Annual: Student Financial Aid Record File

- ## Student Financial Aid Profile

Release 1.1 for FY09

Overview: Term Specific Student Financial Aid Record File

Student Financial Aid record information is to be submitted to the Massachusetts Department of Higher Education (MDHE) by **all** institutions that participate in Massachusetts state financial aid programs. The student Financial Aid file layout consists of one file.

The Student Financial Aid Data file includes **1.) all Massachusetts residents enrolled for credit who applied for any type of financial aid for undergraduate programs.** Every enrolled student who applied for financial aid must be included in the Student Financial Aid Record file (i.e. Please report enrolled students that applied for aid, even if they did not receive financial aid for each term the student is enrolled). **2.) In addition, every Massachusetts undergraduate student enrolled for credit who received any type of financial aid award – federal, state, institutional and outside - must be included in the Student Financial Aid Data file, regardless of whether a FAFSA was submitted.**

The format for Student Financial Aid Data file is "comma separated values" (CSV). All alphanumeric data types must be enclosed in double quotes ("). All fields must be delimited by a comma (,).

Each record will represent one award type. One student may have several distinct records indicating the different awards he or she may have received in a given term. For example, if a student is enrolled in the fall term and receives both a Pell Grant and a MASSGrant, there will be two records for that student. Similarly, if a student is enrolled in both the fall and spring terms and receives a Pell Grant in each of those terms, there will be two records for that student.

The specifications of the Student Financial Aid Record file are presented in the following section. A minimal amount of student demographic data is required.

LIST OF STUDENT FINANCIAL AID DATA ELEMENTS

AID001   College ID

An institutional identification code assigned by the MDHE for MA public
institutions.

AID002   Award Year

The award year for which information is being reported.

AID003   Term

The academic term for which information is being reported.

AID004   Student's Social Security Number

The student's social security number.

AID005   Student ID

Identification code assigned to the student by the institution.

AID006   Student's Last Name

The student's last name.

AID007   Student's First Name

The student's first name.

AID008   Student's Middle Initial

The student's middle initial.

AID009   Expected Family Contribution (EFC)

The student's Expected Family Contribution (EFC) that the institution used to
calculate financial aid need.

AID010   Student Education Costs

The student's Education Costs that the institution used to calculate financial aid need.

AID011   Student Need

The student's demonstrated financial aid need that the institution used to award financial aid.

AID012   Student Eligibility Indicator

The indicator of the student's eligibility for any type of financial aid at the school.

AID013   Completed Application Indicator

Indicates whether the student completed a financial aid application (FAFSA) according to the institution's requirements

AID014   Total Credit Hours Registered For

The number of credit hours for which the student is registered**.**

AID015   Awarded Amount

The student's awarded amount for the Term (AID003) being reported and specified by Award Identifier (AID016).

AID016   Award Identifier

The identification number assigned to a specific type of award.

AID017   Award Name

The name of the award fund.

AID018   Disbursed Amount

The student's disbursed amount for the Term (AID003) being reported and specified by Award Identifier (AID016).

AID019   Tuition and Mandatory Fees

The student's tuition and mandatory fees amount for the Term (AID003) being reported.

AID020   Books and Supplies

The student's books and supplies amount for the Term (AID003) being reported.

AID021   Insurance

The student's health insurance amount for the Term (AID003) being reported.

AID022   Completed Application by Deadline

Indicates whether the student completed the application by the institution's published priority deadline.

AID023   Met Academic Requirements

Indicates whether the student met all of the institutional academic program requirements.

AID024   Met Title IV Requirements

Indicates whether the student met all financial aid eligibility requirements for Title IV and State need-based aid.

AID025   Withdrew Indicator

Indicates whether the student withdrew during the semester.

AID001   College ID

An institutional identification code assigned by the MDHE to MA public institutions.

Data Type: Alphanumeric   **Length** Minimum 3   **Format Example** 000
                                        Maximum 3

Code Descriptions

023   University of Massachusetts, Amherst
013   University of Massachusetts, Boston
063   University of Massachusetts, Dartmouth
053   University of Massachusetts, Lowell
022   Bridgewater State College
032   Fitchburg State College
042   Framingham State College
052   Massachusetts College of Art
072   Massachusetts College of Liberal Arts
062   Massachusetts Maritime Academy
082   Salem State College
092   Westfield State College
102   Worcester State College
011   Berkshire Community College
021   Bristol Community College
031   Bunker Hill Community College
041   Cape Cod Community College
051   Greenfield Community College
061   Holyoke Community College
071   Mass Bay Community College
081   Massasoit Community College
091   Middlesex Community College
101   Mt. Wachusett Community College
111   North Shore Community College
121   Northern Essex Community College
131   Quinsigamond Community College
141   Roxbury Community College
151   Springfield Technical Community College

000   All Others

Definition

Code used to identify each college or university in the Commonwealth of Massachusetts.

Instructions

Business Rules	Dependency
Mandatory entry for all institutions	

AID002   Award Year

The award year for which information is being reported.

Data Type: Numeric   **Length** Minimum 4   **Format Example** YYYY
                                        Maximum 4

Code Descriptions

2007   2006-2007 School Year
2008   2007-2008 School Year
2009   2008-2009 School Year
…....

Definition

Enrolled students identified in the file are students who were enrolled for the designated
term/year**.**

Instructions

Business Rules	Dependency
Mandatory entry Year entered must be the fiscal year of awarded data.	

AID003   Term

The academic term for which information is being reported.

Data Type: Numeric   **Length** Minimum 1   **Format Example** 0
                                     Maximum 1

1   Fall
3   Spring
4   Summer

Definition

Term represents the designated time period during the calendar year (i.e., Fall, Spring, and Summer) for which data is being reported. Enrolled students reported in the term file represent students enrolled at the institution for the designated term.

Instructions

Business Rules	Dependency
Mandatory entry	

AID004   Student's Social Security Number (SSN)

The student's social security number.

Data Type: Alphanumeric   **Length** Minimum 9   **Format Example** 111111111
                                       Maximum 9

Code Descriptions

Note : SSN can be reported in the traditional format and can include the hyphens "-".
For example: 123-45-6579 is an acceptable format

Definition

Unique identification number assigned by the Federal government to each citizen and
permanent resident of the United States

According to the Social Security Administration, valid SSNs have the first three values
between 001 and 772, the second two values between 01 and 99 and the last four values
between 0001 and 9999.

Instructions

Business Rules	Dependency
Mandatory entry SSN must be unique for the institution, year, term and Award ID and Award Name. If a student does not have an SSN, due to incomplete application (AID013 = N), **enter 000000000** **DO NOT** enter an identification code assigned by the institution for this item. Institutionally assigned identifiers should only be reported in the Student ID data element.	If the financial aid application is complete (AID013 = Y), then SSN **cannot** be 000000000.

AID005   Student ID

Identification code assigned to the student by the institution.

Data Type: Alphanumeric   **Length**   Minimum 1   **Format Example** 9999999999
                                            Maximum 15

Code Descriptions

Definition

Unique code used by the institution to identify students. Institutions may either use social
security numbers for this purpose or an institutionally assigned identifier.

Instructions

Business Rules	Dependency
Mandatory entry Student ID must be unique for the institution, year, term and Award ID and Award Name.	

AID006   Student's Last Name

The student's last name.

Data Type: Alphanumeric   **Length**   Minimum 1   **Format Example** JONES
                                            Maximum 50

Code Descriptions

Can be either upper case or mixed case

Definition

Instructions

Business Rules	Dependency
Mandatory entry	

AID007   Student's First Name

The student's first name.

Data Type Alphanumeric   **Length** Minimum 1   **Format Example** JAMES
                                       Maximum 32

Code Descriptions

Can be either upper case or mixed case

Definition

Instructions

Business Rules	Dependency
Mandatory entry	

AID008   Student's Middle Initial

The student's middle initial.

Data Type Alphanumeric	**Length** Minimum 1 Maximum 1	**Format Example** E

Code Descriptions

Definition

Instructions

Business Rules	Dependency
Not mandatory but preferred in order to differentiate between students with like first and last names	

AID009   Expected Family Contribution (EFC)

The student's Expected Family Contribution (EFC) that the institution used to calculate financial aid need.

Data Type: Numeric	**Length** Minimum 1 Maximum 6	**Format Example** 1500

Amount Descriptions

The EFC reported should be specific to the term(s) for which the student was enrolled (for credit) and eligible to receive aid.

If Expected Family Contribution is not available, leave this field **blank**. If the EFC is zero, enter **0**. **Do not enter 0 if the EFC is unknown/not available**.

Definition

Example: If a student is enrolled for credit and is eligible for aid in both the fall and the spring and the full-year EFC calculated for the student is $2,000, this should be the value entered for both terms in which the student appears. If the student is only enrolled for credit and eligible for aid in the fall term, then the EFC reported for the student should be proportional to that term.

Instructions

Business Rules	Dependency
Mandatory entry for students with a completed application (AID013=Y) A null value will indicate that EFC is unknown. **EFC must be the same for a given student, institution, fiscal year.**	

AID010   Student Education Costs

The student's Education Costs that the institution used to calculate financial aid need

Data Type: Numeric   **Length**   Minimum 1   **Format Example** 1500
                                              Maximum 6

Amount Descriptions

The Student Cost reported should represent the Annual Education Cost for the student if a student was enrolled (for credit) and eligible to receive aid.

This field includes both direct and indirect costs.

Definition

Example: If a student is enrolled for credit and is eligible for aid in both the fall and the spring and the full-year cost calculated for the student is $8,000, this should be the value entered for both terms in which the student appears. If the student is only enrolled for credit and eligible for aid in the fall term, then the cost reported for the student should be proportional to that term.

Instructions

Business Rules	Dependency
Mandatory entry for students with a completed application (AID013=Y)	
Value must be greater than zero.	
Education Costs must be the same for a given student, institution, fiscal year.	

AID011   Student Need

The student's demonstrated financial aid need that the institution used to award financial aid.

Data Type: Numeric   **Length** Minimum 1   **Format Example** 1500
                                     Maximum 6

Amount Descriptions

The Student Need reported should be specific to the term(s) for which the student was enrolled (for credit) and eligible to receive aid.

Definition

Example: If a student is enrolled for credit and is eligible for aid in both the fall and the spring and the full-year student need calculated for the student is $6,000, this should be the value entered for both terms in which the student appears. If the student is only enrolled for credit and eligible for aid in the fall term, then the student need reported for the student should be proportional to that term.

Instructions

Business Rules	Dependency
Mandatory entry for students with a completed application (AID013=Y)	
Null values default to 0	
Value must NOT be less than zero	
Student Need must be the same for a given student, institution, fiscal year.	

AID012   Student Eligibility Indicator

The indicator of the student's eligibility for any type of financial aid at the school.

Data Type: Alphanumeric   **Length**   Minimum 1   **Format Example** N
                                            Maximum 1

Code Descriptions

N   Student is NOT eligible for financial aid
Y   Student is eligible for financial aid

Definition

An eligible student is one who has met all of the institutional academic program
requirements, has completed the financial aid application by the institution's published
priority or deadline date, and meets all financial aid eligibility requirements for Title IV and
State need-based aid.

Instructions

Business Rules	Dependency
Mandatory entry	
Student Eligibility Indicator must be the same for a given student, institution, fiscal year and term	

AID013   Completed Application Indicator

Indicates whether the student completed a financial aid application (FAFSA) according to the institution's requirements.

Data Type: Alphanumeric   **Length** Minimum 1   **Format Example** N
                                    Maximum 1

Code Descriptions

N   Student did not complete the financial aid application according to requirements
Y   Student did complete the financial aid application according to requirements

Definition

Instructions

Business Rules	Dependency
Mandatory entry	
Completed Application Indicator must be the same for a given student, institution and fiscal year	

AID014   Total Credit Hours Registered For

The number of credit hours for which the student is registered.

Data Type: Numeric	Length	Minimum 1	Format Example 15.5
		Maximum 6	

Code Descriptions

The total credit hours registered for would be based on the term that the student is enrolled in. If a student were enrolled in the Fall for 15 credits and in the Spring for 12 credits, then 15 would be entered for all Fall records for that student and 12 would be entered for all Spring records for that student.

Definition

This data field should include the total credits that a student will earn upon successful completion of all courses in a term. For example, if a student is taking 5 classes that are 3 credits each, this field should read 15.

Instructions

Business Rules	Dependency
Mandatory entry Value must be greater than zero. **Credit Hours must be the same for a given student, institution, fiscal year and term**	With the exception of Clock-Hour schools, Credit Hours must be between 1 and 28 for a given student, institution, fiscal year and term

AID015   Awarded Amount

The student's awarded amount for the Term (AID003) being reported and specified by
Award Identifier (AID016).

Data Type: Numeric	**Length** Minimum 1 Maximum 6	**Format Example** 500

Code Descriptions

If a student applied for and was eligible for financial aid but was awarded none, enter 0.

If a student applied for and was either not eligible or did not complete an application, enter 0.

If Awarded Amount is 0, Award Identifier (AID016) must be 0 (No Award)

Definition

Instructions

Business Rules	Dependency
Mandatory entry Null values results in file rejection Please report one amount for each Term (AID003), Award Identifier (AID016) and Student.	If Award Amount = 0, then no other records should be submitted for that institution, year, student and term. I.e., if a student was eligible for, but received no aid, as indicated by Award Amount = 0, there should not be another record for that student in which he/she received aid in the specified term.

AID016   Award Identifier

The identification number assigned to a specific type of award.

Data Type: Numeric   **Length** Minimum 1   **Format Example** 1
                                    Maximum 2

Code Descriptions

0   No Award (Student applied for and was eligible for aid but received none)

State Financial Aid Programs

1   MASSGrant
2   Performance Bonus
3   Cash (ACCESS) Grant
4   Public Service Grant
5   Foster Child Grant
6   Part Time Grant
7   Paraprofessional Teacher Preparation Grant
8   Christian Herter Scholarship
9   Agnes Lindsay Scholarship
10   Tomorrow's Teachers Scholarship
11   Need Based Tuition Waiver
12   Categorical Tuition Waiver: Veterans, Native American, Senior Citizen
13   Other Tuition Waivers
14   Massachusetts No Interest Loan
15   Other State
16   Gilbert Grant
17   Adams Scholarship
18   MSCBA Housing Grant
19   Early Educators Scholarship
20   One Family Scholarship
21   National Guard Tuition & Fee Assistance
22   Massachusetts Educational Rewards Grant
23   Math & Science Teachers Scholarship
24   Scholar-Internship Match Fund
25   Massachusetts GEAR UP Scholarship

Federal Programs

40   Pell Grant
41   Supplemental Educational Opportunity Grant
42   Robert Byrd Scholarship
43   Federal College Work Study

44   Perkins Loan
45   Subsidized Federal Stafford Loan
46   Unsubsidized Federal Stafford Loan
47   PLUS
48   Other Federal (Non-Title IV aid)
49   Academic Competitiveness Grant (ACG)
50   Federal SMART Grant

Institutional Programs
80   Scholarships
81   Grants
82   Loans
83   Other Institutional Aid

Outside Aid
90   Scholarships
91   Grants
92   Parent Loans
93   Student Loans
99   Other

Definition

Each student may receive more than one type of aid. A separate record should be submitted for each type of aid that a student receives in a given year and term for an institution.

The award identifiers (AID016) values: 80 (Institutional Scholarships), 81 (Institutional Grants), 82 (Institutional Loans), 90 (Outside Scholarships), 91 (Outside Grants), 92 (Outside Parent Loans), and 93 (Outside Student Loans) may represent more than one financial aid program. **If you report more than one disbursed amount (AID018) for any of these award identifiers (AID016), you must report the award name (AID017)**

For example, when reporting institutional grants "College Grant" and "President Grant", the correct award identifier is 81. If you report two records with award identifier 81, the award name **is required** to identify each record. The award name is **not required** if you sum the amounts of College Grant" and "President Grant" and report one record with award identifier 81. If the student only received 1 institutional grant, such as "College Grant", you should also supply the award name to identify the distinct award.

In the case of the "Other" types of aid: 15 (Other State), 48 (Other Federal), 83 (Other Institutional), and 99 (Outside Other), the award name (AID017) is **mandatory**.

Instructions

Business Rules	Dependency
Mandatory entry Award Identifier = 99 (Other) may only be used if no other award identifier is valid (i.e., when reporting institutional grants "College Grant" and "President Grant", the correct award identifier is 81)	If Award Identifier = 0 (No Award), then Awarded Amount (AID015) must = 0 If Award Identifier = 0, then no other records should be submitted for that institution, year, student and term. I.e., if a student was eligible for, but received no aid, as indicated by Award ID = 0, there should not be another record for that student in which he/she received aid in the specified term.

AID017   Award Name

The name of the award funded.

Data Type Alphanumeric   **Length** Minimum 1   **Format Example**
                                      Maximum 32

Code Descriptions

Can be either upper case or mixed case

Definition

If Award Identifier (AID016) = 15 (Other State)
                   (AID016) = 48 (Other Federal)
                   (AID016) = 83 (Other Institutional)
                   (AID016) = 99 (Other)
Award Name (AID017) must be populated

If Award Identifier (AID016) = 80 (Institutional Scholarships)
                   (AID016) = 81 (Institutional Grants)
                   (AID016) = 82 (Institutional Loans)
                   (AID016) = 90 (Outside Scholarships)
                   (AID016) = 91 (Outside Grants)
                   (AID016) = 92 (Outside Parent Loans)
                   (AID016) = 93 (Outside Student Loans)
Award Name (AID017) must be populated if the awards are not aggregated together

Instructions

Business Rules	Dependency
Must be null if not Other (15, 48, 83, 99) or Institutional/Outside Aid (80, 81, 82, 90, 91, 92, 93) **Mandatory entry if Award Identifier (AID016) = Other: 15 (State), 48 (Federal), 83 (Institutional) or 99 (Other)**	**See above for specific conditions**

AID018   Disbursed Amount

The student's disbursed amount for the Term (AID003) being reported and specified by
Award Identifier (AID016).

Data Type: Numeric   **Length** Minimum 1   **Format Example** 500

Maximum 6

Code Descriptions

If a student applied for and was eligible for financial aid but received none, enter 0.

If a student applied for and was either not eligible or did not complete an application, enter 0.

Definition

Instructions

Business Rules	Dependency
Mandatory entry Null values results in file rejection	

AID019 **Tuition and Mandatory Fees**

The student's tuition and mandatory fees amount for the Term (AID003) being reported.

Data Type: Numeric **Length** Minimum 1 **Format Example** 5500

Maximum 6

Code Descriptions

Supply the mandatory tuition and fees (not including room and board) that the student paid for the given term.

Definition

Instructions

Business Rules	Dependency
Mandatory entry for all students Tuition and Mandatory Fees should be the same for a given student, institution, fiscal year and term.	

AID020   Books and Supplies

The student's books and supplies amount for the Term (AID003) being reported.

Data Type: Numeric	**Length** Minimum 1 Maximum 6	**Format Example** 1500

Code Descriptions

Supply the budgeted books and supplies amount that a student would pay for the given term.

Definition

Instructions

Business Rules	Dependency
Mandatory entry for all students Books and Supplies should be the same for a given student, institution, fiscal year and term.	

AID021   Insurance

The student's health insurance amount for the Term (AID003) being reported.

Data Type: Numeric	**Length**	Minimum 1 Maximum 6	**Format Example** 5500

Code Descriptions

Supply the student insurance amount that the student paid if he/she took health insurance through the institution.

Definition

Instructions

Business Rules	Dependency
Mandatory entry for all students Insurance should be the same for a given student, institution, fiscal year and term.	

AID022   Completed Application by Deadline

Indicates whether the student completed the application by the institution's published priority deadline.

Data Type: Alphanumeric	**Length** Minimum 1 Maximum 1	**Format Example** N

Code Descriptions

N   Student did not complete the financial aid application by the published deadline
Y   Student did complete the financial aid application by the published deadline

Definition

Instructions: Enter Y: If your institution has no priority deadline

Business Rules	Dependency
Mandatory entry	If AID022 = 'Y' and AID023 = 'Y' and AID024 = 'Y' then AID012 must equal 'Y'.
Completed Application by Deadline must be the same for a given student, institution and fiscal year	If AID022 = 'N' or AID023 = 'N' or AID024 = 'N' then AID012 must equal 'N'.

AID023   Met Academic Requirements

Indicates whether the student met all of the institutional academic program requirements.

Data Type: Alphanumeric   **Length** Minimum 1   **Format Example** N
                                          Maximum 1

Code Descriptions

N   Student did not meet all the institutional academic program requirements
Y   Student did meet all the institutional academic program requirements

Definition

Instructions

Business Rules	Dependency
Mandatory entry	If AID022 = 'Y' and AID023 = 'Y' and AID024 = 'Y' then AID012 must equal 'Y'.
Met Academic Requirements must be the same for a given student, institution, fiscal year	If AID022 = 'N' or AID023 = 'N' or AID024 = 'N' then AID012 must equal 'N'

AID024   Met Title IV Requirements

Indicates whether the student met all financial aid eligibility requirements for Title IV and
State need-based aid.

Data Type: Alphanumeric   **Length** Minimum 1   **Format Example** N
                                       Maximum 1

Code Descriptions

N   Student did not meet all financial aid eligibility requirements for Title IV and State need-
based aid
Y   Student did meet all financial aid eligibility requirements for Title IV and State need-
based aid

Definition

Instructions

Business Rules	Dependency
Mandatory entry	If AID022 = 'Y' and AID023 = 'Y' and AID024 = 'Y' then AID012 must equal 'Y'.
Met Title IV Requirements must be the same for a given student, institution, fiscal year	If AID022 = 'N' or AID023 = 'N' or AID024 = 'N' then AID012 must equal 'N'

AID025   Withdrew Indicator

Indicates whether the student withdrew (officially or unofficially) or was dismissed during the semester.

Data Type: Alphanumeric   **Length** Minimum 1   **Format Example** N
Maximum 1

Code Descriptions

N   Student did not withdraw during the semester.
Y   Student withdrew (officially or unofficially) or was dismissed during the semester

Definition

Instructions

Business Rules	Dependency
Mandatory entry	
Withdrew Indicator must be the same for a given student, institution, fiscal year and term	