

# Data Dictionary for Experimental Sites Reporting Tool

## Award Year 2009-2010

### Tips on Navigating the Reporting Tool

#### Demographics Sheet

1. Institution

The full name of your institution.

2. Eight-digit OPEID

The full and complete OPEID for your institution. If you are reporting from and for your main campus, the final two digits of your OPEID will be "00". Subsequently, please provide data for the campus corresponding to this OPEID only.

3. Excluding students who benefited from PLUS loans only, the unduplicated total number of Title IV aid recipients for 2009-2010.

Total number of students who received Title IV Aid at your institution for the 2009-2010 award year. If a student received aid in more than one period (semester, trimester, etc.) during the 2009-2010 award year, count them only once. If the student benefited from PLUS loans only, and no other forms of Title IV aid, *do not* include them in your unduplicated count.

4. Excluding PLUS loans, the total Title IV volume of aid for 2009-2010.

The total dollar volume of Title IV aid provided to students at your institution for the 2009-2010 award year. Do not include PLUS loans.

5. Excluding students who benefited from PLUS loans only, the unduplicated total number of FFEL/Direct Stafford loan borrowers for award year 2009-2010.

Total number of students who received FFEL/Direct Stafford loans at your institution for the 2009-2010 award year. If a student received separate loans in more than one period (semester, trimester, etc.) during the 2009-2010 award year, count them only once. If the student benefited from PLUS loans ONLY, and no other form of FFEL/Direct lending, *do not* include them in your unduplicated count. The count you report here cannot exceed the value you reported for question 3.

6. Excluding PLUS loans, the total FFEL/Direct Stafford loan volume for award year 2009-2010.

The total dollar volume of FFEL/Direct Stafford loans benefiting students at your institution for the 2009-2010 award year. *Do not* include the dollar volume of PLUS loans. The value you report here, in sum with the values you report for questions 8 and 10 of this sheet, cannot exceed the value you reported for question 4.

7. Excluding PLUS loans, the total ACG/SMART grant volume for award year 2009-2010.

The total dollar volume of ACG/SMART grants benefiting students at your institution for the 2009-2010 award year.

8. Unduplicated total number of Pell recipients for award year 2009-2010.

Total number of students who received Pell Grants at your institution for the 2009-2010 award year. If a student received separate Pell Grants in more than one period (semester, trimester, etc.) during the 2009-2010 award year, count them only once. The count you record for this question cannot exceed that which you reported for question 3.

9. Total Pell volume for award year 2009-2010.

The total dollar volume of Pell Grants benefiting students at your institution for the 2009-2010 award year. If a student received separate Pell Grants in more than one period (semester, trimester, etc.) during the 2009-2010 award year, sum the dollar volume of the individual Pell Grants. The value you report here, in sum with the values you report for questions 6 and 10 of this sheet, cannot exceed the value you reported for question 4.

10. Unduplicated total number of campus-based aid recipients for award year 2009-2010.

The total number of individuals receiving campus-based aid at your institution in award year 2009-2010. Count each recipient only once, regardless of how many separate awards they may have received in award year 2009-2010. The count you record for this question cannot exceed that which you reported for question 3.

11. Total campus-based aid volume for award year 2009-2010.

The total dollar volume of campus-based aid at your institution in award year 2009-2010. If a student received separate awards in more than one period (semester, trimester, etc.) during the 2009-2010 award year, sum the dollar volume of the individual awards. The value you report here, in sum with the values you report for questions 6 and 8 of this sheet, cannot exceed the value you reported for question 4.

12. Institution's official 2008 cohort default rate.

Your institution's official cohort default rate for 2008.

13. Name of Experimental Sites Coordinator.

The name of the Experimental Sites Initiative Coordinator at your institution.

14. Email address of Experimental Sites Coordinator.

The business email address of the Experimental Sites Initiative Coordinator at your institution.

### **Loan Proration**

1. In order for your experiment to be deemed successful you must provide evidence in the text box below that addresses how the experiment at your school satisfied the 3 criteria for success specified in the recent technical amendments to the HEOA:

- How did the experiment reduce administrative burden?
- How did the experiment avoid creating additional costs to the taxpayers?
- How did the experiment improve delivery services or otherwise benefit students?

Please provide as much detail as possible and if possible quantitative (numeric) evidence in responding to each of the three questions. According to the technical amendments the Secretary will need this information in order to determine if the experiment has been a success at your institution.

2. Number of students who could have been subject to loan proration **in their graduating term** during award year 2009-2010.

The count of students who, in their graduating term during award year 2009-2010, *could* have been subject to loan proration. Thus, include in your sum students in their graduating term who did have their loans prorated as well those who, under the conditions of this experiment, did not have their loans prorated. The count you report here cannot exceed the value you reported for question 5 of the demographic worksheet.

2a. Number of students in 2) whose loans were prorated.

The count of students who, in their graduating term during award year 2009-2010, *did have their loans prorated*. The value you report here, in sum with the value you report for question 2b of this sheet, cannot exceed the value you reported for question 2.

2a1. Number of students in 2a receiving four-year degrees.

The count of students who, in their graduating term during award year 2009-2010, *did have their loans prorated* and received a traditional four-year degree (B.S., B.A., etc.). The value you report here, in sum with the values you report for questions 2a2, 2a3 and 2a4 of this sheet, cannot exceed the value you reported for question 2a.

2a2. Number of students in 2a receiving other degrees (A.A, technical, etc.).

The count of students who, in their graduating term during award year 2009-2010, *did have their loans prorated* and received a non-traditional degree (A.A, technical, etc.). The value you report here, in sum with the values you report for questions 2a1, 2a3 and 2a4 of this sheet, cannot exceed the value you reported for question 2a.

2a3. Number of students in 2a who withdrew from your institution.

The count of students who, *in what would have been their graduating term* during award year 2009-2010, *did have their loans prorated* and withdrew. The value you report here, in sum with the values you report for questions 2a1, 2a2 and 2a4 of this sheet, cannot exceed the value you reported for question 2a.

2a3i. Total Title IV funds returned for students in 2a3.

The total dollar value of Title IV funds returned for students who, *in what would have been their graduating term* during award year 2009-2010, *did have their loans prorated* and withdrew.

2a4. Number of students in 2a who completed term, but did not graduate or withdraw.

The count of students who, *in what would have been their graduating term* during award year 2009-2010, *did have their loans prorated*, but did *not* graduate or withdraw. The value you report here, in sum with the values you report for questions 2a1, 2a2 and 2a3 of this sheet, cannot exceed the value you reported for question 2a.

2b. Number of students in 2) whose loans were not prorated.

The count of students who, in their graduating term during award year 2009-2010, *did not have their loans prorated*. The value you report here, in sum with the value you report for question 2a of this sheet, cannot exceed the value you reported for question 2.

2b1. Number of students in 2b receiving four-year degrees.

The count of students who, in their graduating term during award year 2009-2010, *did not have their loans prorated* and received a traditional four-year degree (B.S, B.A., etc.). The value you report here, in sum with the values you report for questions 2b2, 2b3 and 2b4 of this sheet, cannot exceed the value you reported for question 2b.

2b2. Number of students in 2b receiving other degrees (A.A, technical, etc.).

The count of students who, in their graduating term during award year 2009-2010, *did not have their loans prorated* and received a non-traditional degree (A.A, technical, etc.). The value you report here, in sum with the values you report for questions 2b1, 2b3 and 2b4 of this sheet, cannot exceed the value you reported for question 2b.

2b3. Number of students in 2b who withdrew from your institution.

The count of students who, *in what would have been their graduating term* during award year 2009-2010, *did not have their loans prorated* and withdrew. The value you report here, in sum with the values you report for questions 2b1, 2b2 and 2b4 of this sheet, cannot exceed the value you reported for question 2b.

2b3i. Total Title IV funds returned for students in 2b3.

The total dollar value of Title IV funds returned for students who, *in what would have been their graduating term* during award year 2009-2010, *did not have their loans prorated* and withdrew.

2b4. Number of students in 2b who completed term, but did not graduate or withdraw.

The count of students who, *in what would have been their graduating term* during award year 2009-2010, *did not have their loans prorated*, but did *not* graduate or withdraw. The value you report here, in sum with the values you report for questions 2b1, 2b2 and 2b3 of this sheet, cannot exceed the value you reported for question 2b.

## **Overaward Tolerance**

1. In order for your experiment to be deemed successful you must provide evidence in the text box below that addresses how the experiment at your school satisfied the 3 criteria for success specified in the recent technical amendments to the HEOA:

- How did the experiment reduce administrative burden?
- How did the experiment avoid creating additional costs to the taxpayers?
- How did the experiment improve delivery services or otherwise benefit students?

Please provide as much detail as possible and if possible quantitative (numeric) evidence in responding to each of the three questions. According to the technical amendments the Secretary

will need this information in order to determine if the experiment has been a success at your institution.

2. Total number of students receiving overawards of \$300 or less in award year 2009-2010. Total number of subsidized Stafford loan borrowers who received overawards of \$300 or less in award year 2009-2010. This is an unduplicated count. If a student received an overaward in more than one period during the award year (semester, trimester, etc.), count them only once. Do not include PLUS only borrowers. The count you report in response to this question cannot exceed the value you reported for question 3 of the Demographic worksheet.

3. Total Stafford loan volume for students in 2), excluding PLUS loans. The total dollar volume of FFEL/Direct Stafford loans benefiting students at your institution in the 2009-2010 award year who received an overaward. *Do not* include the dollar volume of PLUS loans.

4. Total volume of overawards for students in 2). The summed, total dollar value of overawards received by students in question 2. The value you report for this question cannot exceed the value you reported for question 3 of this worksheet.

### **Loan Fees in Cost of Attendance**

1. In order for your experiment to be deemed successful you must provide evidence in the text box below that addresses how the experiment at your school satisfied the 3 criteria for success specified in the recent technical amendments to the HEOA:

- How did the experiment reduce administrative burden?
- How did the experiment avoid creating additional costs to the taxpayers?
- How did the experiment improve delivery services or otherwise benefit students?

Please provide as much detail as possible and if possible quantitative (numeric) evidence in responding to each of the three questions. According to the technical amendments the Secretary will need this information in order to determine if the experiment has been a success at your institution.

2. Total number of students for whom loan fees are included as part of the COA, **excluding** PLUS loans. Total number of FFEL/Direct Stafford loan borrowers for whom loan fees were included as part of the cost of attendance calculation. This is an unduplicated count. Do not include any student more than once in this count. Do not include PLUS only borrowers. The count you report in response to this question cannot exceed the value you reported for question 3 of the Demographic worksheet.

3. Total loan volume for students in 2). The total dollar volume of FFEL/Direct Stafford loan students at your institution *who had*

*loan fees included as part of their cost of attendance in the 2009-2010 award year. Do not include the dollar volume of PLUS loans. The value you report here cannot exceed the value you reported for question 6 of the Demographic worksheet.*

4. Total dollar amount of loan fees included in cost of attendance for students in 2).

*The total dollar amount of loan fees included in the cost of attendance calculation for students at your institution who had loan fees included as part of their cost of attendance in the 2009-2010 award year.*

5. Total number of students for whom loan fees were NOT included in cost of attendance.

*Total number of FFEL/Direct Stafford loan borrowers for whom loan fees were NOT included as part of the cost of attendance calculation. This is an unduplicated count. Do not include any student more than once in this count. Do not include PLUS only borrowers. The count you report in response to this question cannot exceed the value you reported for question 5 of the Demographic worksheet.*

6. Total # of students that did NOT have loan fees included in their COA, who received the maximum annual loan limit for the award year.

*Total number of FFEL/Direct Stafford loan borrowers for whom loan fees were NOT included as part of the cost of attendance calculation, but did receive their annual loan limit for this award year. This is an unduplicated count. Do not include any student more than once in this count. Do not include PLUS only borrowers. The count you report in response to this question cannot exceed the value you reported for question 5 of the Demographic worksheet. It also cannot exceed the number you reported for question 5 of this Loan Fees in COA worksheet.*

7. Total # of students who *could have* had loan fees included in their cost of attendance.

*Total number of FFEL/Direct Stafford loan borrowers for whom loan fees could have been included as part of the cost of attendance calculation in award year 2009-2010. This is an unduplicated count that should approximately equal the sum of students who did, and did not, have loan fees included in their COA calculation. Do not include any student more than once in this count. Do not include PLUS only borrowers. The count you report in response to this question cannot exceed the value you reported for question 5 of the Demographic worksheet. It also cannot be less than the number you reported for question 2 of this Loan Fees in COA worksheet.*

8. Methods of informing students, when requested, that loan fees may be included in cost of attendance. Please specify:

*Describe the method of informing students that loan fees may be included in cost of attendance in the text box provided.*

### **Credit of Title IV Aid to Institutional Charges**

1. In order for your experiment to be deemed successful you must provide evidence in the text box below that addresses how the experiment at your school satisfied the 3 criteria for success specified in the recent technical amendments to the HEOA:

- How did the experiment reduce administrative burden?
- How did the experiment avoid creating additional costs to the taxpayers?
- How did the experiment improve delivery services or otherwise benefit students?

Please provide as much detail as possible and if possible quantitative (numeric) evidence in responding to each of the three questions. According to the technical amendments the Secretary will need this information in order to determine if the experiment has been a success at your institution.

2. Predominant method of informing students of the Crediting of Title IV aid to institutional charges.

Please select the one method that your institution *most frequently* uses to inform students of the application of their Title IV aid to non allowable institutional charges.

3. Total number of students for whom Title IV aid was used to pay otherwise non allowable institutional charges in award year 2009-2010.

The total, unduplicated count of students who took advantage of the option to use Title IV aid funds to pay otherwise non allowable institutional charges (e.g., library fines, parking fines, etc.) in award year 2009-2010. The number you report here cannot exceed the value you reported for question 3 on the Demographic worksheet.

3a. Total volume of Title IV aid for students in 3).

The sum of Title IV aid, excluding PLUS loans, awarded to students taking advantage of the option to use Title IV aid to pay otherwise non allowable institutional charges in award year 2009-2010. The sum of aid you report here cannot exceed the value you reported for question 4 on the Demographic worksheet.

3b. Total dollar amount of otherwise non allowable institutional charges (only) for students in 3).

For students who took advantage of the option to apply Title IV aid to otherwise non allowable institutional charges, what was the sum of these charges?

3c. Total number of students in 3) who either graduated in award year 2009-2010, or are continuing their studies in award year 2009-2010.

For students who took advantage of the option to apply Title IV aid to otherwise non allowable institutional charges, how many graduated or persist in their academic pursuits? The unduplicated count you report here must not exceed the value you reported in question 3 of this Institutional Charges worksheet.

4. Total number of students *declining* the application of Title IV aid to non allowable institutional charges in award year 2009-2010. (Note that **3**) plus **4**) should equal a number very close to the total number of aid recipients)

The total, unduplicated count of students who *declined* the option to use Title IV aid funds to pay otherwise non allowable institutional charges (e.g., library fines, parking fines, etc.) in award year 2009-2010. The number you report here cannot exceed the value you reported for question 3 on the Demographic worksheet.

4a. The total volume of Title IV aid for students in 4).

The sum of Title IV aid, excluding PLUS loans, awarded to students *who declined* the option to use Title IV aid to pay otherwise non allowable institutional charges in award year 2009-2010. The sum of aid you report here cannot exceed the value you reported for question 4 on the Demographic worksheet.

4b. Total dollar amount of otherwise non allowable institutional charges (only) for students in 4). For students who *declined* the option to apply Title IV aid to otherwise non allowable institutional charges, what was the sum of the institutional charges that *could have been* covered by Title IV aid under the conditions of this experiment?

4c. Total number of students in 4) who either graduated in award year 2009-2010, or are continuing their studies in award year 2009-2010.

For students who *declined* the option to apply Title IV aid to otherwise non allowable institutional charges, how many graduated or persist in their academic pursuits? The unduplicated count you report here must not exceed the value you reported in question 4 of this Institutional Charges worksheet.

5. The total number of students who took advantage of the crediting of Title IV aid to otherwise non allowable institutional charges for multiple terms in award year 2009-2010.

For students who took advantage of the option to apply Title IV aid to otherwise non allowable institutional charges, how many did so *more than once* during the 2009-2010 award year?

### **Credit Title IV Aid to Prior Award Year Charges**

1. In order for your experiment to be deemed successful you must provide evidence in the text box below that addresses how the experiment at your school satisfied the 3 criteria for success specified in the recent technical amendments to the HEOA:

- How did the experiment reduce administrative burden?
- How did the experiment avoid creating additional costs to the taxpayers?
- How did the experiment improve delivery services or otherwise benefit students?

Please provide as much detail as possible and if possible quantitative (numeric) evidence in responding to each of the three questions. According to the technical amendments the Secretary will need this information in order to determine if the experiment has been a success at your institution.

2. Predominant method of informing students of the Crediting of Title IV aid to Prior Award Year charges.

Please select the one method that your institution *most frequently* uses to inform students of the application of their Title IV aid to Prior Award Year charges.

3. Total number of students for whom Title IV aid received in award year 2009-2010 was used to pay charges incurred in the previous award year.

The total, unduplicated count of students who took advantage of the option to use Title IV aid funds to pay charges incurred in the previous award year. The number you report here cannot exceed the value you reported for question 3 on the Demographic worksheet.

3a. Total volume of Title IV aid for students in 3).

The sum of Title IV aid, excluding PLUS loans, awarded to students taking advantage of the option to use Title IV aid to pay charges incurred in the previous award year. The sum of aid you report here cannot exceed the value you reported for question 4 on the Demographic worksheet.

3b. Total dollar amount of Title IV aid for students in 3) used to pay charges incurred in the previous award year.

For students who took advantage of the option to apply Title IV aid to charges incurred in the previous award year, what was the sum of these charges?

3c. Total number of students in 3) who either graduated in award year 2009-2010, or are continuing their studies in award year 2009-2010.

For students who took advantage of the option to apply Title IV aid to charges incurred in the previous award year, how many graduated or persist in their academic pursuits? The unduplicated count you report here must not exceed the value you reported in question 3 of this Prior Award Year Charges worksheet.

4. Total number of students *declining* the application of Title IV aid received in award year 2009-2010 to charges incurred in the previous award year.

The total, unduplicated count of students who *declined* the option to use Title IV funds awarded for award year 2009-2010 to pay for charges incurred in the previous award year. The number you report here cannot exceed the value you reported for question 3 on the Demographic worksheet.

4a. Total volume of Title IV aid for students in 4).

The sum of Title IV aid, excluding PLUS loans, awarded to students *declining* the option to use Title IV aid to pay charges incurred in the previous award year. The sum of aid you report here cannot exceed the value you reported for question 4 on the Demographic worksheet.

4b. Total dollar amount of charges incurred in the previous award year by students in 4) that *could have been* covered by Title IV aid if the student had chosen to do so.

For students who *declined* the option to apply Title IV aid to charges incurred in the previous award year, what was the sum of the charges that could have been covered by Title IV aid had these students elected to do so?

4c. Total number of students in 4) who either graduated in award year 2009-2010, or are continuing their studies in award year 2009-2010.

For students who *declined* the option to apply Title IV aid to charges incurred in the previous award year, how many graduated or persist in their academic pursuits? The unduplicated count you report here must not exceed the value you reported in question 4 of this Prior Award Year Charges worksheet.

## Entrance Loan Counseling

1. In order for your experiment to be deemed successful you must provide evidence in the text box below that addresses how the experiment at your school satisfied the 3 criteria for success specified in the recent technical amendments to the HEOA:

- How did the experiment reduce administrative burden?
- How did the experiment avoid creating additional costs to the taxpayers?
- How did the experiment improve delivery services or otherwise benefit students?

Please provide as much detail as possible and if possible quantitative (numeric) evidence in responding to each of the three questions. According to the technical amendments the Secretary will need this information in order to determine if the experiment has been a success at your institution.

2. Do you conduct entrance counseling, or do you provide information in an alternate method? You may choose only one response.

3. Total number of first-time, FFEL/Direct Stafford borrowers (exclude PLUS only borrowers) in the Fall of 2009.

Total number of first-time, FFEL/Direct Stafford borrowers (exclude students who benefited from PLUS only) in the Fall of 2009. Your response may not exceed the count you provided for question 5 of the Demographic worksheet.

4. Total FFEL/Direct Stafford loan volume for students in 3).

Excluding PLUS loans, the total loan volume for first-time, FFEL/Direct Stafford loan borrowers at your institution in the Fall of 2009. Your response may not exceed the value you provided in response to question 6 of the Demographic worksheet.

5. Are only certain groups of students in 3) required to undergo entrance counseling?

You will be required to answer “Yes” or “No”. If you answer “Yes”, then you should identify these groups of students in the text box provided for this purpose on the right of the Entrance Loan Counseling worksheet.

6. When entrance loan counseling is conducted the predominant medium is ...

You will be provided with a list of popular mediums. Please choose the one that is most frequently used at your institution. “Other” is a valid response, however, if you do answer “Other”, then you should elaborate in the text box provided for this purpose.

## Exit Loan Counseling

1. In order for your experiment to be deemed successful you must provide evidence in the text box below that addresses how the experiment at your school satisfied the 3 criteria for success specified in the recent technical amendments to the HEOA:

- How did the experiment reduce administrative burden?

- How did the experiment avoid creating additional costs to the taxpayers?
- How did the experiment improve delivery services or otherwise benefit students?

Please provide as much detail as possible and if possible quantitative (numeric) evidence in responding to each of the three questions. According to the technical amendments the Secretary will need this information in order to determine if the experiment has been a success at your institution.

2. Does your institution conduct exit counseling?

You will be provided with the option of responding “Yes” or “No”.

3. Total number of final-term borrowers in award year 2009-2010.

Please provide the total count of borrowers at your institution in award year 2009-2010 who were in their final-term. By final-term, it is meant the term immediately preceding graduation, or the term of withdrawal (official or unofficial). Your response to this question may not exceed the count you provided for question 5) on the Demographic worksheet.

4. Total number of borrowers in 3) who graduated.

Of the total count of borrowers at your institution in award year 2009-2010 who were in their final-term, how many graduated? Note that your response to this question should not exceed your response to question 3 on this Exit Loan Counseling worksheet. The sum of your responses to this question and question 5 cannot exceed your response to question 3.

5. Total number of borrowers in 3) who withdrew (officially or unofficially).

Of the total count of borrowers at your institution in award year 2009-2010 who were in their final-term, how many withdrew? Note that your response to this question should not exceed your response to question 3 on this Exit Loan Counseling worksheet. The sum of your responses to this question and question 4 cannot exceed your response to question 3.

6. Total cumulative debt for borrowers in 3).

For the total count of borrowers at your institution in award year 2009-2010 who were in their final-term, please provide their total loan volume/debt (exclude PLUS) incurred over the duration of their academic careers.

7. When exit counseling is conducted, is it predominantly ...

You will be provided with a number of choices. Please choose the one medium that is most frequently employed at your institution. A valid response is “Other”. If you choose to respond in this manner, please describe the medium/procedure in the text box provided for this purpose.

8. Are students in 3) surveyed on their knowledge of repayment obligations?

You may respond “Yes” or “No”.