

Integrated Postsecondary Education Data System Institutional Characteristics and Student Financial Aid Concepts, Terms and Definitions that May Cause Confusion: Summer Financial Aid Awards Tutorial Script 2024-25 Data Collection

Description: To review program formats and other relevant concepts, terms, and definitions used synonymously that have different meanings for the purpose of reporting summer financial aid awards to the Integrated Postsecondary Education Data System (IPEDS).

On behalf of the Institute of Education Sciences' (IES) National Center for Education Statistics (NCES) and the Association for Institutional Research (AIR), welcome to this tutorial on concepts, terms, and definitions that may cause confusion when reporting data to IPEDS.

The purpose of this tutorial is to review commonly misunderstood summer financial aid award concepts and definitions used within the Student Financial Aid (SFA) survey component, and between survey components where other data is collected and used to calculate IPEDS variables.

After completing this tutorial, participants will be able to apply terms and concepts prone to misinterpretation by IPEDS data reporters when discussing the definition of a term for different program formats. They will also be able to identify and assign summer financial aid awards to the appropriate academic year for IPEDS reporting purposes. This will help NCES minimize IPEDS reporting errors and increase IPEDS data integrity.

When Do I Report Financial Aid Awards for Students Who Attend in the Summer?

Institutions offer summer courses and programs in a variety of formats. For some, summer is a full or regular term, or enrollment period. For others, summer is a mini-session, module, or a combination of mini-sessions or modules used to create a full or regular term.

A term or enrollment period is typically the period during which all courses begin and end for Title IV purposes. *Summer terms* may present challenges for IPEDS data reporters because some institutions consider summer the first term of the year while others consider it the last term of the year. Additional complications arise when members of the campus community use

full or regular term, and *standard term* interchangeably when they may have different meanings.

For Title IV purposes, a standard term is a semester, quarter, or trimester. When data reporters see *summer term* and *regular term* in IPEDS survey materials it is sometimes confused with the definition of *standard term* used for Title IV financial aid purposes. To help minimize confusion, NCES changed references to regular term to full term in the IPEDS Survey materials and deleted the definition of Summer Term from the IPEDS Glossary beginning with the 2022-23 data collection cycle.

What is a full term?

The definition of a full term may vary depending on the program format. For a standard term program, it is a semester, quarter, or trimester.

A nonstandard term program may have terms less than 9 weeks or greater than 21 weeks. Some institutions call these semesters, quarters, and trimesters too even though they are nonstandard terms.

A nonterm program can be a clock hour or credit hour program. Whereas a clock hour program is always treated as a nonterm program for Title IV purposes, a credit hour program is nonterm program for Title IV purposes if it does not measure academic progress in a manner normally associated with the type of term (e.g., direct assessment and/or competency-based programs) or enrolls students continuously—that is "it has:

- Courses that do not begin and end within a set period such as a term;
- Courses that overlap terms;
- Self-paced and independent study courses that overlap terms; or
- Sequential courses that do not begin and end within a term."

On the other hand, subscription-based programs are organized by competencies. They measure student progress using a specified level of educational activity such as clock hours or credit hours. These programs are delivered in a variety of formats and financial aid awards may be based on an academic or program calendar.

Important Note: There is an exception to these rules when all students in a program are required to participate in a clinical or practicum. See Volume 3 of the *Federal Student Aid Handbook* for details.

Since institutions may offer programs in a variety of formats, it is important for data reporters to remember:

- A term can be standard, nonstandard, nonterm, or subscription based; **and**
- All institutions may have standard, nonstandard, nonterm, and/or subscription-based programs; **but**

- For IPEDS reporting purposes an institution should use its predominant program calendar system as defined in the IPEDS Glossary—that is, the calendar that fits the majority of its programs.

Do I report financial aid data for the academic year or the award year?

The Student Financial Aid Survey FAQs instruct institutions to report financial aid awards for the academic year for each data collection cycle. This may create a communication barrier for keyholders, coordinators, and other data reporters when working with the financial aid office since students apply for and receive aid for an award year (July 1 – June 30) and institutions may have standard, nonstandard, nonterm, and/or subscription-based programs. Additional complications arise when the student's program or a term starts in one award year and ends in another. Financial aid administrators call this a cross-over award or payment period.

A cross-over award or payment period can occur when a student enrolls in a course or program that begins in one award year (e.g., May 15, 2024) and ends in the subsequent award year (e.g., Aug 15, 2024). For example, a student may receive the financial aid award and payment during the 2023-24 academic year, but it may come from money allocated to the institution for the 2023-24 award year (July 1, 2023 to June 30, 2024), the 2024-25 award year (July 1, 2024 to June 30, 2025), or a combination of both depending on the type of financial aid (grant, loan, or scholarship).

Both the student and the institution have a say in which pot of money the financial aid award comes from for the academic year for summer attendance. A student who will complete all degree or certificate requirements in the summer may opt to get the financial aid award from the year with the largest amount. On the other hand, a student who plans to take a break from college, transfer, or attend another institution later may opt to take the smaller amount when enrollment level or lifetime award limits apply.

The institution has the flexibility to treat summer as the first term or period of enrollment of the academic year—a header—and fund the student's award from the upcoming award year; or the last term or period of enrollment of the academic year—a trailer—and fund the student's award from the preceding award year. The institution can apply this treatment on a student-by-student basis or have a policy where it treats all students the same.

Financial aid awards to students for the 2023-24 academic year are reported to IPEDS on the SFA Survey Component during the Winter 2024-25 Data Collection beginning in December 2024. Therefore, it is important for keyholders, coordinators, and other data reporters to work together with the financial aid office to make sure financial aid data for an award year is reported to IPEDS for the correct academic year. The data reported must be accurate, consistent, and on time.

Another event that impacts when financial aid awards are reported to IPEDS is when a student gains or regains eligibility. A student may gain or regain eligibility for some Title IV programs for

the entire award year. So, a student who attends fall, spring, and summer semester might receive a financial aid award notice in the summer for the entire award year funded from multiple award years. This is also true for high school students in dual enrollment courses or programs. That is, an otherwise eligible dual enrollment high school student may be able to receive a financial aid award in the summer for postsecondary coursework completed after all high school requirements were met but before the high school diploma was conferred.

This is another reason why it is important to remember an institution should use its predominant program calendar system as defined in the IPEDS Glossary and report summer financial aid awards for the academic year requested for each data collection cycle. In most cases, the academic year will be the same as the award year. But they may be different for some summer awards. Contact the financial aid office at your institution if you have questions about reporting summer awards to IPEDS.

This concludes our tutorial on *Concepts, Terms, and Definitions that May Cause Confusion When Reporting Data to the Integrated Postsecondary Education Data System: Summer Financial Aid Awards*. During this presentation, we discussed several concepts and definitions used to describe a term for different program formats. We also demonstrated how to determine the correct academic year for reporting summer financial aid awards.

Please contact the financial aid office on your campus if you have questions about how these concepts, terms, and definitions impact SFA program flexibilities at your institution. If you have questions about reporting your institution's 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.