

Integrated Postsecondary Education Data System

Student Financial Aid Survey Overview

Tutorial Script

2023-24 Data Collection Cycle

On behalf of the Institute for Education Science's, IES, National Center for Education Statistics, NCES, and the Association for Institutional Research, AIR, welcome to this tutorial on the IPEDS Student Financial Aid Survey, also called SFA.

The purpose of this tutorial is to provide an overview of the SFA Survey. After completing this tutorial, participants will know:

- The purpose of the SFA survey and when data is collected;
- Who is required to submit data and the consequences of non-compliance;
- The type of data collected and how it is used; and
- The different types of data reporters for IPEDS reporting purposes.

The purpose of the SFA Survey is to collect information about financial aid awarded to two categories of students—undergraduates and graduates. Institutions submit data for undergraduate and graduate students for various types of financial aid and NCES makes the data available to data consumers and data users.

The SFA Survey is part of the IPEDS winter data collection, which opens in early December. Data entry must be completed and finalized by the end of the collection period, in mid-February, when the Keyholder locks the data. Some institutions also have IPEDS Coordinators. Coordinators have an additional two weeks to review the data and lock the survey component.

Data collected on IPEDS surveys provide a basis for postsecondary education data analysis and consumer information. The Higher Education Act of 1965, as amended, stipulates, "...institutions will complete surveys conducted as part of the Integrated Postsecondary Education Data System (IPEDS)...in a timely manner and to the satisfaction of the Secretary." To meet this requirement, institutions participating in Title IV federal student aid programs must report data to IPEDS on:

1. Admissions;
2. Enrollments;
3. Program completions;
4. Graduation rates;
5. Education outcomes;
6. Faculty and staff;
7. Academic libraries;
8. Finances;
9. Institutional costs; and
10. Student financial aid.

Institutions receiving Title IV student financial aid must complete all applicable IPEDS surveys. Currently, over 6,000 institutions submit data to IPEDS, with a number doing so voluntarily. Annually, NCES is required to provide a list of noncompliant institutions to the Office of Postsecondary Education. Failure to comply with this reporting requirement may result in warnings, costly fines, and/or loss of Title IV eligibility. More information about fines can be found on the Statutory Requirements page at <https://surveys.nces.ed.gov/ipeds/ViewIPEDSStatutoryRequirement.aspx>

The SFA Survey has two sections. Institutions report data for undergraduate students only in Section I. Whereas institutions report data for undergraduate and graduate students who received certain military service and veterans' educational benefits in Section II.

Section I collects data on undergraduates and three subsets of this group:

- All undergraduates;
- All first-time, full-time degree or certificate-seeking undergraduates;
- All first-time, full-time degree or certificate seeking undergraduates awarded grant and/or scholarship aid from federal, state, or local governments, or the institution; and
- All first-time, full-time degree or certificate seeking undergraduates awarded any Title IV federal student financial aid, including Title IV grants, loans, or work-study.

Data collected on Section 1 of the SFA Survey is combined with the average total cost of attendance to calculate average institutional net price for students. Average institutional net price is calculated for students awarded grant or scholarship aid from government and institutional resources, and for students awarded any Title IV federal student aid. Average net price is defined as the total cost of attendance minus grant and scholarship aid awarded. Net price amounts calculated in the SFA Survey are published on College Navigator and also used to populate the Department of Education's College Affordability and Transparency lists. Therefore, it is critical the data be correct.

Three types of data reporters are used for IPEDS reporting purposes. While all institutions may have standard term, nonstandard term, and/or nonterm programs, reporter type is based on the institution's predominant operating calendar.

Academic reporters predominantly have programs with standard academic terms, such as a semester, quarter, trimester. The standard terms may be offered on a 4-1-4 or other academic calendar system.

In Section 1 of the SFA Survey, academic reporters submit:

- Student counts for undergraduates enrolled as of October 15 or the institution's official fall reporting date; and
- Aid awarded to these students any time during the academic year as defined by the institution.

Program reporters operate on calendar systems that may differ by program and/or begin programs on a continuous basis. They may have standard term, nonstandard term, and/or nonterm programs of various lengths measured in credit hour or clock hours.

In Section 1 of the SFA Survey, program reporters submit:

- Student counts for undergraduates enrolled anytime between July 1 and June 30; and

- Aid awarded for the academic year as defined by the institution, which typically falls between July 1 and June 30.

There are also institutions with programs structured like program reporters who enroll students on a continuous basis but charge students based on standard terms instead of the entire period of enrollment like academic reporters. They are considered hybrid reporters for IPEDS reporting purposes. In Section 1 of the SFA Survey, hybrid reporters submit:

- Student counts for undergraduates enrolled between August 1 and October 31; and
- Aid awarded for the academic year as defined by the institution.

Section II of the SFA Survey collects student counts and total dollar amounts disbursed through the institution for Post-9/11 GI Bill benefits and the Department of Defense Tuition Assistance Program. Institutions report separate totals for undergraduate and graduate students.

The SFA Survey includes context boxes for some data items so institutions may provide text to explain or clarify data entries. Notes from context boxes may be displayed on College Navigator. College Navigator was developed to provide comparable information to the public about postsecondary institutions for use by students, parents, counselors, researchers, government agencies, education institutions, and others seeking information on average postsecondary education costs and average aid amounts.

This concludes the Student Financial Aid Overview tutorial. You should be able to:

- Explain the purpose of the SFA survey and when SFA data is collected;
- Identify who is required to submit data and discuss the consequences of non-compliance;
- Describe the type of data collected and how it is used; and
- Define different data reporter types for IPEDS reporting purposes.

If you have questions about reporting data to IPEDS or the IPEDS Data Collection System, contact the IPEDS Data Collection Help Desk at (877) 225-2568 or send an email to Help Desk staff at ipedshelp@rti.org. For assistance using IPEDS data tools, contact the IPEDS Data Use Help Desk at (866) 558-0658 or ipedstools@rti.org.