., the student is not a primary borrower</u>). Do not include loans contingent on the student's financial aid (also known as payment deferments) not backed by another source of security. Column 1. Total number of students in applicable category awarded (and who accepted) one or more Other loans to students (including private loans). (Reported value)

	This is an unduplicated count. Count each student awarded (and who accepted) one or more Other loans to students once on Line 05b. This student count must be less than or equal to the loans to students reported in Column 1, Line 05. Do not include federal loans or loans to others (e.g., the student's parents or spouse). Do not include any other type of aid such as grants or scholarships. Do not include loans contingent on the student's financial aid (also known as payment deferments) not backed by another source of security.
	Column 2. Percentage of students in applicable category awarded (and who accepted) one or more loans Other loans to students (including private loans. (Calculated value)
	Column 3. Total dollar amount of all Other loans to students awarded and accepted by students in applicable category . (Reported value)
	Column 4. Average dollar amount of Other loans to students awarded and accepted by students in applicable category . (Calculated value)
	Column 5. Average dollar amount of Other loans to students awarded and accepted by students in applicable category . (Prior year value)

Section 2. Military Servicemembers and Veteran Students with Benefits

Purpose of Survey Component

The purpose of this section is to collect student counts and financial assistance amounts known to the institution disbursed to undergraduate and graduate students enrolled during the 2024-25 academic year.

Detailed Instruction

This section provides line-by-line instructions for reporting Post-9/11 GI Bill benefits and Department of Defense Tuition Assistance to IPEDS.

Screening Question

Indicate whether your institution participated in the U.S. Department of Veterans Affairs Post-9/11 GI Bill or U.S. Department of Defense Military Tuition Assistance benefit programs during the 2024-25 award period. If your institution participated in either program, check yes and check which program(s) your institution participated in. Responding 'Yes' to this question means your institution will report Section 2.

Instructions:

Report student counts and the total benefit amounts for undergraduate and graduate students.

What NOT to Include

Do not report the following aid types in student counts and total benefit amounts:

- Post-9/11 GI Bill Yellow Ribbon program institutional or state match,
- VA Work Study, or
- ROTC aid, which is excluded from estimated financial assistance, also known as EFA.

Reporting Reminders:

- Report student counts and total benefit amounts disbursed known to the institution for the U.S. Department Veteran's Affairs Post-9/11 GI Bill Program.
- Report student counts and disbursed amounts received and disbursed by the institution for the U.S. Department of Defense Tuition Assistance Program.
- 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.
- A student may receive benefits at the undergraduate level and the graduate level during award period.
- 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 institutional or state matching share for 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 recipients for the financial assistance program or program level.

Line	Description
	Post-9/11 GI Bill Benefits for undergraduate and graduate students. The U.S. Department of Veterans Affairs provides up to 36 months of Post-9/11 GI Bill Benefits for tuition and fees; books and supplies; and housing for veterans who served on active duty after September 10, 2001. The tuition and fees are disbursed to the institution—passed through the institution to the student. Report student counts and disbursed amounts known to the institution for tuition and fees; books and supplies; and housing benefits for students enrolled during the prior 2024-25 academic year and disbursed for the July 1, 2024, to June 30, 2025, award period. Note: It is possible to disburse benefits to a student enrolled for the academic year at the undergraduate level and the graduate levels. If benefits were disbursed to a student at the undergraduate and graduate levels for the award period, count the student and the aid disbursed at both levels. For example, if \$500 for tuition and fees was disbursed to Jane as an undergraduate student and \$800 for tuition and fees was disbursed to Jane as a graduate student, (1) count Jane once as an undergraduate and include the \$500 disbursed in the total dollar amount of benefits/assistance disbursed to undergraduate students and (2) count Jane once as a graduate student and include the \$800 disbursed in the total dollar amount of benefits/assistance disbursed to graduate students. It is also possible for a student to received Post-9/11 GI Bill benefits and Department of Defense Tuition Assistance during the same academic year. If benefits were disbursed to a student for both programs during the reporting periods requested, count the student and report the aid disbursed for both programs. Lastly, it is possible Post-9/11 benefits for the reporting period were disbursed after the last day of the award period. Include funds disbursed after June 30, 2025, for the prior 2024-25 award period. Do not include Yellow Ribbon Program institutional match.

01	Post-9/11 GI Bill Benefits disbursed to undergraduate students. Report Post-9/11 tuition and fees, books and supplies, and housing benefits disbursed to undergraduate students known to the institution.
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	Do not include graduate students or Yellow Ribbon Program institutional or state match. Column 1. Unduplicated number of undergraduate students disbursed benefits through the institution. (Reported value) This is an unduplicated student count. Report the total number of undergraduate students disbursed Post-9/11 GI Bill education benefits for the award period known to the institution. Column 2. Total dollar amount of benefits disbursed to undergraduate students known to the institution. (Reported value) Column 3. Average dollar amount of benefits disbursed to undergraduate students known to the institution. (Calculated value) Column 4. Average dollar amount of benefits disbursed to undergraduate students known to the institution. (Prior year value)
02	Post-9/11 GI Bill Benefits disbursed to graduate student. Report Post-9/11 tuition and fee, books and supplies, and housing benefits disbursed to graduate students known to the institution. Do not include undergraduate students or Yellow Ribbon Program institutional or state match. Column 1. Unduplicated number of graduate students disbursed benefits through the institution. (Reported value) This is an unduplicated student count. Report the total number of graduate students disbursed Post-9/11 GI Bill education benefits for the award period known to the institution. Column 2. Total dollar amount of benefits disbursed to graduate students known to the institution. (Reported value) Column 3. Average dollar amount of benefits disbursed to graduate students known to the institution. (Calculated value) Column 4. Average dollar amount of benefits disbursed to graduate students known to the institution. (Prior year value)
03	Post-9/11 GI Benefits Program Totals. Column 1. Total number of undergraduate and graduate students disbursed benefits known to the institution. (Calculated value) This is the total number students at all program levels disbursed benefits/assistance. The is not an unduplicated count since a student disbursed benefits at the undergraduate and graduate levels for the same award period may be counted once at each level. Column 2. Total dollar amount of benefits disbursed to all students known to the institution. (Calculated value) Column 3. Average dollar amount of benefits disbursed to all students known to the institution. (Calculated value) Column 4. Average dollar amount of benefits disbursed to all students known to the institution. (Prior year value)
Department of Defense Tuition Assistance for undergraduate and graduate students. The U.S. Department of Defense's Military Tuition Assistance (TA) program is a federal program available to eligible servicemembers. It includes active-duty military, selected reserve, coast guard, and army national guard personnel and pays up to 100% of college tuition and course-specific fees for enrollment at a U.S. Department of Education accredited postsecondary institution to support voluntary off-duty professional and self-development education goals. Funds disbursed are paid directly to the institution—passed through the institution to the student. Report tuition and fee benefits for students enrolled during the prior 2024-25 academic year and disbursed for the October 1, 2024, to September 30, 2025 award period. Note: It is possible for the institution to disburse benefits to a student enrolled for the academic year at the undergraduate level and the graduate levels. If the institution disbursed benefits to a student at the undergraduate and graduate levels for the award period, count the student and the aid disbursed at both levels. For example, if \$700 for tuition and fees was disbursed to A student as an undergraduate student and \$500 for tuition and fees was disbursed to A student as a graduate student, (1) count The student once as an undergraduate and include the \$700 disbursed in the total dollar amount of benefits/assistance disbursed to undergraduate students and (2) count The student once as a graduate student and include the \$500 disbursed in the total dollar amount of benefits/assistance disbursed to graduate students. It is also possible for a student to received Department of Defense Tuition Assistance and Post-9/11 GI Bill benefits during the same academic year. If a student was disbursed benefits for both programs during the reporting periods requested, count the student and report the benefit for both programs. Lastly, it is possible for an institution to received and disburse Department of Defense Tuition Assistance for the reporting period after the last day of the award period. Include funds received and disbursed after September 30, 2025, for the prior 2024-25 award period.	
04	Department of Defense Tuition Assistance received and disbursed to undergraduate students. Report TA benefits received and disbursed to undergraduate students. Do not include graduate students. Column 1. Unduplicated number of undergraduate students who received assistance disbursed through the institution. (Reported value) This is an unduplicated student count. Report the total number of undergraduate students disbursed TA benefits for the award period. Column 2. Total dollar amount of assistance received and disbursed to undergraduate students through the institution. (Reported value) Column 3. Average dollar amount of assistance received and disbursed to undergraduate students through the institution. (Calculated value) Column 4. Average dollar amount of benefits/assistance received and disbursed to undergraduate students through the institution. (Prior year value)
05	Department of Defense Tuition Assistance received and disbursed to graduate student. Report TA benefits received and disbursed to graduate students.

	Do not include undergraduate students.
	Column 1. Unduplicated number of graduate students who received assistance disbursed through the institution. (Reported value) This is an unduplicated student count. Report the total number of graduate students disbursed TA benefits for the award period.
	Column 2. Total dollar amount of assistance received and disbursed to graduate students through the institution. (Reported value)
	Column 3. Average dollar amount of assistance received and disbursed to graduate students through the institution. (Calculated value)
	Column 4. Average dollar amount of assistance received and disbursed to graduate students through the institution. (Prior year value)
06	Department of Defense Tuition Assistance Totals.
	Column 1. Total number of undergraduate and graduate students who received assistance disbursed through the institution. (Calculated value) This is the total number students at all program levels disbursed assistance through the institution. The is not an unduplicated count since a student disbursed aid at the undergraduate and graduate levels for the same award period may be counted once at each level.
	Column 2. Total dollar amount of assistance received and disbursed to all students through the institution. (Calculated value)
	Column 3. Average dollar amount of assistance received and disbursed to all students through the institution. (Calculated value)
	Column 4. Average dollar amount of assistance received and disbursed to all students through the institution. (Prior year value)

Student Financial Aid FAQs 2025-26 through 2026-27

General	
1	<u>Which institutions are required to complete the IPEDS Student Financial Aid (SFA) component?</u> All postsecondary institutions that either 1.) participated in Title IV federal student financial aid programs or 2.) were eligible to participate in Title IV federal student financial aid programs any time during the 2024-25 SFA reporting periods requested for the 2025-26 IPEDS Data Collection Cycle.
2	<u>What is the reporting period covered by SFA for the 2025-26 collection year?</u> For the 2024-25 data collection, institutions should report award or disbursement data for students enrolled during academic year 2024-25. 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 students who received benefits from July 1, 2024 to June 30, 2025 known to the institution. - The data reported for the Department of Defense Tuition Assistance Program questions should be for students for whom the institution received and disbursed benefits from October 1, 2024 to September 30, 2025.
3	<u>What changes occurred for SFA for the 2025-26 collection year?</u> The following changes were implemented for the 2025-26 data collection period: - Changed Section 1 of the SFA Survey to the collect the same student counts and aid amounts for categories and sub-categories of undergraduate students. - What was previously Part B, which included all undergraduates, all degree/certificate-seeking undergraduates, and all non-degree/certificate-seeking undergraduates has been split into 3 parts – Part B (All undergraduates), Part C (All degree/certificate-seeking undergraduates), and Part D (All non-degree/certificate-seeking undergraduates) - Additional aid types have been added for these categories to align with data collected for FTFT non-degree/certificate-seeking undergraduates - What was previously Part C is now Part E, which includes all First-time, full-time degree/certificate-seeking undergraduates - Additional aid types have been added for these categories to align with data collected for the other student categories in Parts B-D - Clarified instructions that institutions need to include Iraq and Afghanistan Service Grant (IASG) awards in Federal Pell Grant student counts and award amounts reported to IPEDS due to a change mandated under the Fostering Undergraduate Talent by Unlocking Resources (FUTURE) Act. - Clarified what benefits need to be included in Section 2 of the survey component - Institutions should report Department of Veteran Affairs Post-9/11 GI Bill tuition and fee, books and supplies, and housing benefits disbursed known to the institution in Section 2 of the SFA Survey. - Clarified that institutions need to report the federal share of Department of Veteran Affairs Yellow Ribbon benefits disbursed known to the institution in Section 2 of the SFA Survey. - Revised FAQs and made other minor edits for clarity.
4	<u>Can I revise my institutions cost of attendance (COA) data in SFA?</u> No. Beginning with the 2024-25 data collection, COA data is collected in the new IPEDS Cost (CST) survey component. See the CST Survey Instructions and Q&A for information about COA revisions.
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.
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. Do not include incarcerated students participating in U.S. Department of Education Experimental Sites projects.

Student Counts	
1	<u>For which students should I report financial aid information?</u> 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, • Degree/certificate-seeking undergraduate students, • Full-time, first-time (FTFT) degree/certificate-seeking undergraduate students , • Non-degree/certificate seeking undergraduate students , and • Undergraduate and graduate students who received certain military service and veterans' education benefits. Contact and work closely with the financial aid office and your institution's IPEDS enrollment data reporter if you have questions on how to count retroactive enrollment adjustments, retroactive financial aid award adjustments, late financial aid awards, or other administrative adjustments.
Financial Aid	
1	<u>Should veterans' education benefits be reported?</u> Report U.S. Department of Veterans Affairs Post-9/11 GI Bill and Department of Defense Tuition Assistance benefits in Section 2 of the SFA Survey if your institution participates in these programs. See Section 2 of the SFA Survey Form and the General and Detailed Instructions for more information.
2	<u>How should I report Post-9/11 GI Bill "Yellow Ribbon" benefits?</u> 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 or state part of this aid, whichever is applicable, 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 reported in Section 1 of the SFA survey component. However, both Post-9/11 GI Bill and Yellow Ribbon beneficiaries and federal dollar amounts should be reported in Section 2 of the survey component.
3	<u>The maximum amount of Department of Defense (DOD) Tuition Assistance (TA) program assistance available to service members each fiscal year per student is \$4500. What do I do if my DOD TA average is greater than \$4500 per student?</u> The DOD TA fiscal year is the same as the program award period October 1 to September 30. 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 TA average is greater than \$4500 per student per award year, then you should: 4. 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, etc.); 5. Confirm you included disbursements for the DOD TA October 1 – September 30 award period, which technically covers two fall periods. Only include disbursements – for the fall first fall for the 2024-25 academic year; and 6. Since eligibility requirements may vary from one branch of the service to another, make sure exceptions to the rules confirmed by your institution's certifying official are reported as IPEDS explanation edits, if applicable.
4	<u>What types of financial aid should be reported?</u> 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 award amounts. That is, include the federal and matching share, regardless of the source of the match. Also, FSEOG 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 and scholarships (includes educational assistance funds): Grants and scholarships provided by federal agencies such as the U.S. Department of Education. Include Title IV federal student aid program grants such as Federal Pell Grants, FSEOG, and TEACH Grants and federal grants and scholarships awarded by various Department of Health and Human Services, or HHS agencies. Also include need-based and merit-based educational assistance funds and training vouchers provided from other federal agencies and federally- sponsored educational benefits programs. Do not include veterans' education benefits, as defined in section 480(c) of the HEA of 1965 as amended. For more information, see the <i>Guidance on Federal Veterans' Education Benefits for Purposes of the Title IV Student Assistance Programs</i> Q&A posted on August 30, 2009, on the Federal Student Aid Knowledge Center website. • 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 at the institution; in community service activities on- campus or off-campus; or 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. It includes, but is not limited to, assistantships, apprenticeships, internships, externships, and cooperative education experiences. It may also include work-based fellowships. 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. 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. It includes all Title IV federal student loan aid such as Subsidized Direct Loans and Unsubsidized Direct Loans. It also includes Health Professions Student Loans, Loans for Disadvantaged Students, Nursing Student Loans, Primary Care Loans, and other federal student loans. Do not include PLUS loans and other federal loans not made directly to the student (i.e., the student is not a primary borrower). • State/local government grants and scholarships (includes fellowships, waivers, and employee exemptions): Grants, scholarships, fellowships, and waivers funded or awarded by the state/local government where the institution is located including the state matching share of Leveraging Educational Assistance Partnerships (LEAP) (formerly SSIGs), the Special Leveraging Educational Assistance Program (SLEAP), the Grants for Access and Persistence (GAP) Program, and other awards to students. Include need-based and merit-based grants or scholarships provided by a state or local government. Also include tuition and fee waivers, and employee exemptions for which your institution was reimbursed by a state or local government agency. Do not include the federal or institutional share of grant, scholarship, fellowship, waiver awards or employee exemption. Do not include federal or other pass-through funds known to the institution (i.e., funding provided to the institution by the state for students on behalf of a non-state or non-local entity). • Institutional grants and scholarships (includes fellowships, waivers, and employee exemptions): Grants, scholarships, fellowships and waivers granted and funded, or awarded by the institution and/or individual departments within the institution limited to students attending the institution. 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, and employee exemptions for which your institution was not reimbursed by a state or local government agency. Include institutional grants, and the non-work-study portion of scholarships, fellowships, and waivers used to satisfy matching requirements for other programs. Do not include the work study portion of awards. Do not include grants, scholarships, fellowships, waivers, and employee exemptions passed through to the institutional from other entities if the institution does not select or designate the recipient. Do not include the institutional or state matching share of Post-9/11 Yellow Ribbon tuition and fee waivers. • 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 (i.e., the student is not a primary borrower), 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 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 also known as pass-through funds (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 such as Income Share Agreements. Do not include loans that are not made directly to the student (i.e., the student is not a 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. • 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. Some benefits may be transferred to dependents. Do not include Yellow Ribbon Program institutional or state match. • Department of Defense Military Tuition Assistance Program: A federal program available to eligible servicemembers, which includes active duty, selected reservist, coast guard, and army national guard personnel to pay up to 100% of college tuition and course-specific fees. Funds are paid directly to the institution for enrollment in a U.S. Department of Education accredited postsecondary institution to support voluntary off-duty professional and self-development education goals. • Other Sources Known to the Institution: This includes other types of aid not listed in any of the aid types defined above but not excluded in the IPEDS SFA Survey instructions. Note different parts of the SFA survey component ask institutions to report different types of financial aid. Please review the instructions and the survey screens carefully to ensure you are reporting the correct types of financial aid in the appropriate parts.
5	<u>Do I report financial aid awards for students who attend in the summer?</u> The institution may make summer awards at the beginning or the end of the academic year. Report summer financial aid student counts and award amounts during the academic year assigned by the financial aid office at your institution.
6	<u>What is the time period for which I should report financial aid amounts?</u> In general, financial aid data is reported for the prior 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. In Section 1 of the SFA Survey, institutions report financial aid awarded to students for the reporting period(s) requested enrolled during Fall 2023 for academic year reporters, and any time during the academic year 2024-25 as defined by the institution for program reporters. In Section 2 of the SFA Survey, institutions report Post-9/11 GI Bill program disbursed known to the institutions for the July 1 to June 30 award period. The reporting period Department of Defense Tuition Assistance program benefits received and disbursed through the institution is October 1 to September 30.
7	<u>Should tuition and fee waivers be reported?</u>

	Yes, all tuition and fee waivers should be reported except the VA, and institutional and state shares of Post-9/11 Yellow Ribbon tuition and fee waivers. Tuition and fee waivers for which your institution was reimbursed by a state/local agency should be reported as state/local government grants and scholarships. Tuition and fee waivers granted by your institution (for which your institution is not reimbursed from another source) should be reported as institutional grants and scholarships.
8	<u>Where in Part C should I report tribal aid?</u> In general financial aid funded by the federal government should be reported under the applicable federal financial aid program or program group, and financial aid funded by state/local governments, including tribes, should be reported under the applicable state/local financial aid program or program group.
9	<u>Should PLUS loans be reported?</u> 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 to IPEDS.
10	<u>What does "aid awarded" mean?</u> In the financial aid survey component, "aid awarded" refers to grant, scholarship, or loan aid awarded to students. For grant or scholarship aid, institutions should report aid awarded to students. This amount may be different from the amount 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 loans to students, institutions should report loans awarded to and accepted by the student. Institutions report Post-9/11 veterans' benefits disbursed known to the institution, and DOD Tuition Assistance benefits received and disbursed through the institutions during the reporting periods requested.
11	<u>If a student is awarded more than one type of aid, do I count him/her twice?</u> Yes, count each student once for each financial aid type in Section 1 or benefit program in Section 2. In general, aggregated amounts are unduplicated counts whereas disaggregated program and program counts may contain duplicated student counts. For example, if a student was awarded both a Federal Pell Grant and institutional aid, he/she should be counted once in Section 1, Part B, Line 01, and once in Section 1, Part B, Line 02 under both types of aid.
12	<u>The institution awards grants funded by an affiliated foundation. How should these grants be reported?</u> 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.
13	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 to IPEDS.
14	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.
15	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.