

**Minutes from the Joint IR Advisory Committee Meeting
October 10, 2006**

Attendees

Alan Mettling – Barton County Community College
Lee Allard – Butler Community College
G. Susie Edwards – Butler Community College
Connie Finger – Butler Community College
Lisa Kirmer – Flint Hills Technical College
Mike Tonn – Hutchinson Community College
Pat Sumner – Johnson County Community College
Sandra McGill – Kansas City Kansas Area Technical School
Mary Lawless – Kansas City Kansas Area Technical School
Sue Sanford – Kansas City Kansas Area Technical School
Donna Shawn – Kansas City Kansas Area Technical School
Larry Moeder – Kansas State University
David Warren – Kansas State University
Tammy Parsons – Kaw Area Technical School
Linda Wilson – Kaw Area Technical School
Richard Fogg – Manhattan Area Technical College
Judy Heidrick – North Central Kansas Technical College
Gary Odle – North Central Kansas Technical College
Amy Dulac – Northeast Kansas Technical College
Ryan Cherland – University of Kansas
Melodie Christal – Washburn University
Larry Bunce - Wichita Area Technical School
Colleen Denney – Kansas Board of Regents
Rita Johnson – Kansas Board of Regents
Diane Lindeman – Kansas Board of Regents
Kathyrne Mueller – Kansas Board of Regents
Lina Ossiander – Kansas Board of Regents
Dawn Ressel – Kansas Board of Regents

The Joint IR Advisory Committee Meeting was held on Tuesday, October 10, 2006 from 10:00 am to 12:00 pm in the Board Room at the Kansas Board of Regents office. The topic of the meeting was development of a Financial Aid module as part of the Kansas Postsecondary database (KSPSD). IR Advisory Committee members were encouraged to invite Student Financial Aid representatives from their campuses, as appropriate. Several Financial Aid representatives did attend.

Dawn Ressel set the stage for the discussion by explaining why KBOR IR is seeking to create a financial aid module as part of the Kansas Postsecondary database (KSPSD). The addition of a financial aid module is an intentional deviation from the KSPSD strategic plan, driven by the need to address the many concerns raised in this era of

increasing tuition rates. When Kansas public postsecondary institutions are under-funded by the legislature, tuition rates increase, as does public concern about high tuition. The intent is to develop a financial aid module that will contain the information necessary to answer these concerns and to argue for increased funding.

Some prospective uses for financial aid module data reporting:

- show that although tuition rates have increased, much of that money is going into scholarships to help students with financial need; as an example, we would want to be able to show something like “although tuition increased by 10%, after we account for all the aid pieces, the average student is actually only paying 2% more”
- help understand the impact of student loans – how much debt do our students have to incur to attend our institutions?
- help determine the potential impact of proposed changes in Pell grants
- help determine how much money students are really taking out of their own pockets to attend our institutions

The key to making financial aid data useful is being able to get at a reasonably accurate **net cost of attendance**. The proposed data elements included in this collection were taken from a SHEEO survey that was distributed to the states. They reflect data elements that are commonly collected in various states.

Proposed timeline for Financial Aid Module implementation

Time Frame	Stage	Description	Who Is Involved?
Fall 2006	development	data elements, definitions, collection periods	IR Advisory Committee, Financial Aid Representatives, and KBOR staff
Early spring 2007	development	database structure and functionality	KBOR IR
Mid/Late spring 2007	review	database, web interface reviewed and tested for agreed-upon functionality	IR Advisory Committee, Financial Aid Representatives, and KBOR staff
Collection cycle for 2007 academic year	pilot collection	optional submission to KSPSD website	Institutional users
Collection cycle for 2008 academic year	live collection	required submission to KSPSD website	Institutional users

Proposed Data Elements and Definitions

Details for each data element and definition are included in **Appendix 1**. The following issues were discussed:

How to determine the actual cost to the student:

It was determined that we will need the following pieces of data to determine the actual net amount the student must pay to attend college:

1. total cost of attendance
2. actual tuition dollars charged
3. financial aid received

How to determine total cost of attendance:

It was agreed that it to make this data useful, we really need to be able to determine the “Total Cost of Attendance”. This includes tuition and fees, room and board, books and supplies, etc. Total Cost of Attendance less Financial Aid will be the true cost to the student, which is what this module will need to show.

The actual amount charged for tuition and fees shows up in the Student Account, and is generally available through the Accounts Receivable portion of the SIS. This data will reflect withdrawals, and will be more accurate than the estimated tuition and fees on which financial aid is based (more below).

Actual amounts for the remaining elements in the Total Cost of Attendance are generally not available. The most feasible way of capturing an estimate of these costs is by using the information on which the student’s financial aid award is based.

It was decided to collect the following pieces of information from the Student Financial Aid record:

- Estimated Cost of Attendance will be broken out into four fields:
 1. Financial Aid Package - Tuition and Fees
 2. Financial Aid Package - Room and Board
 3. Financial Aid Package - Books and Supplies
 4. Financial Aid Package - Miscellaneous (differs by institution, includes everything else in the student budget, including “Personal” and “Transportation”)
- This information will reflect the data on which the student’s financial aid award was based.
- Before the year starts, students estimate how many terms they will attend. FAFSA is based on this. But over the course of the year, the student may change or completely withdraw. Generally, the financial aid records are updated throughout the year to reflect these changes. **Data collected should reflect information as of the end of the student’s financial aid year.**

- Cost of attendance figures on which the FAFSA is based can't really be broken out by term. For Banner schools, the summer term is combined with Fall or Spring. These four fields will have to be collected as total amount for the year.

How to determine actual tuition dollars charged

- Actual tuition dollars charged the student is shown in the Student Account. SIS Accounts Receivable modules can be used to get this information.
- Tuition is charged by term. We should collect this information by term. For example, if a student attended Fall, Spring, and Summer terms, there should be three separate tuition charges for the year for that student.
- Collecting by term will be the key as to how much time the total cost of attendance figures cover. We could then find a monthly cost.

How to determine financial aid received?

- Most of the financial aid information will mirror information collected in the IPEDS Financial Aid survey. It will be submitted as annual totals, not by term.

How will we put it all together?

- It was noted that looking at the entire year (rather than SU/FA/SP terms individually) is a valid viewpoint, and one that is in sync with how Financial Aid is awarded. However, Financial Aid offices generally operate on a trailing summer year (FA/SP/SU). KSPSD collections are based on a leading summer year (SU/FA/SP). To account for this mismatch, we should collect the student account (A/R) data by term. This will allow the students to be matched back to KSPSD. We can come to an average monthly cost by counting the number of terms for which the student is submitted.
- Technical institutions will submit according to the same "Reporting Period" rules as for the KSPSD Academic Year collection (i.e., submit one record per student and use 'AY' reporting term for the entire year if students register for an entire program, rather than registering class-by-class).
- Each student will have one record for each term attended - showing the actual tuition charged. That will tell us how many months (or what percentage) of the year the student attended.
- We can divide those figures that are submitted as a yearly total (total cost of attendance, grants, loans) by the number of months attended to arrive at a monthly actual cost to the student (or annualize the amount using the percentage).
- There are going to be situations where comparing the FAFSA cost to the A/R tuition is not going to give the correct picture, and we have to watch for those. Possibly they could be flagged as Warnings in the edit report.
 - Example: A/R would reflect refunds for dropped courses, but the Financial Aid cost would not. And often tuition amounts are refunded according to a graduated schedule as to how far along in the course the student was.
 - There could be post withdrawal disbursements, where very little tuition was assessed, but aid was disbursed.

Number of Files

Since most of the data collected will be a total for the year, but the Actual Tuition and Fees Charged will be for the individual term, there was discussion as to whether this should be a one file or two file collection.

- **Single File Option:** If the collection is just one single file, there will be duplication of yearly total information on each row, when a student attends more than one term during the year.
 - There will be one record per student per term attended
 - Actual Tuition and Fees Charged will be populated with data relevant to **that term only**. This field comes from the student account information.
 - Other fields will be populated with an annual total, and the values will be repeated for each term submitted for a single student.
 - Fields based on FAFSA information will be blank for those students who did not apply for financial aid.
- **Two File Option:** This would work much like the files in the KSPSD Academic Year collection.
 - One file would contain one record for each student **for each term attended**. This file would contain Student Account (A/R) information for all students.
 - The second file would contain a single record for each student that applied for or received Financial Aid. Totals would reflect activity for the entire year.
- It was decided that the **single file** option made the most sense, for now. We will work under that assumption, but can change if the need arises.
- **Appendices 2-A through 2-C show a sample of how both options might be populated.**

Changes in Proposed Data Elements

- In order to link the Financial Aid data to other student records in KSPSD, there may be a need for identifying fields, in addition to SSN. The SSN used when a FAFSA is first submitted never changes. But students can and do change the data submitted to the SSN field in the SIS. The inclusion of the following fields would be helpful: Last Name, First Name, Middle Initial, Sex, Date of Birth
- We will add a data element to indicate whether the Summer Term data is leading or trailing.
- We will add a data element to indicate whether the student applied for financial aid. This will indicate whether or not we can expect entries in the ISIR-based fields.
- Instead of having the two fields “Private Financial Aid” and “Other Financial Aid”, we will combine them into one field “Other Financial Aid”. Private aid will be included here.
- Work-Study aid was discussed. Federal work-study can be part of the Federal Financial Aid Package, so would likely be relevant to this data collection. KBOR IR will further research.

(NOTE: Post-meeting research indicated that Federal Work-Study, as well as Kansas Work-Study, should be included in this collection as forms of financial aid. The fields have been included in the proposed list of data elements. The Kansas Work-Study program is only available to students at the State Universities and Washburn University.)

(NOTE: Post-meeting research indicated that adding the field **Private Loans, as a subset of the “Loan” field** may provide valuable information about sources of funding. **Private Loans** are known as “Signature Loans” or “Alternative Loans”. Quantifying Private Loans as a separate data element could highlight unmet need, showing where students turn when traditional aid falls short. This field has been added to the list of proposed data elements.)

How to Report Waivers

- Waivers should be included in the “Institutional Grants” field. This is the same as IPEDS reporting.
- Only report waivers if the actual tuition amount is charged and then the amount due is reduced by the waiver. Do not include if the “waiver” just acts to reduce the amount of tuition charged (this would cause double-counting).
- Some types of waivers that would be included here:
 - Employee
 - Student – GPA
 - Student – Out of State (agreement between states)
 - Faculty exempt
 - Resident

Campus Residency

- This data would come from the financial aid application (ISIR record). It is the student’s “best guess” at the time they fill out the FAFSA.
- Residency status often changes; recognize that this is not necessarily what actually happened.
- But it will provide value in that it is what the financial aid award is based on.
- This field will allow us the ability to look at the data in a different fashion – will be able to show which categories of students receive which types of financial aid.

Federal Grants

- Includes the new ACG (Academic Competitiveness) grants.
- Includes the new SMART (National Science and Mathematics Access to Retain Talent) grants.

Assistantships

- There were questions as to whether we wanted to count actual income earned; whether that will help answer the question true out-of-pocket cost.
- If assistantship salaries are included, maybe undergraduate work-study should be included too? The Financial Aid award does consider that.
- But that opens the door to all types of earnings.
- KBOR I/R will further research this field.

(NOTE: Post-meeting research indicated that there would not be a need for this information in the types of analysis and reporting the Financial Aid Module is being designed to provide. This information is available in aggregate from other sources, should the need to use it arise. This data element will not be part of the Financial Aid Module collection)

Other Financial Aid

- Includes Bureau of Indian Affairs aid.
- Includes aid to international students whose embassies pay the tuition.

When should the data collection occur?

- Collection is always a look back.
- The intention is to have reporting from this data available at the time of year tuition increase discussions reach the Board level – which would be around May. The intention is to be able to rebut concern about tuition increases with data showing actual increase amounts “felt” by students after financial aid is applied.
- KBOR IR needs enough time to be able to collect the data, create and analyze reports, send reports out for institutional review, make changes or corrections that come out of the review.
- The IPEDS Financial Aid collection, which collects the same type of data at an aggregate level, occurs in the spring. That is too late for this module’s intended use.
- For schools where summer is a trailer, Financial Aid data is finalized by the beginning of October (when FISAP is due). So that is the earliest the data would be finalized.
- Financial Aid representatives would likely be the ones doing much of the work for this collection. The slowest time in financial aid offices is November and December. But IR people will be involved too – to ensure that the right students are being reported on. Fall is the worst time for IR people.
- KBOR IR could start the file by pulling identifying information from the most recent KSPSD Enrolled Hours collection. This would at least let institutions know which students we expect to see in the Financial Aid collection.
 - Some institutions would find this helpful, others would not have a need for this service.
- KBOR IR is moving toward less restrictive collection periods for all project collections, so something like a collection period of October 1 – December 31 is possible, and best meet the needs of both Financial Aid and IR people.

Next meeting

Tuesday, December 5, 2006, from 10:00 AM – 12:00 PM was selected as the date and time of the next meeting, but this meeting is **tentative**. As work on this project progresses, we will come to a consensus as to whether the meeting is necessary.

Appendix 1
KSPSD Financial Aid Module
Proposed Fields and Definitions
Last Revision: November 6, 2006

	Field	Definition	Notes
1	SSN	Federally assigned Social Security Number (<i>KSPSD definition</i>)	
2	Student ID	Unique college assigned ID number (<i>KSPSD definition</i>)	
3	FICE Institution ID	Unique institutional FICE ID number (<i>KSPSD definition</i>)	
4	Term	Enter 'FN' for Financial Aid	
5	Term Year	Calendar year of the close of the academic year (<i>KSPSD definition</i>)	
6	First Name	Student's first name (<i>KSPSD definition</i>)	• Added per 10/10/06 IR Advisory Committee meeting
7	Last Name	Student's last name (<i>KSPSD definition</i>)	• Added per 10/10/06 IR Advisory Committee meeting
8	Middle Initial	Student's middle initial (<i>KSPSD definition</i>)	• Added per 10/10/06 IR Advisory Committee meeting
9	Sex Code	Enter the sex of the student (<i>KSPSD definition</i>)	• Added per 10/10/06 IR Advisory

		<p>Acceptable Values:</p> <ul style="list-style-type: none"> • F = Female • M = Male • X or blank = Unknown 	Committee meeting
10	Date of Birth	<p>Student's date of birth, if known. Format = YYYYMMDD (<i>KSPSD definition</i>)</p>	<ul style="list-style-type: none"> • Added per 10/10/06 IR Advisory Committee meeting
11	Reporting Period	<p>Reporting term of the record (<i>KSPSD definition</i>)</p> <p>Acceptable Values:</p> <ul style="list-style-type: none"> • SU = Summer • FA = Fall • SP = Spring • AY = Academic Year 	<ul style="list-style-type: none"> • Technical institutions follow same definition as KSPSD AY collection: submit one record for entire year and use "AY" value IF student enrolls once for an entire program (as opposed to enrolling in different classes each term)
12	Summer Flag	<p>Indicate whether the summer term you are reporting on is a leading or trailing summer.</p> <p>An academic year with a <u>leading</u> summer is measuring the year as SU + FA + SP. For example, the 2006 academic year with a leading summer would be SU-05 + FA-05 + SP-06.</p> <p>An academic year with a <u>trailing</u> summer is measuring the year as FA + SP + SU. For example, the 2006 academic</p>	<ul style="list-style-type: none"> • Added per 10/10/06 IR Advisory Committee meeting • Must be included for each record, regardless of Reporting Period (i.e., a record for the Fall term still must have an entry in this field)

		<p>year with a trailing summer would be FA-05 + SP-06 + SU-06.</p> <p>Acceptable Values:</p> <ul style="list-style-type: none"> • L = Leading summer • T = Trailing summer 	
13	Actual Tuition and Fees Charged	<p>Dollar amount of total tuition and fees charged to the student for the Reporting Period (SU, FA, SP, or AY).</p> <p>Include all amounts the student was assessed for enrolling in classes.</p> <p>Include items such as: on-line fees, lab fees, enrollment fees, student activity fees</p>	<ul style="list-style-type: none"> • This is the actual amount charged to the Student Account (Accounts Receivable)
14	State and Local Grants	<p>Dollar amount of state and local grants received by the student for the academic year and summer session.</p> <p>Include grants that were provided by your state such as Leveraging Educational Assistance Partnerships (LEAP) (formerly SSIGs). Also include merit scholarships that were provided by your state and tuition and fee waivers for which your institution was reimbursed by a state agency. Local grants would include any local government grants, scholarships or gift-aid that are awarded directly to the student. (<i>IPEDS definition</i>)</p>	<ul style="list-style-type: none"> • Reflects total for the entire year • Repeated value: if the student has multiple records, this value will be the same for each record
15	Institutional Grants	<p>Dollar amount of institutional grants received by the student for the academic year and summer session.</p>	<ul style="list-style-type: none"> • Tuition waivers are reported here • Reflects total for the entire year

		<p>Include scholarships and fellowships that were granted and funded by your institution and/or individual departments within your institution (and are limited to students attending your institution). Also include tuition and fee waivers granted by your institution (for which your institution is not reimbursed from another source). These would include scholarships targeted to certain groups of individuals (from a particular state or studying a certain subject) for which the institution designates the recipient; athletic scholarships; etc. DO NOT include College Work Study. (<i>IPEDS definition</i>)</p>	<ul style="list-style-type: none"> • Repeated value: if the student has multiple records, this value will be the same for each record
16	Total Loans	<p>Dollar amount of loan monies received by the student for the academic year and summer session.</p> <p>Loans include any monies that must be repaid to the lending institution for which the student is the designated borrower. Includes all Title IV subsidized and unsubsidized loans and all institutionally- and privately-sponsored loans. Does not include PLUS and other loans made directly to parents. (<i>IPEDS definition</i>)</p>	<ul style="list-style-type: none"> • Reflects total for the entire year • Repeated value: if the student has multiple records, this value will be the same for each record
17	Private Loans	<p>Dollar amount of private loan monies received by the student for the academic year and summer session.</p>	<ul style="list-style-type: none"> • Added per post-meeting research • Reflects total for the entire year • Repeated value: if the student has multiple records, this value will be the

		Include signature loans and alternative loans.	same for each record <ul style="list-style-type: none"> • This is a SUBSET of Total Loans (#16)
18	Other Financial Aid	Dollar amount of other financial aid received by the student for the academic year and summer session . Other financial aid includes aid from local businesses, civic groups, churches, benefactors, national organizations, professional associations, hobby groups, etc.	<ul style="list-style-type: none"> • Reflects total for the entire year • Repeated value: if the student has multiple records, this value will be the same for each record
19	ISIR Flag	Indicate whether the student has an ISIR record. Only students who completed the FAFSA (Free Application for Federal Student Aid) will have an ISIR record. Acceptable Values: <ul style="list-style-type: none"> • Y = Yes • N = No 	<ul style="list-style-type: none"> • Added per 10/10/06 IR Advisory Committee meeting • Repeated value: if the student has multiple records, this value will be the same for each record
THE FOLLOWING FIELDS, EXCEPT KANSAS WORK-STUDY EARNED (#28), ARE ONLY APPLICABLE IF ISIR FLAG = Y			
20	Campus Residency	Student's expected living location while attending classes, as indicated on the FAFSA. Acceptable Values:	<ul style="list-style-type: none"> • This is the residency status on which the student's financial aid package was based. It reflects the student's "best guess" at the time of FAFSA. It does not necessarily

		<ul style="list-style-type: none"> • ON = On Campus: student lives in institution-owned or controlled living quarters for students; includes dormitories, residence halls, or other facilities • OFF = Off Campus: student lives in non institution-owned housing, and does not live with parents or relatives • OFW = Off Campus With Family: student lives with parents or relatives 	<p>indicate where the student actually ended up living.</p> <ul style="list-style-type: none"> • Repeated value: if the student has multiple records, this value will be the same for each record • Only students who have applied for Federal Financial aid will have this data element
21	Dependency Status	<p>Financial dependency status of student as indicated on the FAFSA.</p> <p>Acceptable Values:</p> <ul style="list-style-type: none"> • IND = Independent • DEP = Dependent 	<ul style="list-style-type: none"> • This is the dependency status on which the student's financial aid package was based. It reflects the student's status at the time of FAFSA. It does not necessarily indicate the student's dependency status throughout, or at the end of, the year. • Repeated value: if the student has multiple records, this value will be the same for each record • Only students who have applied for Federal Financial aid will have this data element
22	Financial Aid Package - Total Tuition and Fees	<p>Dollar amount of tuition and fees included in the student budget on which financial aid package was based.</p> <p>Reflects values as of the end of the student's financial</p>	<ul style="list-style-type: none"> • Added per 10/10/06 IR Advisory Committee meeting • Reflects total for the entire year

		<p>aid year.</p> <p>Component of Total Cost of Attendance</p>	<ul style="list-style-type: none"> • Repeated value: if the student has multiple records, this value will be the same for each record • Only students who have applied for Federal Financial aid will have this data element
23	Financial Aid Package - Room and Board	<p>Dollar amount of room and board expenses included in the student budget on which financial aid package was based.</p> <p>Reflects values as of the end of the student's financial aid year.</p> <p>Component of Total Cost of Attendance</p>	<ul style="list-style-type: none"> • Added per 10/10/06 IR Advisory Committee meeting • Reflects total for the entire year • Repeated value: if the student has multiple records, this value will be the same for each record • Only students who have applied for Federal Financial aid will have this data element
24	Financial Aid Package - Books and Supplies	<p>Dollar amount of books and supplies expenses included in the student budget on which financial aid package was based.</p> <p>Reflects values as of the end of the student's financial aid year.</p> <p>Component of Total Cost of Attendance</p>	<ul style="list-style-type: none"> • Added per 10/10/06 IR Advisory Committee meeting • Reflects total for the entire year • Repeated value: if the student has multiple records, this value will be the same for each record • Only students who have applied for Federal Financial aid will have this data

			element
25	Financial Aid Package - Miscellaneous Expenses	<p>Dollar amount of any other items your institution includes in the student budget on which financial aid package was based.</p> <p>Includes items such as: transportation, miscellaneous expenses, and personal expenses.</p> <p>Reflects values as of the end of the student's financial aid year.</p> <p>Component of Total Cost of Attendance</p>	<ul style="list-style-type: none"> • Added per 10/10/06 IR Advisory • Reflects total for the entire year • Repeated value: if the student has multiple records, this value will be the same for each record • Only students who have applied for Federal Financial aid will have this data element
26	Federal Grants	<p>Dollar amount of federal grants received by the student for the academic year and summer session.</p> <p>Federal grants are grants provided by federal agencies such as the U.S. Department of Education, including Title IV Pell Grants and <u>Supplemental Educational Opportunity Grants (SEOG)</u>. Also includes need-based and merit-based educational assistance funds and training vouchers provided from other federal agencies and/or federally-sponsored educational benefits programs, including the <u>Veteran's Administration</u>, Department of Labor, and other federal agencies. (<i>IPEDS definition</i>)</p> <p>Include new federal grants (ACG, SMART)</p>	<ul style="list-style-type: none"> • Reflects total for the entire year • Repeated value: if the student has multiple records, this value will be the same for each record • Only students who have applied for Federal Financial aid will have this data element

27	Federal Work-Study Earned	<p>Dollar amount of funds earned through the Federal Work-Study program for the academic year and summer session.</p> <p>Federal Work-Study (FWS) provides part-time jobs for undergraduate and graduate students with financial need, allowing them to earn money to help pay education expenses.</p> <p>Do not report earnings from part-time jobs or other sources that are NOT part of the FWS program.</p>	<ul style="list-style-type: none"> • Added per 10/10/06 IR Advisory Committee meeting • Reflects actual total earned for the entire year • Repeated value: if the student has multiple records, this value will be the same for each record • Only students who have applied for Federal Financial aid will have this data element
THE FOLLOWING FIELD IS REQUIRED FOR STATE UNIVERSITIES AND WASHBURN UNIVERSITY ONLY			
28	Kansas Work-Study Earned	<p>Dollar amount of funds earned through the Kansas Work-Study program for the academic year and summer session.</p> <p>Kansas Work-Study (KWS) is a state subsidized program intended to provide employers incentive to hire Kansas University students in career-related positions by reimbursing employers for one-half of the eligible student employee's salary.</p> <p>Do not report earnings from part-time jobs or other sources that are NOT part of the KWS program.</p>	<ul style="list-style-type: none"> • Added per 10/10/06 IR Advisory Committee meeting • Reflects actual total earned for the entire year • Repeated value: if the student has multiple records, this value will be the same for each record
FIELD REMOVED Assistantships		<p>Dollar amount received by the student during the reporting period for assistantships</p> <p>Assistantships are study grants of financial aid offered to</p>	<ul style="list-style-type: none"> • Field removed per 10/10/06 IR Advisory Committee meeting

		the student in exchange for graduate level teaching, research, or other services.	
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Appendix 2 - A				
KSPSD Financial Aid Module				
Detail for Students on Sample Tables				
Student A	Description			
	Did apply for federal aid			
	Attended 3 terms			
	Took 3 less credit hours in Spring than expected			
	Financial Aid Budgeted Amount			
	Tuition & Fees	\$ 5,250	$(36 \text{ credit hr} * \$120/\text{Hour} = 4,320) + (3 \text{ terms} * \$310 \text{ fee} = 930) = \$5,250$	
	Room & Board	4,900		
	Books & Supplies	1,500		
	Other Expenses	2,900		
	Funding Received			
	Kansas State scholarship	800		
	Rotary Club scholarship	500		
	Pell Grant	3,000		
	FSEOG	1,000		
	Kansas Work-Study earned	500		
	Perkins loan	4,000		
	Stafford loan	2,500		
	Actual Tuition & Fees Charged			
	Actual Tuition & Fees - Fall	2,110	$(15 \text{ credit hr} * \$120/\text{Hour} = 1,800) + (1 \text{ term} * \$310 \text{ fee} = 310) = \$2,110$	
	Actual Tuition & Fees - Spring	1,750	$(12 \text{ credit hr} * \$120/\text{Hour} = 1,440) + (1 \text{ term} * \$310 \text{ fee} = 310) = \$1,750$	
	Actual Tuition & Fees - Summer	1,030	$(6 \text{ credit hr} * \$120/\text{Hour} = 720) + (1 \text{ term} * \$310 \text{ fee} = 310) = \$1,030$	
Student B	Description			
	Did not apply for federal aid			
	Attended 3 terms			
	Funding Received			
	None			
	Actual Tuition & Fees Charged			
	Actual Tuition & Fees - Fall	2,110	$(15 \text{ credit hr} * \$120/\text{Hour} = 1,800) + (1 \text{ term} * \$310 \text{ fee} = 310) = \$2,110$	
	Actual Tuition & Fees - Spring	2,470	$(18 \text{ credit hr} * \$120/\text{Hour} = 2,160) + (1 \text{ term} * \$310 \text{ fee} = 310) = \$2,470$	
	Actual Tuition & Fees - Summer	670	$(3 \text{ credit hr} * \$120/\text{Hour} = 360) + (1 \text{ term} * \$310 \text{ fee} = 310) = \670	
Student C	Description			
	Did not apply for federal aid			
	Attended 3 terms			

	Funding Received		
	Institutional Waiver - Family Employee	2,625	
	Actual Tuition & Fees Charged		
	Actual Tuition & Fees - Fall	2,110	$(15 \text{ credit hr} * \$120/\text{ Hour} = 1,800) + (1 \text{ term} * \$310 \text{ fee} = 310) = \$2,110$
	Actual Tuition & Fees - Spring	2,470	$(18 \text{ credit hr} * \$120/\text{ Hour} = 2,160) + (1 \text{ term} * \$310 \text{ fee} = 310) = \$2,470$
	Actual Tuition & Fees - Summer	670	$(3 \text{ credit hr} * \$120/\text{ Hour} = 360) + (1 \text{ term} * \$310 \text{ fee} = 310) = \670
Student D	Description		
	Did apply for federal aid		
	Attended 2 terms (SP & SU)		
	Took same amount of cr hrs as budgeted		
	Financial Aid Budgeted Amount		
	Tuition & Fees	1,440	$(24 \text{ credit hr} * \$39) + (24 \text{ credit hr} * \$21) = \$1,440$
	Room & Board	2,800	
	Books & Supplies	650	
	Other Expenses	400	
	Funding Received		
	Pell Grant	2,000	
	Federal Work-Study earned	1,200	
	Perkins loan	1,000	
	Actual Tuition & Fees Charged		
	Actual Tuition & Fees - Spring	1,080	$(18 \text{ credit hr} * \$39) + (18 \text{ credit hr} * \$21) = \$1,080$
	Actual Tuition & Fees - Summer	360	$(6 \text{ credit hr} * \$39) + (6 \text{ credit hr} * \$21) = \$360$
Student E	Description		
	Did apply for federal aid		
	Completed 1 Year Vocational Program		
	Institution uses leading summer		
	Financial Aid Budgeted Amount		
	Tuition & Fees	2,721	
	Room & Board	1,080	
	Books & Supplies	130	
	Other Expenses (Tools)	2,200	
	Funding Received		
	Pell Grant	2,000	
	Perkins loan	2,000	
	Kansas Vocational scholarship	500	
	Actual Tuition & Fees Charged		
	Cost of program	2,721	

Appendix 2 - B
 KSPSD Financial Aid Module
 Sample Table: One-File Option

Example Student	Record Number	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	Univ Only 28
		SSN	Student ID	FICE ID	Term	Year	First Name	Last Name	Middle Initial	Sex Code	Date of Birth	Reporting Period	Summer Flag	Term Tuition & Fees Charged	State and Local Grants	Institutional Grants	Federal Loans	Private Loans	Other Financial Aid	ISIR Flag	Campus Residency	Dependency Status	Budgeted Tuition & Fees	Budgeted Room and Board	Budgeted Books and Supplies	Budgeted Other Expenses	Federal Grants	Federal Work-Study Earned	Kansas Work-Study Earned
A	1	123456789	KS0009876	1999	FN	2006	Mary Anderson	P	F	19800404	FA	T	2,110	800	-	6,500	-	500	Y	ON	DEP	5,250	4,900	1,500	2,900	4,000	-	500	
A	2	123456789	KS0009876	1999	FN	2006	Mary Anderson	P	F	19800404	SP	T	1,750	800	-	6,500	-	500	Y	ON	DEP	5,250	4,900	1,500	2,900	4,000	-	500	
A	3	123456789	KS0009876	1999	FN	2006	Mary Anderson	P	F	19800404	SU	T	1,030	800	-	6,500	-	500	Y	ON	DEP	5,250	4,900	1,500	2,900	4,000	-	500	
B	4	234567891	KS0009309	1999	FN	2006	Steve Parker	M	M	19830707	FA	T	2,110	-	-	-	-	-	N									-	
B	5	234567891	KS0009309	1999	FN	2006	Steve Parker	M	M	19830707	SP	T	2,470	-	-	-	-	-	N									-	
B	6	234567891	KS0009309	1999	FN	2006	Steve Parker	M	M	19830707	SU	T	670	-	-	-	-	-	N									-	
C	7	234567891	KS0009309	1999	FN	2006	James Wilson	M	M	19831010	FA	T	2,110	-	2,650	-	-	-	N									-	
C	8	234567891	KS0009309	1999	FN	2006	James Wilson	M	M	19831010	SP	T	2,470	-	2,650	-	-	-	N									-	
C	9	234567891	KS0009309	1999	FN	2006	James Wilson	M	M	19831010	SU	T	670	-	2,650	-	-	-	N									-	
D	10	345678912	10233298	1998	FN	2006	Lenora Jones	F	F	19810505	SP	T	1,080	-	-	1,000	-	-	Y	OFF	IND	1,440	2,800	650	400	2,000	1,200	-	
D	11	345678912	10233298	1998	FN	2006	Lenora Jones	F	F	19810505	SU	T	360	-	-	1,000	-	-	Y	OFF	IND	1,440	2,800	650	400	2,000	1,200	-	
E	12	456789123	90882	19889	FN	2006	Ryan Smith	A	M	19820303	AY	L	2,721	500	-	2,000	-	-	Y	OFW	DEP	2,721	1,080	130	2,200	2,000	-	-	

Appendix 2 - C
 KSPSD Financial Aid Module
 Sample Table: Two-File Option

File #1 - Identifying and A/R Info
 All students
 One record per student per term attended

Example Student	Record Number	1	2	3	4	5	6	7	8	9	10	11	12	13
		SSN	Student ID	FICE ID	Term	Year	First Name	Last Name	Middle Initial	Sex Code	Date of Birth	Reporting Period	Summer Flag	Term Tuition & Fees Charged
A	1	123456789	KS0009876	1999	FN	2006	Mary	Anderson	P	F	19800404	FA	T	2,110
A	2	123456789	KS0009876	1999	FN	2006	Mary	Anderson	P	F	19800404	SP	T	1,750
A	3	123456789	KS0009876	1999	FN	2006	Mary	Anderson	P	F	19800404	SU	T	1,030
B	4	234567891	KS0009309	1999	FN	2006	Steve	Parker		M	19830707	FA	T	2,110
B	5	234567891	KS0009309	1999	FN	2006	Steve	Parker		M	19830707	SP	T	2,470
B	6	234567891	KS0009309	1999	FN	2006	Steve	Parker		M	19830707	SU	T	670
C	7	234567891	KS0009309	1999	FN	2006	James	Wilson		M	19831010	FA	T	2,110
C	8	234567891	KS0009309	1999	FN	2006	James	Wilson		M	19831010	SP	T	2,470
C	9	234567891	KS0009309	1999	FN	2006	James	Wilson		M	19831010	SU	T	670
D	10	345678912	10233298	1998	FN	2006	Lenora	Jones		F	19810505	SP	T	1,080
D	11	345678912	10233298	1998	FN	2006	Lenora	Jones		F	19810505	SU	T	360
E	12	456789123	90882	19889	FN	2006	Ryan	Smith	A	M	19820303	AY	L	2,721

File #2 - Financial Aid Budgeted and Received
 Only students who applied for and/or received aid
 Record reflects total for year

Example Student	Record Number	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	Univ Only 20
		SSN	Student ID	FICE ID	Term	Year	State and Local Grants	Institutional Grants	Federal Loans	Private Loans	Other Financial Aid	ISIR Flag	Campus Residency	Dependancy Status	Budgeted Tuition & Fees	Budgeted Room and Board	Budgeted Books and Supplies	Budgeted Other Expenses	Federal Grants	Federal Work-Study Earned	Kansas Work-Study Earned
A	1	123456789	KS0009876	1999	FN	2006	800	-	6,500	-	500	Y	ON	DEP	5,250	4,900	1,500	2,900	4,000	-	500
C	2	234567891	KS0009309	1999	FN	2006	-	2,650	-	-	-	N									-
D	3	345678912	10233298	1998	FN	2006	-	-	1,000	-	-	Y	OFF	IND	1,440	2,800	650	400	2,000	1,200	-
E	4	456789123	90882	19889	FN	2006	500	-	2,000	-	-	Y	OFW	DEP	2,721	1,080	130	2,200	2,000	-	-