

# Experimental Sites Reporting Tool in COD

*2020-21 Upload Workbook*

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## Introduction

This workbook was developed to assist institutions with the process for reporting student-level, experiment-specific information to FSA using the ESI Reporting Tool in COD.

The Experimental Sites Team updates this workbook annually to provide information and dates specific to each award year.

Note: The CBE, LDA, PLA, and EQUIP experiments ended on June 30, 2020. Although the templates for those experiments are still available in COD, no reporting is required for 2020-2021 and those experiments are not part of the 2020-2021 workbook.

## Background

Experimental Sites Initiative (ESI) participants must report experiment-specific information to Federal Student Aid (FSA). This information will be collected through a web-based reporting tool within COD and from school responses to surveys. This workbook specifically addresses how to use the ESI Reporting Tool in COD.

Participating schools are required to complete and upload the Excel template specific to the experiment in which the school is participating. Doing so will identify all the aid applicants affected by your school's participation in the applicable experiment and provide information needed for the evaluation of the experiment.

## Instructions

Users will upload experiment specific Excel templates within the ESI Reporting Tool in COD to satisfy the student-level data reporting requirement. Excel templates for all experiments identifying the required data elements are available within the ESI Reporting Tool in COD.

Depending on the number of participants in an experiment, schools may choose to enter the required information manually for each participant in the experiment, or work with IT resources to import the required information into COD via the ESI upload template(s). Schools must not make any changes to the formatting of the templates. This specific format of the templates must be used in order for data to be processed correctly.

**There are separate templates for each experiment. You must download the template for the experiment in which you participate and then upload the individual template into COD using the instructions provided in this workbook. If your institution participates in more than one experiment, you must upload the correct template for each experiment. The templates are experiment specific. If a student's aid award is affected by multiple experiments, he or she would be included in multiple reporting templates.**

## Deadlines

Annual reporting via the ESI Reporting Tool in COD for 2020-21 must be completed and uploaded by **December 10, 2021**.

Timely reporting is a requirement outlined in your institution's amendment to its Program Participation Agreement.

## Monthly Reporting for the Second Chance Pell and Dual Enrollment Experiments

Institutions participating in the Dual Enrollment and Second Chance Pell experiments are required to submit **monthly** reports to FSA that provide year to date accounting of Pell Grant funds disbursed. The monthly reporting is necessary to ensure that each institution adheres to the spending cap established based upon the anticipated number of students enrolled, cost of attendance and enrollment status.

For this monthly reporting, schools are only required to complete the first five columns (columns A through E) of the Excel template specific to the experiment in which your school participates. Monthly reporting must include **all** applicants who completed a FAFSA.

Once your school begins disbursing Pell you will begin your monthly reporting.

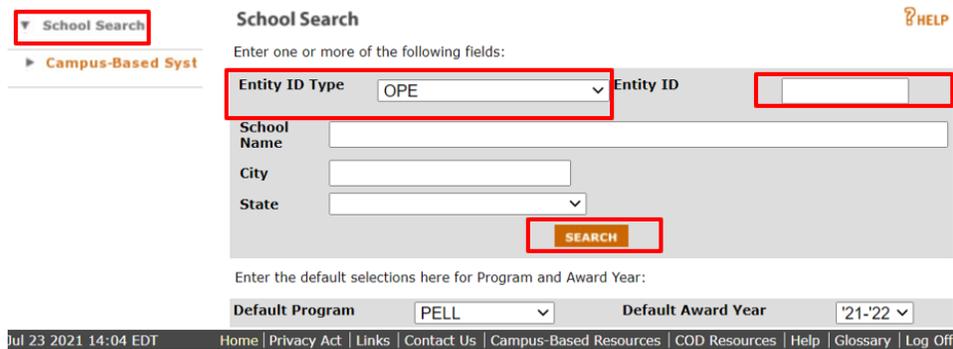
**Reminder: Annual reporting for all applicants in 2020-2021, with ALL applicable columns completed, is due December 10, 2021.**

# Experimental Sites Initiative Template Download: All Experiments

- 1 Access the COD website using your FSA ID, password and token: [cod.ed.gov](https://cod.ed.gov)



- 2 Once logged into COD, select "School" from the menu bar at the top of the COD Homepage. Then select "School Search" from the left-hand menu. Use the drop down arrow and select OPE as the Entity ID Type. Enter your eight digit OPE ID as the Entity ID and click "search."



- The School Summary Information screen will display. Scroll down to the bottom and click on “Experimental Sites Initiative” to access the ESI Upload Templates.

**School Summary Information** ? HELP

**OHIO EYE ALLIANCE RESIDENCY IN OCULAR DISEASE** !

Enter the default selections here for Program and Award Year:

Default Program:  Default Award Year:

Contacts			Summary	
Type	Name	Phone	Award Year	Program
FINANCIAL AID ADMINISTRATOR	DIANE GREENLEE	(248) 233-3798 x 7406	'20-'21	PELL
			Cash > Net Accepted & Posted Disbursements & older than 30 days	\$0.00
			% of Cash > Net Accepted & Posted Disbursements	0.0%
			Cash > Net Accepted & Posted Disbursements	\$0.00
			Current CFL	\$0.00

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- There are two options at the top: Template and Upload. Click Template (it is the default selection and should already be highlighted). You must download a separate template specific to each experiment in which your institution participates. Locate the experiment in which you participate in the Experiment Type column. Click the “Download Template” link on the right-hand side.

**Experimental Sites Initiative** ? HELP

Template Upload

**OHIO EYE ALLIANCE RESIDENCY IN OCULAR DISEASE** !

To submit information for Experimental Site Initiatives, download the Experimental Site Initiative Template below. Please populate all required fields and enter all information in the prescribed format. Once you have completed populating the template, save and upload using the tab above.

Experiment Number	Experiment Type	Download Template
20	Limiting Unsubsidized Loans (Limited Unsub)	<a href="#">Download Template</a>
23	Prior Learning Assessment (PLA)	<a href="#">Download Template</a>
24	Competency Based Education (CBE) - Split Disbursement	<a href="#">Download Template</a>
25	Limited Direct Assessment (LDA)	<a href="#">Download Template</a>
27	Second Chance Pell (SCP)	<a href="#">Download Template</a>
28	EQUIP	<a href="#">Download Template</a>
29	Dual Enrollment	<a href="#">Download Template</a>
30	Competency Based Education (CBE) - Satisfactory Academic Progress	<a href="#">Download Template</a>
31	Competency Based Education (CBE) - Subscription Period Disbursement	<a href="#">Download Template</a>
32	Loan Counseling	<a href="#">Download Template</a>
33	Federal Work-Study	<a href="#">Download Template</a>

## Template Download

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- 5 After the download is complete, the downloaded Excel file will be available on the bottom left of the screen. Click on the downloaded file to open the Excel template. In the example for this workbook, we downloaded the Federal Work-Study template. After opening the file, save the file to your computer or network. If you are participating in more than one experiment, you must download the specific template for each experiment.

The screenshot shows a reporting tool interface. On the left is a navigation menu with items like 'Yearly Totals', 'Relationships', 'Balance Confirmation', etc., and a section for 'Campus-Based Syst'. The main area is a table with three columns: 'Experiment Number', 'Experiment Type', and 'Download Template'. The table lists 14 experiments, with the last one being 'Federal Work-Study'. A blue arrow points from the 'Federal Work-Study' row to a file icon labeled 'federal-work-stud....xlsx' in the bottom left corner.

Experiment Number	Experiment Type	Download Template
20	Limiting Unsubsidized Loans (Limited Unsub)	Download Template
23	Prior Learning Assessment (PLA)	Download Template
24	Competency Based Education (CBE) - Split Disbursement	Download Template
25	Limited Direct Assessment (LDA)	Download Template
27	Second Chance Pell (SCP)	Download Template
28	EQUIP	Download Template
29	Dual Enrollment	Download Template
30	Competency Based Education (CBE) - Satisfactory Academic Progress	Download Template
31	Competency Based Education (CBE) - Subscription Period Disbursement	Download Template
32	Loan Counseling	Download Template
33	Federal Work-Study	Download Template

federal-work-stud....xlsx

- 6 Once you have downloaded and saved the template(s), you can exit the Reporting Tool within COD. Refer to the instructions for the appropriate experiment(s) in the [Experiment Template Instructions](#) section of this guide.
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## Experimental Sites Initiative Template Upload: All Experiments

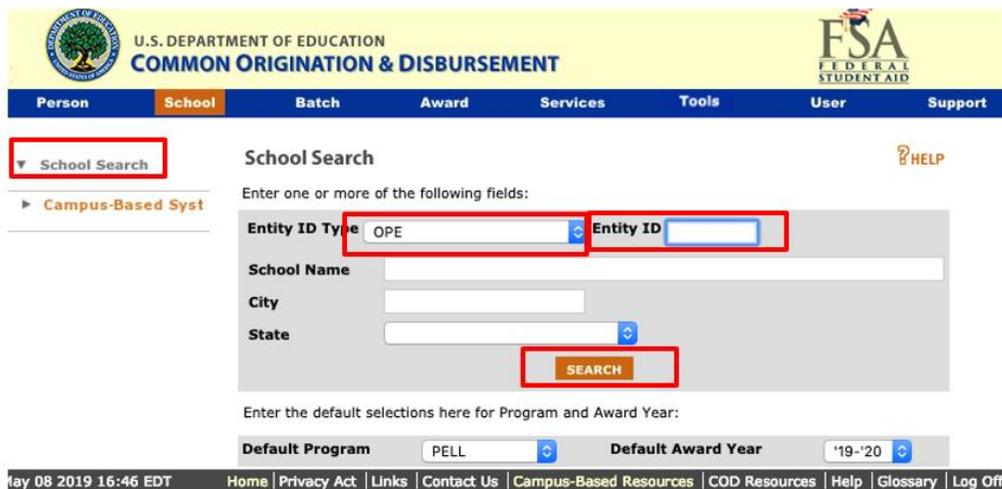
Once you have completed your template, follow the instructions to upload it into COD. Below are step-by-step instructions for participating schools to upload the completed templates into the ESI Reporting Tool within COD.

- 1 Access the COD website using your FSA ID, password and token: [cod.ed.gov](https://cod.ed.gov)



- 2 Once logged into COD, select "School" from the menu bar at the top of the COD Homepage. Then select "School Search" from the left-hand menu. Use the drop down arrow and select OPE as the Entity ID Type. Enter your eight digit OPE ID as the Entity ID and click "search."

Remember, only the main campus (the school with the OPE ID that is approved for the experiment) can submit the template in COD.



- The School Summary Information screen will display. Scroll down to the bottom and click on “Experimental Sites Initiative” to access the ESI Upload screen.

**School Summary Information** ? HELP

**OHIO EYE ALLIANCE RESIDENCY IN OCULAR DISEASE**

Enter the default selections here for Program and Award Year:

Default Program: PELL      Default Award Year: '20-'21

Contacts			Summary	
Type	Name	Phone	Award Year	
FINANCIAL AID ADMINISTRATOR	DIANE GREENLEE	(248) 233-3798 x 7406	'20-'21	PELL
			Cash > Net Accepted & Posted Disbursements & older than 30 days	\$0.00
			% of Cash > Net Accepted & Posted Disbursements	0.0%
			Cash > Net Accepted & Posted Disbursements	\$0.00
			Current CFL	\$0.00

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- On this screen, there are two options at the top: Template and Upload. Click Upload. Using the drop down arrow to select the experiment type, click on the name of the experiment in which you are participating. Click Choose File. A popup box will appear. Locate the file you would like to upload. Double click on the file or click Open. Then, click “Upload.”

Your file must be named something different than the name of the file you downloaded.

**Experimental Sites Initiative** ? HELP

Template    **Upload**

**OHIO EYE ALLIANCE RESIDENCY IN OCULAR DISEASE**

To submit information for Experimental Site Initiatives, download the Experimental Site Initiative Template below. Please populate all required fields and enter all information in the prescribed format. Once you have completed populating the template, save and upload using the field below.

27 - Second Chance Pell (SCP)    Choose File    Second Chance Pell test.xls    **Upload**

Select Experiment Type

- 20 - Limiting Unsubsidized Loans (Limited Unsub)
- 23 - Prior Learning Assessment (PLA)
- 24 - CBE - Split Disbursement
- 25 - Limited Direct Assessment (LDA)
- 27 - Second Chance Pell (SCP)**
- 28 - EQUIP
- 29 - Dual Enrollment
- 30 - CBE - Satisfactory Academic Progress
- 31 - CBE - Subscription Period Disbursement
- 32 - Loan Counseling

- 5 If the upload is successful, the file will have an ID number associated with it indicating the file has passed the virus scan and the file will be marked as “Pending.” **You must check back again (usually within a few minutes) to ensure the file is marked as “Processed”** after the uploaded template is validated with no errors.

To submit information for Experimental Site Initiatives, download the Experimental Site Initiative Template below. Please populate all required fields and enter all information in the prescribed format. Once you have completed populating the template, save and upload using the field below.

✔ Upload Successful. See ID #18015

Select Experiment Type ▼

 No file chosen

ID#	Experiment Number	Experiment Type	Date Submitted	Status
18015	27	Second Chance Pell (SCP)	06/04/2021 02:30:30 PM	Pending

- 6 Successful validation occurs when the template data is in the correct format for each required field with valid entries. Once the file is marked “Processed” you have successfully uploaded your file using the Reporting Tool.

ID#	Experiment Number	Experiment Type	Date Submitted	Status
18015	27	Second Chance Pell (SCP)	06/04/2021 02:30:30 PM	Processed

- 7 **Files uploaded with an Error status.** When the user uploads a file and it contains ‘bad data’ an “Error” hyperlink message will display. Click on the Error hyperlink, and you will be redirected to a page which will display the errors that must be fixed.

ID#	Experiment Number	Experiment Type	Date Submitted	Status
18016	27	Second Chance Pell (SCP)	06/04/2021 02:35:35 PM	Error

- 8 The Experimental Sites Initiative Error Detail page will display each error found for a specific row of the excel template that was uploaded. Fix any errors identified and upload the file again. See the [Error Troubleshooting](#) table of this workbook for instructions on fixing common errors.

Return to: [Experimental Sites Initiative Page](#)

Experimental Sites Initiative Error Detail Page [?HELP](#)

OHIO EYE ALLIANCE RESIDENCY IN OCULAR DISEASE !

ID #: 18016

Row #	Error Type
2	Invalid Student SSN - SSN is non numerical

« < 1 > »

- 8 After successfully uploading the data, the file will be marked “Processed.” **Schools must check that the file uploaded is marked “Processed” to ensure that the file has been successfully uploaded.**

## Experiment Template Instructions

Each experiment has one set of instructions for completing the template. Find the instructions for the appropriate experiment in the pages that follow:

[Second Chance Pell](#) pages 12-19

[Dual Enrollment](#) pages 20-26

[Loan Counseling](#) pages 27-31

[Limiting Unsubsidized Loans](#) pages 32-36

[Federal Work-Study](#) pages 37-49

## Second Chance Pell

Below you will find a data dictionary that defines each column. Please send a message to the Experimental Sites mailbox at [ExperimentalSites@ed.gov](mailto:ExperimentalSites@ed.gov) if you have any questions.

For annual reporting all columns must be completed. For monthly reporting you are only required to complete the first five columns.

*\*Required columns for monthly reporting*

Column	Field	Instructions	Max Length	Example
A*	Award Year	Enter the four digits of the <i>last year of the current award year</i> (for 2019-2020 award year <i>enter 2020</i> ; for 2020-2021 enter 2021, etc.) (EXAMPLE: Use 2020 for 2019-2020)	4	2020
B*	Experiment Number	Enter the experiment number of the experiment in which the student participates. <i>Each template is pre-populated <b>on line 2</b> with the correct experiment number (see Appendix A for a listing of all experiment numbers)</i>	2	12
C*	OPEID	OPE ID – enter the eight digit OPE ID of the participating institution that signed the PPA Amendment	8	12345678
D*	Student SSN	Enter the Social Security Number (9 digits, no dashes) for each student.  This field has been formatted as a “Text” field in Excel to accommodate students who have social security number with leading zeros. This column must remain a text field to upload properly.	9	123456789
E*	Student Last Name	Enter the last name of the student.	35	Abraham
F	Student First Name	Enter the first name of the student.	30	John
G	Direct Costs	Enter the amount of Direct Costs for the student (Direct Costs are Institutional Costs). Examples of Direct Costs include tuition, fees, and room and board (if contracted with the school). Direct costs can also include expenses for required course materials (books, kits, tools, supplies, etc.) <i>if the student does not have a real and reasonable opportunity to purchase the required course materials from any place but the school.</i>	13	100235000000.00

Second Chance Pell

Column	Field	Instructions	Max Length	Example
H	Indirect Costs	Enter the amount of Indirect Costs for the student (Indirect Costs are Non-institutional Costs). Examples of Indirect Costs include charges for any required course materials that a school can document a student had a real and reasonable opportunity to purchase elsewhere, charges to a student's account for group health insurance fees if the insurance is required for all students and the coverage remains in effect for the entire period for which the student was charged, despite the student's withdrawal, and charges to a student's account for discretionary, educationally related expenses (e.g., parking or library fines).	13	100235000000.00
I	Total Amount PLUS Loans Initially Awarded	Enter the amount of PLUS Loans <i>awarded</i> to the student.  If none, enter 0.	13	100235000000.00
J	Total Amount PLUS Loans Disbursed	Enter the amount of PLUS Loans <i>disbursed</i> on behalf of the student.  If none, enter 0.	13	100235000000.00
K	Total Amount FSEOG Initially Awarded	Enter the amount of FSEOG funds <i>awarded</i> to the student.  If none, enter 0.	13	100235000000.00
L	Total Amount FSEOG Disbursed	Enter the amount of FSEOG funds <i>disbursed</i> to the student.  If none, enter 0.	13	100235000000.00
M	Total Amount Perkins Initially Awarded	Enter the amount of Perkins funds <i>awarded</i> to the student.  If none, enter 0.	13	100235000000.00
N	Total Amount Perkins Disbursed	Enter the amount of Perkins funds <i>disbursed</i> to the student.  If none, enter 0.	13	100235000000.00
O	FWS Awarded	Enter the amount of FWS funds <i>awarded</i> to the student.  If none, enter 0.	13	100235000000.00

Second Chance Pell

Column	Field	Instructions	Max Length	Example
P	FWS Disbursed	Enter the amount of FWS funds <i>disbursed</i> to the student  If none, enter 0.	13	100235000000.00
Q	Other Federal Aid Awarded	Enter the amount of other Federal Aid <i>awarded</i> to the student (besides FWS). Examples of other Federal aid include Pell Grant, FSEOG, Perkins, TEACH, Subsidized Direct Loan, Unsubsidized Direct Loan, Direct PLUS – Graduate Student and Direct PLUS - Parent). Be sure to only include awarded amounts. You will report amounts disbursed in a later column.  If none, enter 0.	13	100235000000.00
R	Other Federal Aid Disbursed	Enter the amount of other Federal Aid <i>disbursed</i> to the student (besides FWS). Examples of other Federal aid include Pell Grant, FSEOG, Perkins, TEACH, Subsidized Direct Loan, Unsubsidized Direct Loan, Direct PLUS – Graduate Student and Direct PLUS - Parent).  If none, enter 0.	13	100235000000.00
S	Non-Federal Aid Awarded	Enter the amount of other Non-Federal Aid <i>awarded</i> to the student. Examples of Non-Federal aid include institutional aid and outside scholarships). Be sure to only include awarded amounts. You will report amounts disbursed in a later column.  If none, enter 0.	13	100235000000.00
T	Non-Federal Aid Disbursed	Enter the amount of other Non-Federal Aid <i>disbursed</i> to the student. Examples of Non-Federal aid include institutional aid and outside scholarships).  If none, enter 0.	13	100235000000.00
U	Credits attempted (current award year)	Enter the credits <i>attempted</i> by the student during the current award year (the current award year is the award year for which the school is currently reporting).	4	134
V	Credits earned (current award year)	Enter the credits <i>earned</i> by the student during the current award year (the current award year is the award year for which the school is currently reporting).	4	134

Second Chance Pell

Column	Field	Instructions	Max Length	Example
W	Cumulative Credits earned (prior to award year)	Enter the cumulative credits <i>earned</i> by the student prior to the current award year (this amount would be the total number of credits earned prior to the student enrolling in this current award year).	4	134
X	Cumulative Credits earned (at end of award year)	Enter the cumulative credits <i>earned</i> by the student at the end of the current award year (this amount would be the total number of credits earned to date including this current award year).	4	134
Y	Student's Cum. GPA for last completed AY	Enter the student's cumulative grade point average (GPA) at the end of the award year for which the school is currently reporting). If you enter 4.0 then the cell might round to 4, that is fine.	1 value to the left of the decimal and 4 values to the right of decimal	3.4257
Z	Beginning of Award Year Enrollment status	Enter the enrollment status of the student at the beginning of the award year for which the school is currently reporting.  N = not enrolled F = full time T = ¾ time H = half time L = less than half time	1	F
AA	End of Award Year Enrollment Status	Enter the enrollment status of the student at the end of the award year for which the school is currently reporting.  N = not enrolled F = full time T = ¾ time H = half time L = less than half time	1	F
AB	Is this student participating in multiple experiments?	Enter "Y" for Yes or "N" for No.	1	Y

Second Chance Pell

Column	Field	Instructions	Max Length	Example
AC	List other experiments student is participating in (Experiment Numbers only)	List the experiment number(s) of the other experiments in which the student participates (See <a href="#">Appendix A</a> for the experiment numbers). Leave blank if you answered "N" in Column AB.	10	08 09 13
AD	Did the student complete the academic program associated with the student's participation in the experiment during this award year?	Enter "Y" if the applicant completed the academic program associated with the experiment during this award year (the award year in which the school is reporting).  Otherwise, enter "N"	1	Y
AE	Not eligible for Pell - Default	Enter "Y" if the applicant was not eligible for Pell due to Default status.  Otherwise, enter "N"	1	Y
AF	Not eligible for Pell - Selective Service	Enter "Y" if the applicant was not eligible for Pell due to Selective Service status.  Otherwise, enter "N"	1	Y
AG	Not eligible for Pell - Citizenship	Enter "Y" if the applicant was not eligible for Pell due to Citizenship status.  Otherwise, enter "N"	1	Y
AH	Not eligible for Pell - High school completion	Enter "Y" if the applicant was not eligible for Pell due to High School Completion status.  Otherwise, enter "N"	1	Y
AI	Not eligible for Pell - Drug conviction	Enter "Y" if the student was not eligible for Pell due to Drug Conviction status.  Otherwise, enter "N"	1	Y

Second Chance Pell

Column	Field	Instructions	Max Length	Example
AJ	Not eligible for Pell - EFC	Enter "Y" if the applicant was not eligible for Pell due to ineligible EFC.  Otherwise, enter "N"	1	Y
AK	Not eligible for Pell - Did not complete FAFSA	Enter "Y" if the applicant did not successfully file a FAFSA to be considered for Pell. For example, the student was selected for but failed to complete verification.  Otherwise, enter "N"  Given the fact that students must complete a FAFSA to be considered for an experimental Pell Grant and completing a FAFSA is generally the first step ALL potential student participants take, a "Y" should only be entered in column AK if an applicant was selected for and failed to complete verification.	1	Y
AL	Not eligible for Pell - Did not enroll in an eligible program	Enter "Y" if the student was not eligible for Pell due to NOT enrolling in an eligible program.  Otherwise, enter "N."	1	Y
AM	Not eligible for Pell - Enrollment Status	Enter "Y" if the student was not eligible for Pell due to Enrollment status.  Otherwise, enter "N"	1	Y
AN	Prior to experiment, was student enrolled in a postsecondary program while incarcerated?	Enter "Y" if the student was enrolled in a postsecondary program prior to the experiment while the student was incarcerated.  Otherwise, enter "N"	1	Y
AO	Student enrolled in ineligible program at current institution? (Y = Yes \ N = No \ U = Unknown)	Enter "Y" if the student was enrolled in a postsecondary program offered by your institution that is not participating in the experiment.  Enter "N" if the student was not enrolled in an ineligible program at the institution.  Otherwise, enter "U"	1	U

Second Chance Pell

Column	Field	Instructions	Max Length	Example
AP	Student enrolled in ineligible program at another institution? (Y = Yes \ N = No \ U = Unknown)	Enter "Y" if the student was enrolled in a postsecondary program at another institution that is not participating in the experiment.  Enter "N" if the student was not enrolled in a program ineligible to participate in the experiment at another institution.  Otherwise, enter "U"	1	Y
AQ	What was the student's incarceration status at the end of the most recently completed award year?	Enter either R, SCF, ACF, or U  R= Released SCF=Same Correctional Facility ACF=Another Correctional Facility U= Unknown	3	R
AR	What is the CIP code for the applicant's program of study?	Enter the CIP code(s) of the approved program(s) in which the student was enrolled during the most recently completed award year (the award year in which the school is reporting).	8	12.3456
AS	What was the applicant's highest degree at the time of application? Select one of the following options: A. Associate's degree B. Bachelor's degree C. Master's degree D. Doctorate or professional degree E. None	Enter either A, B, C, D, or E  A. Associate's degree B. Bachelor's degree C. Master's degree D. Doctorate or professional degree E. None	1	A
AT	Was the applicant released from their correctional facility because of COVID-19? (Y/N)	Enter "Y" if the student was released from the correctional facility due to COVID-19.  Otherwise, enter "N"	1	Y
AU	Did the applicant remain incarcerated but stop participating in the experiment because of COVID-19? (Y/N)	Enter "Y" if the applicant remained incarcerated but stopped participating in the experiment for the remainder of the award year due to COVID-19.  Otherwise, enter "N"	1	Y

Second Chance Pell

Column	Field	Instructions	Max Length	Example
AV	If an applicant was released from their correctional facility due to COVID-19, did they continue participating in their educational program? (Y = Yes \ N = No \ N/A = Not Applicable)	<p>If the applicant was released from their correctional facility due to COVID-19:</p> <p>Enter “Y” if they continued participating in their educational program.</p> <p>Enter “N” if they did not continue their education program.</p> <p>If the applicant was not released from their correctional facility due to COVID-19 enter “N/A”</p>	3	Y
AW	Intentionally left blank	Leave this Column blank unless the ESI Team notifies your institution to enter specific information in this column.	50	This field is intentionally left blank.

## Dual Enrollment

Below you will find a data dictionary that defines each column. Please send a message to the Experimental Sites mailbox at [ExperimentalSites@ed.gov](mailto:ExperimentalSites@ed.gov) if you have any questions.

For annual reporting all columns must be completed. For monthly reporting you are only required to complete the first five columns.

*\*Required columns for monthly reporting*

Column	Field	Instructions	Max Length	Example
A*	Award Year (EXAMPLE: Use 2020 for 2019-2020)	Enter the four digits of the <i>last year of the current award year</i> (for 2019-2020 award year <i>enter 2020</i> ; for 2020-2021 enter 2021, etc.)	4	2020
B*	Experiment Number	Enter the experiment number of the experiment in which the student participates. <i>Each template is pre-populated <b>on line 2</b> with the correct experiment number (see <a href="#">Appendix A</a> for a listing of all experiment numbers)</i>	2	12
C*	OPEID	OPE ID – enter the eight digit OPE ID of the participating institution that signed the PPA Amendment	8	12345678
D*	Student SSN	Enter the Social Security Number (9 digits, no dashes) for each student.  This field has been formatted as a “Text” field in Excel to accommodate students who have social security number with leading zeros. This column must remain a text field to upload properly.	9	123456789
E*	Student Last Name	Enter the last name of the student.	35	Abraham
F	Student First Name	Enter the first name of the student.	30	John
G	Direct Costs	Enter the amount of Direct Costs for the student (Direct Costs are Institutional Costs). Examples of Direct Costs include tuition, fees, and room and board (if contracted with the school). Direct costs can also include expenses for required course materials (books, kits, tools, supplies, etc.) <i>if the student does not have a real and reasonable opportunity to purchase the required course materials from any place but the school.</i>	13	100235000000.00

## Dual Enrollment

Column	Field	Instructions	Max Length	Example
H	Indirect Costs	Enter the amount of Indirect Costs for the student (Indirect Costs are Non-institutional Costs). Examples of Indirect Costs include charges for any required course materials that a school can document a student had a real and reasonable opportunity to purchase elsewhere, charges to a student's account for group health insurance fees if the insurance is required for all students and the coverage remains in effect for the entire period for which the student was charged, despite the student's withdrawal, and charges to a student's account for discretionary, educationally related expenses (e.g., parking or library fines).	13	100235000000.00
I	Total Amount PLUS Loans Initially Awarded	Enter the amount of PLUS Loans <i>awarded</i> to the student.  If none, enter 0.	13	100235000000.00
J	Total Amount PLUS Loans Disbursed	Enter the amount of PLUS Loans <i>disbursed</i> on behalf of the student.  If none, enter 0.	13	100235000000.00
K	Total Amount FSEOG Initially Awarded	Enter the amount of FSEOG funds <i>awarded</i> to the student.  If none, enter 0.	13	100235000000.00
L	Total Amount FSEOG Disbursed	Enter the amount of FSEOG funds <i>disbursed</i> to the student.  If none, enter 0.	13	100235000000.00
M	Total Amount Perkins Initially Awarded	Enter the amount of Perkins funds <i>awarded</i> to the student.  If none, enter 0.	13	100235000000.00
N	Total Amount Perkins Disbursed	Enter the amount of Perkins funds <i>disbursed</i> to the student.  If none, enter 0.	13	100235000000.00
O	FWS Awarded	Enter the amount of FWS funds <i>awarded</i> to the student.  If none, enter 0.	13	100235000000.00

## Dual Enrollment

Column	Field	Instructions	Max Length	Example
P	FWS Disbursed	Enter the amount of FWS funds <i>disbursed</i> to the student  If none, enter 0.	13	100235000000.00
Q	Other Federal Aid Awarded	Enter the amount of other Federal Aid <i>awarded</i> to the student (besides FWS). Examples of other Federal aid include Pell Grant, FSEOG, Perkins, TEACH, Subsidized Direct Loan, Unsubsidized Direct Loan, Direct PLUS – Graduate Student and Direct PLUS - Parent). Be sure to only include awarded amounts. You will report amounts disbursed in a later column.  If none, enter 0.	13	100235000000.00
R	Other Federal Aid Disbursed	Enter the amount of other Federal Aid <i>disbursed</i> to the student (besides FWS). Examples of other Federal aid include Pell Grant, FSEOG, Perkins, TEACH, Subsidized Direct Loan, Unsubsidized Direct Loan, Direct PLUS – Graduate Student and Direct PLUS - Parent).  If none, enter 0.	13	100235000000.00
S	Non-Federal Aid Awarded	Enter the amount of other Non-Federal Aid <i>awarded</i> to the student. Examples of Non-Federal aid include institutional aid and outside scholarships). Be sure to only include awarded amounts. You will report amounts disbursed in a later column.  If none, enter 0.	13	100235000000.00
T	Non-Federal Aid Disbursed	Enter the amount of other Non-Federal Aid <i>disbursed</i> to the student. Examples of Non-Federal aid include institutional aid and outside scholarships).  If none, enter 0.	13	100235000000.00
U	Credits attempted (current award year)	Enter the credits <i>attempted</i> by the student during the current award year (the current award year is the award year for which the school is currently reporting).	4	134
V	Credits earned (current award year)	Enter the credits <i>earned</i> by the student during the current award year (the current award year is the award year for which the school is currently reporting).	4	134

Dual Enrollment

Column	Field	Instructions	Max Length	Example
W	Cumulative Credits earned (prior to award year)	Enter the cumulative credits <i>earned</i> by the student prior to the current award year (this amount would be the total number of credits earned prior to the student enrolling in this current award year).	4	134
X	Cumulative Credits earned (at end of award year)	Enter the cumulative credits <i>earned</i> by the student at the end of the current award year (this amount would be the total number of credits earned to date including this current award year).	4	134
Y	Student's Cum. GPA for last completed AY	Enter the student's cumulative grade point average (GPA) at the end of the award year for which the school is currently reporting). If you enter 4.0 then the cell might round to 4, that is fine.	1 value to the left of the decimal and 4 values to the right of decimal	3.4257
Z	Beginning of Award Year Enrollment status	Enter the enrollment status of the student at the beginning of the award year for which the school is currently reporting.  N = not enrolled F = full time T = $\frac{3}{4}$ time H = half time L = less than half time	1	F
AA	End of Award Year Enrollment Status	Enter the enrollment status of the student at the end of the award year for which the school is currently reporting.  N = not enrolled F = full time T = $\frac{3}{4}$ time H = half time L = less than half time	1	F
AB	Is this student participating in multiple experiments?	Enter "Y" for Yes or "N" for No.	1	Y
AC	List other experiments student is participating in (Experiment Numbers only)	List the experiment number(s) of the other experiments in which the student participates (See <a href="#">Appendix A</a> for the experiment numbers).  Leave blank if you answered "N" in Column AB.	10	08 09 13

## Dual Enrollment

Column	Field	Instructions	Max Length	Example
AD	Did the student complete the academic program associated with the student's participation in the experiment during this award year?	Enter "Y" if the applicant completed the academic program associated with the experiment during this award year (the award year in which the school is reporting).  Otherwise, enter "N"	1	Y
AE	Not eligible for Pell - Default	Enter "Y" if the applicant was not eligible for Pell due to Default status.  Otherwise, enter "N"	1	Y
AF	Not eligible for Pell - Selective Service	Enter "Y" if the applicant was not eligible for Pell due to Selective Service status.  Otherwise, enter "N"	1	Y
AG	Not eligible for Pell - Citizenship	Enter "Y" if the applicant was not eligible for Pell due to Citizenship status.  Otherwise, enter "N"	1	Y
AH	Not eligible for Pell - High school completion	Enter "Y" if the applicant was not eligible for Pell due to High School Completion status.  Otherwise, enter "N"	1	Y
AI	Not eligible for Pell - Drug conviction	Enter "Y" if the student was not eligible for Pell due to Drug Conviction status.  Otherwise, enter "N"	1	Y
AJ	Not eligible for Pell - EFC	Enter "Y" if the applicant was not eligible for Pell due to ineligible EFC.  Otherwise, enter "N"	1	Y

Dual Enrollment

Column	Field	Instructions	Max Length	Example
AK	Not eligible for Pell - Did not complete FAFSA	<p>Enter “Y” if the applicant did not successfully file a FAFSA to be considered for Pell. For example, the student was selected for but failed to complete verification.</p> <p>Otherwise, enter “N”</p> <p>Given the fact that students must complete a FAFSA to be considered for an experimental Pell Grant and completing a FAFSA is generally the first step ALL potential student participants take, a “Y” should only be entered in column AK if an applicant was selected for and failed to complete verification.</p>	1	Y
AL	Not eligible for Pell - Did not enroll in an eligible program	<p>Enter “Y” if the applicant was not eligible for Pell due to NOT enrolling in an eligible program.</p> <p>Otherwise, enter “N”</p>	1	Y
AM	Not eligible for Pell - Enrollment Status	<p>Enter “Y” if the applicant was not eligible for Pell due to Enrollment status.</p> <p>Otherwise, enter “N”</p>	1	Y
AN	High School Graduation Status at the end of the current Award Year	Enter “Y” for Graduated or “N” for Continuing High School.	1	Y
AO	High School Name	Enter the complete name of the high school attended by the student. Enter the first 70 characters of the high school name only.	70	Rolling Brook Senior High School
AP	High School Address	Enter the complete address, city, state, zip of the high school attended by the student. Enter the first 140 characters of the high school address only.	140	1234 Rolling Brook Rd, Arlington, VA 22204
AQ	High School National Center for Education Statistics (NCES) secondary school ID	Enter the NCES secondary school ID of the high school attended by the student.	15	00U4567UIO58954

Dual Enrollment

Column	Field	Instructions	Max Length	Example
AR	High School Local Education Agency (LEA) code	Enter the code for the LEA in which the high school attended by the student is located.	15	0K942J1P9125894
AS	Prior to participating in the experiment, was student dually enrolled in postsecondary and secondary school	Enter "Y" if the student was a dually enrolled student prior to participating in the experiment.  Otherwise, enter "N"	1	Y
AT	Intentionally Left Blank	Leave this Column blank unless the ESI Team notifies your institution to enter specific information in this column.	50	This field is intentionally left blank.

## Loan Counseling

Below you will find a data dictionary that defines each column. Please send a message to the Experimental Sites mailbox at [ExperimentalSites@ed.gov](mailto:ExperimentalSites@ed.gov) if you have any questions.

Column	Field	Instructions	Max Length	Example
A	Award Year (EXAMPLE: Use 2020 for 2019-2020)	Enter the four digits of the <i>last year of the current award year</i> (for 2019-2020 award year <i>enter 2020</i> ; for 2020-2021 enter 2021, etc.)	4	2020
B	Experiment Number	Enter the experiment number of the experiment in which the student participates. <i>Each template is pre-populated <b>on line 2</b> with the correct experiment number (see <a href="#">Appendix A</a> for a listing of all experiment numbers)</i>	2	12
C	OPEID	OPE ID – enter the eight digit OPE ID of the participating institution that signed the PPA Amendment	8	12345678
D	Student SSN	Enter the Social Security Number (9 digits, no dashes) for each student.  This field has been formatted as a “Text” field in Excel to accommodate students who have social security number with leading zeros. This column must remain a text field to upload properly.	9	123456789
E	Student Last Name	Enter the last name of the student.	35	Abraham
F	Student First Name	Enter the first name of the student.	30	John
G	Direct Costs	Enter the amount of Direct Costs for the student (Direct Costs are Institutional Costs). Examples of Direct Costs include tuition, fees, and room and board (if contracted with the school). Direct costs can also include expenses for required course materials (books, kits, tools, supplies, etc.) <i>if the student does not have a real and reasonable opportunity to purchase the required course materials from any place but the school.</i>	13	100235000000.00

Loan Counseling

Column	Field	Instructions	Max Length	Example
H	Indirect Costs	Enter the amount of Indirect Costs for the student (Indirect Costs are Non-institutional Costs). Examples of Indirect Costs include charges for any required course materials that a school can document a student had a real and reasonable opportunity to purchase elsewhere, charges to a student's account for group health insurance fees if the insurance is required for all students and the coverage remains in effect for the entire period for which the student was charged, despite the student's withdrawal, and charges to a student's account for discretionary, educationally related expenses (e.g., parking or library fines).	13	100235000000.00
I	Total Amount PLUS Loans Initially Awarded	Enter the amount of PLUS Loans <i>awarded</i> to the student.  If none, enter 0.	13	100235000000.00
J	Total Amount PLUS Loans Disbursed	Enter the amount of PLUS Loans <i>disbursed</i> on behalf of the student.  If none, enter 0.	13	100235000000.00
K	Total Amount FSEOG Initially Awarded	Enter the amount of FSEOG funds <i>awarded</i> to the student.  If none, enter 0.	13	100235000000.00
L	Total Amount FSEOG Disbursed	Enter the amount of FSEOG funds <i>disbursed</i> to the student.  If none, enter 0.	13	100235000000.00
M	Total Amount Perkins Initially Awarded	Enter the amount of Perkins funds <i>awarded</i> to the student.  If none, enter 0.	13	100235000000.00
N	Total Amount Perkins Disbursed	Enter the amount of Perkins funds <i>disbursed</i> to the student.  If none, enter 0.	13	100235000000.00
O	FWS Awarded	Enter the amount of FWS funds <i>awarded</i> to the student.  If none, enter 0.	13	100235000000.00

Loan Counseling

Column	Field	Instructions	Max Length	Example
P	FWS Disbursed	Enter the amount of FWS funds <i>disbursed</i> to the student  If none, enter 0.	13	100235000000.00
Q	Other Federal Aid Awarded	Enter the amount of other Federal Aid <i>awarded</i> to the student (besides FWS). Examples of other Federal aid include Pell Grant, FSEOG, Perkins, TEACH, Subsidized Direct Loan, Unsubsidized Direct Loan, Direct PLUS – Graduate Student and Direct PLUS - Parent). Be sure to only include awarded amounts. You will report amounts disbursed in a later column.  If none, enter 0.	13	100235000000.00
R	Other Federal Aid Disbursed	Enter the amount of other Federal Aid <i>disbursed</i> to the student (besides FWS). Examples of other Federal aid include Pell Grant, FSEOG, Perkins, TEACH, Subsidized Direct Loan, Unsubsidized Direct Loan, Direct PLUS – Graduate Student and Direct PLUS - Parent).  If none, enter 0.	13	100235000000.00
S	Non-Federal Aid Awarded	Enter the amount of other Non-Federal Aid <i>awarded</i> to the student. Examples of Non-Federal aid include institutional aid and outside scholarships). Be sure to only include awarded amounts. You will report amounts disbursed in a later column.  If none, enter 0.	13	100235000000.00
T	Non-Federal Aid Disbursed	Enter the amount of other Non-Federal Aid <i>disbursed</i> to the student. Examples of Non-Federal aid include institutional aid and outside scholarships).  If none, enter 0.	13	100235000000.00
U	Credits attempted (current award year)	Enter the credits <i>attempted</i> by the student during the current award year (the current award year is the award year for which the school is currently reporting).	4	134
V	Credits earned (current award year)	Enter the credits <i>earned</i> by the student during the current award year (the current award year is the award year for which the school is currently reporting).	4	134

Loan Counseling

Column	Field	Instructions	Max Length	Example
W	Cumulative Credits earned (prior to award year)	Enter the cumulative credits <i>earned</i> by the student prior to the current award year (this amount would be the total number of credits earned prior to the student enrolling in this current award year).	4	134
X	Cumulative Credits earned (at end of award year)	Enter the cumulative credits <i>earned</i> by the student at the end of the current award year (this amount would be the total number of credits earned to date including this current award year).	4	134
Y	Student's Cum. GPA for last completed AY	Enter the student's cumulative grade point average (GPA) at the end of the award year for which the school is currently reporting). If you enter 4.0 then the cell might round to 4, that is fine.	1 value to the left of the decimal and 4 values to the right of decimal	3.4257
Z	Beginning of Award Year Enrollment status	Enter the enrollment status of the student at the beginning of the award year for which the school is currently reporting.  N = not enrolled F = full time T = $\frac{3}{4}$ time H = half time L = less than half time	1	F
AA	End of Award Year Enrollment Status	Enter the enrollment status of the student at the end of the award year for which the school is currently reporting.  N = not enrolled F = full time T = $\frac{3}{4}$ time H = half time L = less than half time	1	F
AB	Is this student participating in multiple experiments?	Enter "Y" for Yes or "N" for No.	1	Y

Loan Counseling

Column	Field	Instructions	Max Length	Example
AC	List other experiments student is participating in (Experiment Numbers only)	List the experiment number(s) of the other experiments in which the student participates (See <b>Appendix A</b> for the experiment numbers).  Leave blank if you answered “N” in Column AB.	10	08 09 13
AD	Did the student complete the academic program associated with the student’s participation in the experiment during this award year?	Enter “Y” if the applicant completed the academic program associated with the experiment during this award year (the award year in which the school is reporting).  Otherwise, enter “N”	1	Y
AE	Assigned Status	Enter the assigned status for the student. Enter “T” if the student was assigned to the Treatment group or “C” if the student was assigned to the Control group.	1	T
AF	Student received voluntary loan counseling during the most recently completed award year?	Enter “Y” if the student received voluntary loan counseling during the most recently completed award year.  Otherwise, enter “N”	1	Y
AG	Intentionally Left Blank	Leave this Column blank unless the ESI Team notifies your institution to enter specific information in this column.	50	This field is intentionally left blank.

## Limiting Unsubsidized Loans

Below you will find a data dictionary that defines each column. Please send a message to the Experimental Sites mailbox at [ExperimentalSites@ed.gov](mailto:ExperimentalSites@ed.gov) if you have any questions.

Column	Field	Instructions	Max Length	Example
A	Award Year (EXAMPLE: Use 2020 for 2019-2020)	Enter the four digits of the <i>last year of the current award year</i> (for 2019-2020 award year enter 2020; for 2020-2021 enter 2021, etc.)	4	2020
B	Experiment Number	Enter the experiment number of the experiment in which the student participates. <i>Each template is pre-populated <b>on line 2</b> with the correct experiment number (see Appendix A for a listing of all experiment numbers)</i>	2	12
C	OPEID	OPE ID – enter the eight digit OPE ID of the participating institution that signed the PPA Amendment	8	12345678
D	Student SSN	Enter the Social Security Number (9 digits, no dashes) for each student.  This field has been formatted as a “Text” field in Excel to accommodate students who have social security number with leading zeros. This column must remain a text field to upload properly.	9	123456789
E	Student Last Name	Enter the last name of the student.	35	Abraham
F	Student First Name	Enter the first name of the student.	30	John
G	Direct Costs	Enter the amount of Direct Costs for the student (Direct Costs are Institutional Costs). Examples of Direct Costs include tuition, fees, and room and board (if contracted with the school). Direct costs can also include expenses for required course materials (books, kits, tools, supplies, etc.) <i>if the student does not have a real and reasonable opportunity to purchase the required course materials from any place but the school.</i>	13	100235000000.00

Limiting Unsubsidized Loans

Column	Field	Instructions	Max Length	Example
H	Indirect Costs	Enter the amount of Indirect Costs for the student (Indirect Costs are Non-institutional Costs). Examples of Indirect Costs include charges for any required course materials that a school can document a student had a real and reasonable opportunity to purchase elsewhere, charges to a student's account for group health insurance fees if the insurance is required for all students and the coverage remains in effect for the entire period for which the student was charged, despite the student's withdrawal, and charges to a student's account for discretionary, educationally related expenses (e.g., parking or library fines).	13	100235000000.00
I	Total Amount PLUS Loans Initially Awarded	Enter the amount of PLUS Loans <i>awarded</i> to the student.  If none, enter 0.	13	100235000000.00
J	Total Amount PLUS Loans Disbursed	Enter the amount of PLUS Loans <i>disbursed</i> on behalf of the student.  If none, enter 0.	13	100235000000.00
K	Total Amount FSEOG Initially Awarded	Enter the amount of FSEOG funds <i>awarded</i> to the student.  If none, enter 0.	13	100235000000.00
L	Total Amount FSEOG Disbursed	Enter the amount of FSEOG funds <i>disbursed</i> to the student.  If none, enter 0.	13	100235000000.00
M	Total Amount Perkins Initially Awarded	Enter the amount of Perkins funds <i>awarded</i> to the student.  If none, enter 0.	13	100235000000.00
N	Total Amount Perkins Disbursed	Enter the amount of Perkins funds <i>disbursed</i> to the student.  If none, enter 0.	13	100235000000.00
O	FWS Awarded	Enter the amount of FWS funds <i>awarded</i> to the student.  If none, enter 0.	13	100235000000.00

Limiting Unsubsidized Loans

Column	Field	Instructions	Max Length	Example
P	FWS Disbursed	Enter the amount of FWS funds <i>disbursed</i> to the student  If none, enter 0.	13	100235000000.00
Q	Other Federal Aid Awarded	Enter the amount of other Federal Aid <i>awarded</i> to the student (besides FWS). Examples of other Federal aid include Pell Grant, FSEOG, Perkins, TEACH, Subsidized Direct Loan, Unsubsidized Direct Loan, Direct PLUS – Graduate Student and Direct PLUS - Parent). Be sure to only include awarded amounts. You will report amounts disbursed in a later column.  If none, enter 0.	13	100235000000.00
R	Other Federal Aid Disbursed	Enter the amount of other Federal Aid <i>disbursed</i> to the student (besides FWS). Examples of other Federal aid include Pell Grant, FSEOG, Perkins, TEACH, Subsidized Direct Loan, Unsubsidized Direct Loan, Direct PLUS – Graduate Student and Direct PLUS - Parent).  If none, enter 0.	13	100235000000.00
S	Non-Federal Aid Awarded	Enter the amount of other Non-Federal Aid <i>awarded</i> to the student. Examples of Non-Federal aid include institutional aid and outside scholarships). Be sure to only include awarded amounts. You will report amounts disbursed in a later column.  If none, enter 0.	13	100235000000.00
T	Non-Federal Aid Disbursed	Enter the amount of other Non-Federal Aid <i>disbursed</i> to the student. Examples of Non-Federal aid include institutional aid and outside scholarships).  If none, enter 0.	13	100235000000.00
U	Credits attempted (current award year)	Enter the credits <i>attempted</i> by the student during the current award year (the current award year is the award year for which the school is currently reporting).	4	134
V	Credits earned (current award year)	Enter the credits <i>earned</i> by the student during the current award year (the current award year is the award year for which the school is currently reporting).	4	134

Limiting Unsubsidized Loans

Column	Field	Instructions	Max Length	Example
W	Cumulative Credits earned (prior to award year)	Enter the cumulative credits <i>earned</i> by the student prior to the current award year (this amount would be the total number of credits earned prior to the student enrolling in this current award year).	4	134
X	Cumulative Credits earned (at end of award year)	Enter the cumulative credits <i>earned</i> by the student at the end of the current award year (this amount would be the total number of credits earned to date including this current award year).	4	134
Y	Student's Cum. GPA for last completed AY	Enter the student's cumulative grade point average (GPA) at the end of the award year for which the school is currently reporting). If you enter 4.0 then the cell might round to 4, that is fine.	1 value to the left of the decimal and 4 values to the right of decimal	3.4257
Z	Beginning of Award Year Enrollment status	Enter the enrollment status of the student at the beginning of the award year for which the school is currently reporting.  N = not enrolled F = full time T = $\frac{3}{4}$ time H = half time L = less than half time	1	F
AA	End of Award Year Enrollment Status	Enter the enrollment status of the student at the end of the award year for which the school is currently reporting.  N = not enrolled F = full time T = $\frac{3}{4}$ time H = half time L = less than half time	1	F
AB	Is this student participating in multiple experiments?	Enter "Y" for Yes or "N" for No.	1	Y

Limiting Unsubsidized Loans

Column	Field	Instructions	Max Length	Example
AC	List other experiments student is participating in (Experiment Numbers only)	List the experiment number(s) of the other experiments in which the student participates (See <a href="#">Appendix A</a> for the experiment numbers).  Leave blank if you answered "N" in Column AB.	10	08 09 13
AD	Did the student complete the academic program associated with the student's participation in the experiment during this award year?	Enter "Y" if the applicant completed the academic program associated with the experiment during this award year (the award year in which the school is reporting).  Otherwise, enter "N"	1	Y
AE	What was the institution's reason for reducing the FAFSA applicant's unsubsidized Direct Loan eligibility?	Enter the institution's reason for reducing the FAFSA applicant's unsubsidized Direct Loan eligibility. This field is limited to 42 characters.	42	First year student
AF	What was the dollar amount of the FAFSA applicant's experimental reduction in unsubsidized Direct Loan eligibility?	Enter the dollar amount of the FAFSA applicant's experimental reduction in unsubsidized Direct Loan eligibility.	8	999,999.99
AG	Intentionally Left Blank	Leave this Column blank unless the ESI Team notifies your institution to enter specific information in this column.	50	This field is intentionally left blank.

## Federal Work-Study

Below you will find a data dictionary that defines each column. Please send a message to the Experimental Sites mailbox at [ExperimentalSites@ed.gov](mailto:ExperimentalSites@ed.gov) if you have any questions.

Column	Field	Instructions	Max Length	Example
A	Award Year (EXAMPLE: Use 2020 for 2019-2020)	Enter the four digits of the <i>last year of the current award year</i> (for 2019-2020 award year <i>enter 2020</i> ; for 2020-2021 enter 2021, etc.)	4	2020
B	Experiment Number	Enter the experiment number of the experiment in which the student participates. <i>Each template is pre-populated on line 2 with the correct experiment number (see Appendix A for a listing of all experiment numbers)</i>	2	12
C	OPEID	OPE ID – enter the eight digit OPE ID of the participating institution that signed the PPA Amendment	8	12345678
D	Student SSN	Enter the Social Security Number (9 digits, no dashes) for each student.  This field has been formatted as a “Text” field in Excel to accommodate students who have social security number with leading zeros. This column must remain a text field to upload properly.	9	123456789
E	Student Last Name	Enter the last name of the student.	35	Abraham
F	Student First Name	Enter the first name of the student.	30	John
G	Direct Costs	Enter the amount of Direct Costs for the student (Direct Costs are Institutional Costs). Examples of Direct Costs include tuition, fees, and room and board (if contracted with the school). Direct costs can also include expenses for required course materials (books, kits, tools, supplies, etc.) <i>if the student does not have a real and reasonable opportunity to purchase the required course materials from any place but the school.</i>	13	100235000000.00

Federal Work-Study

Column	Field	Instructions	Max Length	Example
H	Indirect Costs	Enter the amount of Indirect Costs for the student (Indirect Costs are Non-institutional Costs). Examples of Indirect Costs include charges for any required course materials that a school can document a student had a real and reasonable opportunity to purchase elsewhere, charges to a student's account for group health insurance fees if the insurance is required for all students and the coverage remains in effect for the entire period for which the student was charged, despite the student's withdrawal, and charges to a student's account for discretionary, educationally related expenses (e.g., parking or library fines).	13	100235000000.00
I	Total Amount PLUS Loans Initially Awarded	Enter the amount of PLUS Loans <i>awarded</i> to the student. If none, enter 0.	13	100235000000.00
J	Total Amount PLUS Loans Disbursed	Enter the amount of PLUS Loans <i>disbursed</i> on behalf of the student. If none, enter 0.	13	100235000000.00
K	Total Amount FSEOG Initially Awarded	Enter the amount of FSEOG funds <i>awarded</i> to the student. If none, enter 0.	13	100235000000.00
L	Total Amount FSEOG Disbursed	Enter the amount of FSEOG funds <i>disbursed</i> to the student. If none, enter 0.	13	100235000000.00
M	Total Amount Perkins Initially Awarded	Enter the amount of Perkins funds <i>awarded</i> to the student. If none, enter 0.	13	100235000000.00
N	Total Amount Perkins Disbursed	Enter the amount of Perkins funds <i>disbursed</i> to the student. If none, enter 0.	13	100235000000.00
O	FWS Awarded	Enter the amount of FWS funds <i>awarded</i> to the student.  If none, enter 0.	13	100235000000.00

Federal Work-Study

Column	Field	Instructions	Max Length	Example
P	FWS Disbursed	Enter the amount of FWS funds <i>disbursed</i> to the student  If none, enter 0.	13	100235000000.00
Q	Other Federal Aid Awarded	Enter the amount of other Federal Aid <i>awarded</i> to the student (besides FWS). Examples of other Federal aid include Pell Grant, FSEOG, Perkins, TEACH, Subsidized Direct Loan, Unsubsidized Direct Loan, Direct PLUS – Graduate Student and Direct PLUS - Parent). Be sure to only include awarded amounts. You will report amounts disbursed in a later column.  If none, enter 0.	13	100235000000.00
R	Other Federal Aid Disbursed	Enter the amount of other Federal Aid <i>disbursed</i> to the student (besides FWS). Examples of other Federal aid include Pell Grant, FSEOG, Perkins, TEACH, Subsidized Direct Loan, Unsubsidized Direct Loan, Direct PLUS – Graduate Student and Direct PLUS - Parent).  If none, enter 0.	13	100235000000.00
S	Non-Federal Aid Awarded	Enter the amount of other Non-Federal Aid <i>awarded</i> to the student. Examples of Non-Federal aid include institutional aid and outside scholarships). Be sure to only include awarded amounts. You will report amounts disbursed in a later column.  If none, enter 0.	13	100235000000.00
T	Non-Federal Aid Disbursed	Enter the amount of other Non-Federal Aid <i>disbursed</i> to the student. Examples of Non-Federal aid include institutional aid and outside scholarships).  If none, enter 0.	13	100235000000.00
U	Credits attempted (current award year)	Enter the credits <i>attempted</i> by the student during the current award year (the current award year is the award year for which the school is currently reporting).	4	134
V	Credits earned (current award year)	Enter the credits <i>earned</i> by the student during the current award year (the current award year is the award year for which the school is currently reporting).	4	134
W	Cumulative Credits earned (prior to award year)	Enter the cumulative credits <i>earned</i> by the student prior to the current award year (this amount would be the total number of credits earned prior to the student enrolling in this current award year).	4	134

Federal Work-Study

Column	Field	Instructions	Max Length	Example
X	Cumulative Credits earned (at end of award year)	Enter the cumulative credits <i>earned</i> by the student at the end of the current award year (this amount would be the total number of credits earned to date including this current award year).	4	134
Y	Student's Cum. GPA for last completed AY	Enter the student's cumulative grade point average (GPA) at the end of the award year for which the school is currently reporting). If you enter 4.0 then the cell might round to 4, that is fine.	1 value to the left of the decimal and 4 values to the right of decimal	3.4257
Z	Beginning of Award Year Enrollment status	Enter the enrollment status of the student at the beginning of the award year for which the school is currently reporting.  N = not enrolled F = full time T = ¾ time H = half time L = less than half time	1	F
AA	End of Award Year Enrollment Status	Enter the enrollment status of the student at the end of the award year for which the school is currently reporting.  N = not enrolled F = full time T = ¾ time H = half time L = less than half time	1	F
AB	Is this student participating in multiple experiments?	Enter "Y" for Yes or "N" for No.	1	Y
AC	List other experiments student is participating in (Experiment Numbers only)	List the experiment number(s) of the other experiments in which the student participates (See <a href="#">Appendix A</a> for the experiment numbers).  Leave blank if you answered "N" in Column AB.	10	08 09 13

Federal Work-Study

Column	Field	Instructions	Max Length	Example
AD	Did the student complete the academic program associated with the student's participation in the experiment during this award year?	Enter "Y" if the applicant completed the academic program associated with the experiment during this award year (the award year in which the school is reporting).  Otherwise, enter "N"	1	Y
AE	Student's program of study.	Enter the Student's program of study. Enter the first 40 characters of your school's name for the student's program of study. For example: Nursing AAS; Pharmacy Technician Certificate Program; etc.	40	Nursing
AF	CIP code of the student's program of study	Enter the CIP code(s) of the approved program(s) in which the student was enrolled during the most recently completed award year (the award year in which the school is reporting).	42	12.3456
AG	Total FWS positions during the award year?	How many FWS positions did the student hold in TOTAL (including those affected by the experiment AND those not affected by any waiver) during the award year?	2	1
AH	For the FWS position for which the student worked the greatest number of hours (FWS1), was FWS1 affected by the experiment?	For the FWS position for which the student worked the greatest number of hours, was this FWS position affected by the experiment?  Enter "Y" for yes. Otherwise, enter "N" for no.	1	Y
AI	FWS1: Type	For the FWS position for which the student worked the greatest number of hours, was the position: A. From a Job Location and Development (JLD) program B. A community service position C. Required for completion of their academic program D. None of the above	1	A

Federal Work-Study

Column	Field	Instructions	Max Length	Example
AJ	FWS1: Required	If the position was required for completion of their academic program, was it (mark one): A. Student teaching B. Clinical rotation C. Apprenticeship D. Internship/externship E. None of the above	1	A
AK	FWS1: Employer Type	For the FWS position for which the student worked the greatest number of hours: Please select the type of employer: A. Postsecondary Institution B. federal, state or public agency C. private nonprofit organization D. a private for-profit organization E. Other	1	A
AL	FWS1: Job Location	For the FWS position for which the student worked the greatest number of hours: Was the job location primarily: A. On-campus B. Off-campus	1	A
AM	FWS1: Employer Name	For the FWS position for which the student worked the greatest number of hours, what was the name of the employer? Enter the first 40 characters of the name of the employer. For example: Name of Institution Participating in the Experiment; Our Regional Employment Commission; Name of for-profit organization; etc.	40	ABC Employer, LLC
AN	FWS1: Total Wages	For the FWS position for which the student worked the greatest number of hours: What were the total wages earned by the student during the award year?	10.2	1234.50
AO	FWS1: Total Hours	For the FWS position for which the student worked the greatest number of hours: What were the total number of hours worked by the student during the award year?	8	85
AP	FWS1: Credits	How many credits did the student earn for the FWS position for which the student worked the greatest number of hours?	8	1

Federal Work-Study

Column	Field	Instructions	Max Length	Example
AQ	FWS1: SOC Code	<p>For the FWS position for which the student worked the greatest number of hours: Please categorize the student’s job using the 2018 group SOC codes?</p> <p>2018 SOC major groups Code Title 11-0000 Management Occupations 13-0000 Business and Financial Operations Occupations 15-0000 Computer and Mathematical Occupations 17-0000 Architecture and Engineering Occupations 19-0000 Life, Physical, and Social Science Occupations 21-0000 Community and Social Service Occupations 23-0000 Legal Occupations 25-0000 Educational Instruction and Library Occupations 27-0000 Arts, Design, Entertainment, Sports, and Media Occupations 29-0000 Healthcare Practitioners and Technical Occupations 31-0000 Healthcare Support Occupations 33-0000 Protective Service Occupations 35-0000 Food Preparation and Serving Related Occupations 37-0000 Building and Grounds Cleaning and Maintenance Occupations 39-0000 Personal Care and Service Occupations 41-0000 Sales and Related Occupations 43-0000 Office and Administrative Support Occupations 45-0000 Farming, Fishing, and Forestry Occupations 47-0000 Construction and Extraction Occupations 49-0000 Installation, Maintenance, and Repair Occupations 51-0000 Production Occupations 53-0000 Transportation and Material Moving Occupations 55-0000 Military Specific Occupations</p>	8	11-0000
AR	FWS1: Covid19R	<p>For the FWS position for which the student worked the greatest number of hours, did COVID-19 prevent the student from completing their scheduled hours?</p> <p>Enter “Y” for yes. Otherwise, enter “N”</p>	1	Y
AS	FWS1: Covid19R\$	<p>If yes, did the student continue to receive FWS wages?</p> <p>Enter “Y” for yes or “N” for no. Otherwise enter “N/A” for not applicable.</p>	3	Y

Federal Work-Study

Column	Field	Instructions	Max Length	Example
AT	For the FWS position for which the student worked the second most number of hours (FWS2), was FWS2 affected by the experiment?	For the FWS position for which the student worked the 2 <sup>nd</sup> most hours, was this FWS position affected by the experiment?  Enter "Y" for yes. Otherwise, enter "N"	1	Y
AU	FWS2: Type	For the FWS position for which the student worked the 2 <sup>nd</sup> most number of hours, was the position: A. From a Job Location and Development (JLD) program B. A community service position C. Required for completion of their academic program D. None of the above	1	A
AV	FWS2: Required	If the position was required for completion of their academic program, was it (mark one): A. Student teaching B. Clinical rotation C. Apprenticeship D. Internship/externship E. None of the above	1	A
AW	FWS2: Employer Type	For the FWS position for which the student worked the 2 <sup>nd</sup> most hours: Who was the employer? A. Postsecondary Institution B. federal, state or public agency C. private nonprofit organization D. a private for-profit organization E. Other	1	A
AX	FWS2: Job Location	For the FWS position for which the student worked the 2 <sup>nd</sup> most hours: Was the job location primarily: A. On campus B. Off campus	1	A
AY	FWS2: Employer Name	For the FWS position for which the student worked the 2 <sup>nd</sup> most hours, what was the name of the employer?  Enter the first 40 characters of the name of the employer. For example: Name of Institution Participating in the Experiment; Our Regional Employment Commission; Name of for-profit organization; etc.	40	ABC Employer, LLC
AZ	FWS2: Total Wages	For the FWS position for which the student worked the 2 <sup>nd</sup> most hours:  What were the total wages earned by the student during the award year?	10.2	1234.50

Federal Work-Study

Column	Field	Instructions	Max Length	Example
BA	FWS2: Total Hours	For the FWS position for which the student worked the 2nd most hours: What were the total number of hours worked by the student during the award year?	8	85
BB	FWS2: Credits	How many credits did the student earn for the FWS position for which the student worked the 2nd most hours?	8	12
BC	FWS2: SOC Code	For the FWS position for which the student worked the 2nd most hours Please categorize the student's job using the 2018 group SOC codes? (allow for N/A) 2018 SOC major groups Code Title 11-0000 Management Occupations 13-0000 Business and Financial Operations Occupations 15-0000 Computer and Mathematical Occupations 17-0000 Architecture and Engineering Occupations 19-0000 Life, Physical, and Social Science Occupations 21-0000 Community and Social Service Occupations 23-0000 Legal Occupations 25-0000 Educational Instruction and Library Occupations 27-0000 Arts, Design, Entertainment, Sports, and Media Occupations 29-0000 Healthcare Practitioners and Technical Occupations 31-0000 Healthcare Support Occupations 33-0000 Protective Service Occupations 35-0000 Food Preparation and Serving Related Occupations 37-0000 Building and Grounds Cleaning and Maintenance Occupations 39-0000 Personal Care and Service Occupations 41-0000 Sales and Related Occupations 43-0000 Office and Administrative Support Occupations 45-0000 Farming, Fishing, and Forestry Occupations 47-0000 Construction and Extraction Occupations 49-0000 Installation, Maintenance, and Repair Occupations 51-0000 Production Occupations 53-0000 Transportation and Material Moving Occupations 55-0000 Military Specific Occupations	8	11-0000

Federal Work-Study

Column	Field	Instructions	Max Length	Example
BD	FWS2: Covid19R	For the FWS position for which the student worked the 2nd most hours, did COVID-19 prevent the student from completing their scheduled hours?  Enter "Y" for yes. Otherwise, enter "N"	1	Y
BE	FWS2: Covid19R\$	If yes, did the student continue to receive FWS wages?  Enter "Y" for yes or "N" for no. Otherwise enter "N/A" for not applicable.	3	Y
BF	For the FWS position for which the student worked the third most number of hours (FWS3), was FWS3 affected by the experiment?	For the FWS position for which the student worked the 3rd most hours, was this FWS position affected by the experiment?  Enter "Y" for yes. Otherwise, enter "N"	1	Y
BG	FWS3: Type	For the FWS position for which the student worked the 3 <sup>rd</sup> most number of hours, was the position: A. From a Job Location and Development (JLD) program B. A community service position C. Required for completion of their academic program D. None of the above	1	A
BH	FWS3: Required	If the position was required for completion of their academic program, was it (mark one): A. Student teaching B. Clinical rotation C. Apprenticeship D. Internship/externship E. None of the above	1	A
BI	FWS3: Employer Type	For the FWS position for which the student worked the 3 <sup>rd</sup> most hours: Who was the employer? A. Postsecondary Institution B. federal, state or public agency C. private nonprofit organization D. a private for-profit organization E. Other	1	A
BJ	FWS3: Job Location	For the FWS position for which the student worked the 2nd most hours: Was the job location primarily: A. On campus B. Off campus	1	A

Federal Work-Study

Column	Field	Instructions	Max Length	Example
BK	FWS3: Employer Name	For the FWS position for which the student worked the 3rd most hours, what was the name of the employer?  Enter the first 40 characters of the name of the employer. For example: Name of Institution Participating in the Experiment; Our Regional Employment Commission; Name of for-profit organization; etc.	40	ABC Employer, LLC
BL	FWS3: Total Wages	What were the total wages earned by the student during the award year?	10.2	1234.50
BM	FWS3: Total Hours	For the FWS position for which the student worked the 3rd most hours: What were the total number of hours worked by the student during the award year?	8	85
BN	FWS3: Credits	How many credits did the student earn for the FWS position for which the student worked the 3rd most hours?	8	12
BO	FWS3: SOC Code	For the FWS position for which the student worked the 3rd most hours  Please categorize the student's job using the 2018 group SOC codes? (allow for N/A)  2018 SOC major groups Code Title 11-0000 Management Occupations 13-0000 Business and Financial Operations Occupations 15-0000 Computer and Mathematical Occupations 17-0000 Architecture and Engineering Occupations 19-0000 Life, Physical, and Social Science Occupations 21-0000 Community and Social Service Occupations 23-0000 Legal Occupations 25-0000 Educational Instruction and Library Occupations 27-0000 Arts, Design, Entertainment, Sports, and Media Occupations 29-0000 Healthcare Practitioners and Technical Occupations 31-0000 Healthcare Support Occupations 33-0000 Protective Service Occupations 35-0000 Food Preparation and Serving Related Occupations 37-0000 Building and Grounds Cleaning and	8	11-0000

Federal Work-Study

Column	Field	Instructions	Max Length	Example
		Maintenance Occupations 39-0000 Personal Care and Service Occupations 41-0000 Sales and Related Occupations  43-0000 Office and Administrative Support Occupations 45-0000 Farming, Fishing, and Forestry Occupations 47-0000 Construction and Extraction Occupations 49-0000 Installation, Maintenance, and Repair Occupations 51-0000 Production Occupations 53-0000 Transportation and Material Moving Occupations 55-0000 Military Specific Occupations		
BP	FWS3: Covid19R	For the FWS position for which the student worked the 3rd most hours, did COVID-19 prevent the student from completing their scheduled hours?  Enter "Y" for yes. Otherwise, enter "N"	1	Y
BQ	FWS3: Covid19R\$	If yes, did the student continue to receive FWS wages?  Enter "Y" for yes or "N" for no. Otherwise enter "N/A" for not applicable.	3	Y
BR	Intentionally left blank	The ESI Team originally intended to leave Column BR blank, but the Excel Template fails to capture some of the detail desired for up to three federal work-study positions held by each student. Therefore, the ESI Team is asking schools to report that information in column BR.  Please provide <b>BOTH</b> the item identifier (for example, 1Wv) along with the response (for example, A) with no spaces, as field BR is limited to 50 characters. See examples for proper formatting.  1Wv: For the FWS position that the student worked the greatest number of hours, which of the experiment's waivers applied? (list all that apply) A. 34 CFR 675, greater than part-time employment B. 34 CFR 675.26(a)(3), federal share of the compensation in excess of 25 percent C. Neither	50	1WvA1Wg2000 2WvB2Wg1500 3WvAB3Wg1000 Additional Employer #1 Additional Employer #2  <b>*In excel, please use only one line with no spaces between responses:</b> 1WvA1Wg20002WvB2Wg1500  For questions or assistance, please email the ESI Team at <a href="mailto:ExperimentalSites@ed.gov">ExperimentalSites@ed.gov</a> .

Federal Work-Study

Column	Field	Instructions	Max Length	Example
		<p>1Wg: For the FWS position that the student worked the 2<sup>nd</sup> most number of hours, what amount of total wages was paid by FWS?</p> <p><b>No further information is required if the student did not have more than one FWS position.</b></p> <p>2Wv: For the FWS position that the student worked the 2<sup>nd</sup> most number of hours, which of the experiment's waivers applied? (list all that apply)</p> <ul style="list-style-type: none"> <li>A. 34 CFR 675, greater than part-time employment</li> <li>B. 34 CFR 675.26(a)(3), federal share of the compensation in excess of 25 percent</li> <li>C. Neither</li> </ul> <p>2Wg: For the FWS position that the student worked the 2<sup>nd</sup> most number of hours, what amount of total wages was paid by FWS?</p> <p><b>No further information is required if the student did not have more than two FWS positions.</b></p> <p>3Wv: For the FWS position that the student worked the 3<sup>rd</sup> most number of hours, which of the experiment's waivers applied? (list all that apply)</p> <ul style="list-style-type: none"> <li>A. 34 CFR 675, greater than part-time employment</li> <li>B. 34 CFR 675.26(a)(3), federal share of the compensation in excess of 25 percent</li> <li>C. Neither</li> </ul> <p>3Wg: For the FWS position that the student worked the 3<sup>rd</sup> most number of hours, what amount of total wages was paid by FWS?</p> <p><b>No further information is required if the student did not have more than three FWS positions.</b></p> <p>Please list the names of any additional employers who employed the student under the FWS experiment?</p>	50	<p>1WvA1Wg2000 2WvB2Wg1500 3WvAB3Wg1000 Additional Employer #1 Additional Employer #2</p> <p><b>*In excel, please use only one line with no spaces between responses:</b></p> <p>1WvA1Wg20002WvB2Wg1500</p> <p>For questions or assistance, please email the ESI Team at <a href="mailto:ExperimentalSites@ed.gov">ExperimentalSites@ed.gov</a>.</p>

## Appendix A: Experiment Numbers and Titles

Experiments active in the 2020-2021 award year are highlighted in green.

Experiment Number	Experiment Title
01	Ability to Benefit
02	Academic Term
03	Aid to Prior Institutional Charges
04	Aid to Prior Term Charges
05	Automatic Pay - (FWS)
06	Entrance Counseling
07	Exit Counseling
09	Loan Fees
10	Loan Proration
11	Multiple Disbursement
12	Over-award
13	30 Day Delay
14	Time Records - (FWS)
15	Pell Elig Students with Bachelor Degree Enrolled in Career Programs
16	Pell Elig Students Enrolled in Approved Short-term Training Programs
17	DL Single Disbursement of One Term Loan for Study Abroad Students
18	DL Early Disbursement - Students Studying Abroad and Foreign Schools
19	Direct Loan - Unequal Disbursements
20	Direct Loan - Limiting Unsubsidized Loan Amounts
21	PLUS Loans for Parents of Students with Intellectual Disabilities
22	Eligibility of Dually Enrolled Students with Intellectual Disabilities
23	Prior Learning Assessment
24	Competency-Based Education - Split Disbursement
25	Limited Direct Assessment
26	Federal Work-Study (FWS) for Near-Peer Counseling
27	Second Chance Pell
28	EQUIP (Educational Quality through Innovative Partnerships)
29	Dual Enrollment
30	CBE - Satisfactory Academic Progress Only
31	CBE - Subscription Period Disbursement
32	Loan Counseling
33	Federal Work-Study

## Appendix B: Error Troubleshooting

Below are common errors and suggestions for how to fix them. If you have any questions, send a message to the Experimental Sites team at [ExperimentalSites@ed.gov](mailto:ExperimentalSites@ed.gov).

Error Message	Suggestion
Invalid File – File format was not recognized or was unreadable	<p>Make sure you have downloaded the most recent template in COD. Do not change the formatting of the file and do not password protect it.</p> <p>The name of the file must be something different than the file name of when you downloaded the template.</p>
Invalid Student SSN- SSN is non numerical	<p>If a student has a social security number with leading zeros, these leading zeros must be included.</p> <p>Column D is formatted as a “Text” field in excel in order to accommodate leading zeros. Make sure this formatting does not change when you are completing this column.</p> <p>The SSN should be entered with no dashes.</p>
Invalid Student Last Name – Does not match SSN	<p>The upload process will look for an exact character match, so if a student has a dash or apostrophe in their last name it will need to be included.</p> <p>If a student changed their name after enrolling at your school you need to have the last name that is in COD on your upload file.</p> <p>If you are unsure of the exact spelling or need to look up a former name of a student, you can do a person search on COD Web via SSN.</p>
Invalid School OPEID – OPEID is non numerical or does not exist within COD System	<p>Column C is formatted as a “Text” field in Excel in order to accommodate leading zeros. Make sure to keep this formatting.</p> <p>Only the main campus (the school with the OPE ID that is approved for the experiment) can submit the template in COD.</p>