INACIAL DIALIBASE Training Manual

Prepared by the Division of Student Services

TX Higher Education Coordinating Board

Contact Person: Tanya Sifuentes

System Support Specialist

tanya.sifuentes@thecb.state.tx.us 512/427-6123 or 800/242-3062 x6123 You may START submitting your files as of July 1.

The Financial Aid Database Report must be submitted and ERROR FREE by:

October 15

of each year.

ALL RECONCILIATIONS TO YEAR END PROGRAM REPORTS MUST BE COMPLETED AND YOUR FILE CERTIFIED BY NOVEMBER 1.

The report contains data for individual students from the previous academic year.

IF DEADLINES ABOVE ARE NOT MET, PENALTIES WILL BE INVOKED.

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THE STATUTORY REQUIREMENT

Rider 13, Page III-50 of the current Appropriations Act directs the Coordinating Board to present an annual report to the Legislative Budget Board by August 1 of each calendar year concerning student financial aid at Texas public and independent institutions of higher education.

Institutional and statewide reports are required annually. The resulting financial aid database provides the state a means of accurately measuring the resources available to Texas students through financial aid, and is being used more and more as a basis for equitably distributing state aid resources among institutions. The database allows us to generate statewide, sector and individual institution reports.

From Senate Bill 1227, 79th Legislature, Regular Session:

Section 61.066, Education Code, is amended by adding Subsection (c) to read as follows:

(c) The board shall conduct a biennial study to determine the total cost of attending each institution of higher education and the resources used by students to cover that cost, including the amounts of money received by students at each institution from the major sources of public and private financial aid, including grants, loans, scholarships, gifts, and work-study programs. In conducting the study, the board shall solicit information and comments from the financial aid office at each institution of higher education. Not later than November 1 of each even-numbered year, the board shall report the findings of the study to each legislative standing committee and subcommittee with primary jurisdiction over higher education.

CONTENTS OF STUDENT RECORDS

DATA ELEMENTS AND CURRENT FIELD LIMITATIONS

Data Elements and Current Field Limitations

Please provide the requested data for each person at your institution receiving any type of need-based aid or any aid for which a need assessment is required. **Shaded Elements have to be reported.**

Data Element	Field Layout	Instructions	Error Listing Messages
Student Social Security Number or ID Number COLUMN 1-9	99999999	numeric; right justified response required if student has no SSN, assign a 9- digit ID number composed of school FICE code +3 trailing digits. BE CONSISTENT WITH IDs REPORTED ON CBM, TEXAS GRANT YEAR-END AND ANY OTHER REPORTS SUBMITTED TO THE CB.	error if non-numeric error if (social-security-number = 0) and ((county-code-perm-address < 401) and (county-code-perm-address > 0))
Student Income Earned from Work COLUMN 10-15	999999 If your records include the details shown in data element #s 2-13, please report them, giving adjusted gross income in data element #s 2,3,8 and 9. If you cannot provide the full breakdown, report the Total Income figure you use on the FISAP in data element #2 and leave data element #s 3-13 blank.	numeric; right justified rounded to full dollar amounts if blank, will assume to = 0 ADVICE: Provide Total Income as reported on FISAP in data element # 2 and leave data element #s 3-13 blank.	error if non-numeric warning if negative value error if >888,888 warning if > 200,000
Spouse Income Earned from Work COLUMN 16-21	999999	numeric; right justified rounded to full dollar amounts if blank, will assume to = 0 See ADVICE for data element # 2.	error if non-numeric error if >200,000
Social Security Benefits for Student and/or Spouse COLUMN 22-26	99999	numeric; right justified rounded to full dollar amounts if blank, will assume to = 0 See ADVICE for data element # 2.	error if non-numeric error if >30,000
5. Aid to Families with Dependent Children (AFDC or ADC) for Student and/or Spouse COLUMN 27-31	99999	numeric; right justified rounded to full dollar amounts if blank, will assume to = 0 See ADVICE for data element # 2.	error if non-numeric error if >30,000

Data Element	Field Layout	Instructions	Error Listing Messages
6. Child Support Received for All Children by Student and/or Spouse COLUMN 32-36	99999	numeric; right justified rounded to full dollar amounts if blank, will assume to = 0 See ADVICE for data element # 2.	error if non-numeric error if >30,000
7. Other Untaxed Income and Benefits for Student and/or Spouse COLUMN 37-41	99999	numeric; right justified rounded to full dollar amounts if blank, will assume to = 0 See ADVICE for data element # 2.	error if non-numeric error if >30,000
8. Father's Income Earned from Work COLUMN 42-47	999999 (reported for dependent aid applicants only)	numeric; right justified rounded to full dollar amounts if blank, will assume to = 0 See ADVICE for data element # 2.	error if non-numeric error if >222,222
9. Mother's Income Earned from Work COLUMN 48-53	999999 (reported for dependent aid applicants only)	numeric; right justified rounded to full dollar amounts if blank, will assume to = 0 See ADVICE for data element # 2.	error if non-numeric error if >222,222
10. Parents' Social Security Benefits COLUMN 54-58	99999 (reported for dependent aid applicants only)	numeric; right justified rounded to full dollar amounts if blank, will assume to = 0 See ADVICE for data element # 2.	error if non-numeric error if >30,000
11. Parents' AFDC, ADC Received COLUMN 59-63	99999 (reported for dependent aid applicants only)	numeric; right justified rounded to full dollar amounts if blank, will assume to = 0 See ADVICE for data element # 2.	error if non-numeric error if >30,000
12. Child Support Received by Parents for All Children COLUMN 64-68	99999 (reported for dependent aid applicants only)	numeric; right justified rounded to full dollar amounts if blank, will assume to = 0 See ADVICE for data element # 2.	error if non-numeric error if >30,000
13. Parents' Other Untaxed Income and Benefits COLUMN 69-73	99999 (reported for dependent aid applicants only)	numeric; right justified rounded to full dollar amounts if blank, will assume to = 0 See ADVICE for data element # 2.	error if non-numeric error if >88,888

Data Element	Field Layout	Instructions	Error Listing Messages
14. Ethnic Origin COLUMN 74	1 = White, Non-Hispanic 2 = African-American, Black 3 = Hispanic or Latino 4 = Asian or Pacific Islander 5 = American Indian or Alaskan Native 6 = International 7 = Unknown or Not Reported (for students refusing to report their ethnic origin).	numeric; right justified in range of 1 through 7 response required	error if non-numeric error if out of range (1-7)
15. Classification COLUMN 75	1 = undergraduate (has not received a bachelor's degree) 2 = graduate (has received a bachelor's degree) 3 = professional (enrolled in law, medicine, dentistry, veterinary medicine, etc.) 4 = student with bachelor's or higher degree enrolled in undergraduate program 5 = first-time entering freshman Use the classification of the student at the beginning of the award period. Report the program of study the student is enrolled under at your institution.	numeric; right justified in range of 1 through 5 response required	error if non-numeric error if out of range (1-5)
16. Dependency Status COLUMN 76	1 = dependent by Title IV definition 2 = independent by Title IV definition 3 = unknown (not active)	numeric; right justified 1 through 3 response required	error if non-numeric error if out of range (1-2) error if = 3
17. Date of Birth COLUMN 77-84	MMDDYYYY Enter the month, day and the four digit year of the birth of the student	numeric; right justified; 8 digits month range 01 through 12 day range 01 through 31 year range1911 through 1988 response required	error if non-numeric error if mm is out of range of 1-12 error if dd is out of range of 1-31 error if out of range 1911-1988

Data Element	Field Layout	Instructions	Error Listing Messages
18. Residency COLUMN 85	1 = resident 2 = out-of-state or foreign (cannot be used for students receiving any state aid except TPEG) 3 = unknown (to be used ONLY by private schools and NOT for students receiving any state aid) 4 = National Merit Finalist (to be used ONLY by private schools with TEG students) 5 = Non-immigrant Residents (students who formerly would have qualified through section 2 of HB 1403) Use the resident status of the student at	numeric; right justified 1, 2 or 5 (at public institution) 1, 2, 3, 4 or 5 (at independent institution) response required	error if non-numeric error if public inst and not = 1 or 2 or 5 error if out of range (1-5) error if = 1 or 5 and data element # 19 > 254 NOTE: Both in-district and out-of-district residents should be coded by community colleges as residents (1)
19. Location Code of Permanent Home Address COLUMN 86-88	the beginning of the award period. 999 Use list provided, which gives 3-digit codes for all Texas counties and for other states and foreign countries as used in the Coordinating Board CBM 001 report (see attached list).	numeric; right justified; 1 through 799 response required	error if non-numeric error if = 0 or if >799 error if in range of 371-400
20. Street Address of Permanent Address COLUMN 89-118	XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	alphanumeric; left justified 30 characters, maximum upper or lower case acceptable NOT required	may be left blank
21. City of Permanent Address COLUMN 119-138	XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	alpha; left justified 20 characters, maximum upper or lower case acceptable NOT required	may be left blank
22. Zip Code of Permanent Home Address COLUMN 139-147	999999999 If last 4 digits are unknown, leave them blank.	numeric response required, if USA address; leave blank if not USA address	error if non-numeric error if zip prefix is 99999 (out of range) error if zip prefix is 00007 (out of range

Data Element	Field Layout	Instructions	Error Listing Messages
23. Enrollment Status COLUMN 148	1 = full-time 2 = 3/4-time 3 = ½ time	numeric; right justified 1 through 4 response required	error if non-numeric error if out of range (1-4)
	4 = less than ½ time Report the highest enrollment status of the student during the award period.		
24. Gender COLUMN 149	M = male F = female	alpha; left justified M or F response required	error if does not equal M or F
		upper or lower case acceptable	
25. Highest grade level mother completed	1 = elementary 2 = high school 3 = college or beyond	numeric; right justified 1 through 4 response required	error if non-numeric error if out of range (1-4)
COLUMN 150	4 = unknown Indicate the education level for their last complete year of school. For example, if it was their 1st year of college, indicate 3; if it was their senior year in high school, indicate 2.	if unknown, report 4	
26. Highest grade level father completed COLUMN 151	1 = elementary 2 = high school 3 = college or beyond 4 = unknown Indicate the education level for their last complete year of school. For example, if it was their 1st year of college, indicate 3; if it was their senior year in high school, indicate 2.	numeric; right justified 1 through 4 response required if unknown, report 4	error if non-numeric error if out of range (1-4)

Data Element	Field Layout	Instructions	Error Listing Messages
27. Cost of Attendance COLUMN 152-156	99999 This should be the gross cost figure. If the student received an exemption or waiver of tuition and/or fees, such adjustments should be reported for data element # 29.	numeric; right justified rounded to full dollar amounts response required If not accurate for the period the student was enrolled, you MUST provide enrollment adjustment percentage (EAP) for data element # 69 of this report.	error if non-numeric error if out of range (50-50,000) error if <50 AND (data elements 29-37 > 0 AND data elements 40-68 > 0)
28. Total Family Contribution COLUMN 157-162	999999 as determined using federal methodology (May reflect professional judgment calculation)	numeric; right justified rounded to full dollar amounts response required If not accurate for the period the student was enrolled, you MUST provide enrollment adjustment percentage (EAP) for data element # 070 of this report	error if non-numeric error if > 999,999
29. Tuition Exemptions or Waivers or Fellowships COLUMN 163-167	99999 This should equal the amount of tuition and/or fees the student did NOT pay as a result of receiving an exemption or waiver. Awards through the Educational Aides Exemption Program should be reported here.	numeric; right justified rounded to full dollar amounts if blank, will assume = 0	error if non-numeric error if >88,888
30. Categorical Aid COLUMN 168-172	99999 Any aid brought to the institution by the student and not packaged by the Financial Aid Office. This would include such things as JTPA, Texas Rehabilitation Commission and Texas Employment Commission payments, Texas Tomorrow Plan and outside scholarships.	numeric; right justified rounded to full dollar amounts if blank, will assume = 0	error if non-numeric error if >88,888

Data Element	Field Layout	Instructions	Error Listing Messages
31. Grants and Scholarships		numeric; right justified rounded to full dollar amounts if blank, will assume = 0	error if non-numeric
a) Federal Pell COLUMN 173-177	a) 99999	a) Pell range 0 through 6,000	error if >6000 (out of range)
b) Federal SEOG (including match) COLUMN 178-182	b) 99999	b) SEOG range 0 through 4000	error if >4000 (out of range) error if > (COA-EFC) & EAP > 0 error if > COA-EFC
c) TPEG (On-Campus) COLUMN 183-187	c) 99999 PUBLIC INSTITUTIONS ONLY	c) TPEG range 0 through (COA-EFC)	error if not public inst and >0 error if >88,888 (out of range) error if > (COA-EFC) & EAP > 0 error if > COA-EFC
d) Smart Grant PSIG (report PSIG only here,	d) 99999 PUBLIC AND PRIVATE UNIVERSITIES	d) SMART GRANT	Error if > 0
LEAP should be reported in data element # 31f)	ONLY	INACTIVE FOR 2006	INACTIVE FOR 2006
COLUMN 188-192			
e) TEG (private schools only) COLUMN 193-197	e) 99999 PRIVATE INSTITUTIONS ONLY	e) TEG range 0 through 3,444	error if not private inst and > 0 error if >3444 (out of range) error if > (COA-EFC) & EAP > 0 error if > COA-EFC error if enrollment status (data element 23) = 4 error if residency status (data element 18) = 2 or 3

Data Element	Field Layout	Instructions	Error Listing Messages
f) LEAP (public and private schools) COLUMN 198-202	f) 99999 PUBLIC AND PRIVATE INSTITUTIONS PUBLIC INSTITUTIONS: REPORT LEAP FUNDS SEPARATELY FROM	f) LEAP range 0 through 5,000	error if > 5000 (out of range) error if > (COA-EFC) & EAP > 0 error if > COA-EFC error if enrollment status (data element 23) =
COLUMN 190-202	PSIG FUNDS		error if public inst and residency status (data element 23) = 4 error if public inst and residency status (data element 18) = 2 or 3 or 4 or 5 error if private inst and residency status (data element 18) = 2 or 3 or 5
g) HB3015 Grants/Scholarships	g) 99999 This includes grants and scholarships funded through designated tuition set-	g) HB3015 Gr/Sch range 0 through 99,999	Error if > 99999 (out of range) error if > (COA-EFC) & EAP > 0 error if > COA-EFC
COLUMN 203-207	asides		error if not public university or health-related inst error if residency status (data element 18) = 2 or 3 or 4
h) Merit-based aid funded by private donations to the institution	h) 99999 This includes gift aid provided to the institution by private donors and used to	h) Merit-to-Inst range 0 through 99,999	error if > 0
COLUMN 208-212	award merit-based grants or scholarships	INACTIVE FOR 2006	INACTIVE FOR 2006
i) Institution funded Merit- based Gift Aid	i) 99999 This includes gift aid generated from local funds and used to make merit-	i) Merit-from-Inst range 0 through 99,999	error if > 0
COLUMN 213-217	based awards	INACTIVE FOR 2006	INACTIVE FOR 2006
j) Byrd Scholarship	j) 99999	j) Byrd range 0 through 1,500	error if >1500 (out of range) error if classification (data element 15) = 2 or
COLUMN 218-222			3 or 4

Data Element	Field Layout	Instructions	Error Listing Messages
k) State Nursing Scholarship COLUMN 223-227	k) 99999 Includes vocational and professional nursing scholarships funded by the state	k) State nurse scholarship range 0 through 3,000	error if >3,000 (out of range) error if > (COA-EFC) & EAP > 0 error if > COA-EFC error if enrollment status (data element 23) = 4 error if residency status (data element 18) = 2 or 3 or 4
I) Student Deposit Scholarship COLUMN 228-232	I) 99999 PUBLIC INSTITUTIONS ONLY	Deposit scholarship range 0 through (COA-EFC)	error if not public inst and >0 error if >88,888 (out of range) error if > (COA-EFC) & EAP > 0 error if > COA-EFC error if residency status (data element 18) = 2 or 3 or 4
m) Academic Competitive Grant FILLER COLUMN 233-237	m) 99999	m) Academic Competitive Grant INACTIVE FOR 2006	error if > 0 INACTIVE FOR 2006
n) Other Scholarships or Grants COLUMN 238-242	n) 99999 This would include any need-based award, such as the 5 th –year accounting scholarship, which would be considered in determining the student's eligibility for Title IV need-based aid (including fellowships).	n) Other need-based scholarships or grants Maximum unknown	error if >88,888 (out of range) error if > (COA-EFC) & EAP >0 error if > COA-EFC
o) TEXAS Grant Program COLUMN 243-247	o) 99999 SSNs and award amounts must match to TEXAS Grant Year-End Student-by- Student Report	o) TEXAS Grant range 0 through 3,590	error if >0 and not participating inst error if >0 and classification (data element 15) =2 or 3 or 4 error if >3590 (out of range) error if > (COA-EFC) & EAP > 0 error if > COA-EFC error if enrollment status (data element 23) = 3 or 4 error if residency status (data element 18) = 2 or 3 or 4

Data Element	Field Layout	Instructions	Error Listing Messages
p) TEOG (formerly TEXAS Grant II) COLUMN 248-252	p) 99999 PUBLIC STATE COLLEGES, PUBLIC COMMUNITY COLLEGES AND TSTC ONLY SSNs and award amounts must match to Year-End Student-by-Student Report	p) TEOG range 0 through 3,590	error if >0 and not participating inst error if >0 and classification (data element 15) = 2 or 3 or 4 error if >3590 (out of range) error if > (COA-EFC) & EAP > 0 error if > COA-EFC error if enrollment status (data element 23) = 4 error if residency status (data element 18) = 2 or 3 or 4
q) SLEAP COLUMN 253-257	q) 99999	q) SLEAP range 0 through 5,000	error if >5000 (out of range) error if > (COA-EFC) & EAP > 0 error if > COA-EFC error if enrollment status (data element 23) = 4 error if public inst AND residency status (data element 18) = 2 or 3 or 4 or 5 error if private inst AND residency status (data element 18) = 2 or 3 or 5

Data Element	Field Layout	Instructions	Error Listing Messages
32. Work-Study		numeric; right justified rounded to full dollar amounts if blank, will assume = 0	error if non-numeric
a) Federal Work-Study (federal funds plus match)	a) 99999	a) Federal work-study range 0 through (COA-EFC) + 300	error if > (COA-EFC + 300) & EAP >0 error if > (COA-EFC)+300 error if > 88,888 (out of range)
COLUMN 258-262			
b) Texas Work-Study (state funds plus match) COLUMN 263-267	b) 99999	b) Texas work-study range 0 through (COA-EFC)	error if >88,888 (out of range) error if >(COA-EFC) & EAP > 0 error if > COA-EFC error if enrollment status (data element 23) = 4
			error if residency status (data element 18) = 2 or 3 or 4 or 5
c) Need-based Institutional Work-Study	c) 99999	c) Institutional work-study range unknown	error if >88,888 (out of range) error if >(COA-EFC) & EAP > 0 error if > COA-EFC
COLUMN 268-272			SHOT II S GOTT ET G
d) AMERICORPS	d) 99999	d) Americorps range 0 through (COA-EFC)	error if >88,888 (out of range) error if >(COA-EFC) & EAP > 0
COLUMN 273-277		rango o anough (o o/, iii o/	error if > COA-EFC
e) HB3015 Work-study	e) 99999 This includes work-study funded through	e) HB3015 WS range 0 through 99,999	error if > 99,999 (out of range) error if >(COA-EFC) & EAP > 0
COLUMN 278-282	designated tuition set-asides		error if > COA-EFC error if residency status (data element 18) = 2 or 3 or 4 error if not public university or health-related inst
f) Texas Work-Study Mentorship Program FILLER	f) 99999	f) Texas Work-Study Mentorship Program	error if > 0
COLUMN 283-287		INACTIVE FOR 2006	INACTIVE FOR 2006

Data Element	Field Layout	Instructions	Error Listing Messages
33. Loans	Report gross amount borrowed for all loans:	numeric; right justified rounded to full dollar amounts if blank, will assume = 0	error if non-numeric
a) Subsidized Stafford Loans COLUMN 288-292	a) 99999	a) Sub. Stafford range 0 through 8,500	error if > 8500 (out of range)
b) Unsubsidized Stafford Loans	b) 99999	b) Unsub. Stafford range 0 through 18,500	error if > 18500 (out of range)
COLUMN 293-297			
c) Perkins Loans	c) 99999	c) Perkins range 0 through 12,000	error if >12000 (out of range)
COLUMN 298-302		range of through 12,000	
d) Federal SLS+PLUS Loans	d) 99999	d) SLS+PLUS range 0 through COA	error if exceeds cost of attendance error if > 88,888 (out of range)
COLUMN 303-307			
e) HELP Loans	e) 99999	e) HELP range 0 through 20,000	error if >20000 (out of range) error if enrollment status (data element 23) =
COLUMN 308-312		-ago	error if residency status (data element 18) = 2 or 3 or 4 or 5
f) College Access Loan (CAL) COLUMN 313-317	f) 99999	f) CAL range 0 through COA	error if exceeds cost of attendance error if residency status (data element 18) = 3 error if enrollment status (data element 23) = 4

Data Element	Field Layout	Instructions	Error Listing Messages
g) Primary Care Student Loans	g) 99999	g) Primary care loans range unknown	error if non-numeric
COLUMN 318-322			
h) Income Contingent Loans	h) 99999	h) Income contingent loans range unknown	error if >88,888 (out of range)
COLUMN 323-327		range unknown	
i) Subsidized Federal Direct	i) 99999	i) Sub. direct loans range 0 through 8,500	error if >8,500 (out of range)
COLUMN 328-332		rango o anough o,ooo	
j) Other long-term loans	j) 99999	j) Other loans range unknown	error if >88,888 (out of range)
COLUMN 333-337		range unknown	
k) Unsubsidized Federal Direct Loans	k) 99999	k) Unsub. direct loans range 0 through 18,500	error if >18500 (out of range)
COLUMN 338-342			
I) BOT (Be On Time) Loan Program	1) 99999	I) BOT Loan Program range 0 through 8,360	error if >8360 (out of range) error if enrollment status (data element 23) = 2 or 3 or 4
COLUMN 343-347			error if residency status (data element 18) = 2 or 3 or 4 or 5 error if classification (data element 15) = 2 or
			3 or 4
m) HB3015 Loans	m) 99999	m) HB3015 Loans	error if > 99999 (out of range)
COLUMN 348-352	This includes loans funded through designated tuition set-asides	range 0 through 99999	error if >(COA-EFC) & EAP > 0 error if > COA-EFC error if residency status (data element 18) = 2 or 3 or 4 error if not public university or health-related inst

Data Element	Field Layout	Instructions	Error Listing Messages
34. Other Programs		numeric; right justified rounded to full dollar amounts if blank, will assume = 0	error if non-numeric
a) Filler Teach for Texas Alternative Certification Conditional Grant Program COLUMN 353-357	a) 99999 For adding new programs	a) LEAVE BLANK	error if > 0
b) HB3015 Other COLUMN 358-362	b) 99999 This includes other funds funded through designated tuition set-asides	b) HB3015 Other range 0 through 99,999	error if >99999 error if >(COA-EFC) & EAP > 0 error if > COA-EFC error if residency status (data element 18) = 2 or 3 or 4 error if not public university or health-related inst

Data Element	Field Layout	Instructions	Error Listing Messages
35. Enrollment adjustment percentage (EAP)	If the student's cost of attendance (data element 27) or Total Family Contribution (data element 28) figures do not correspond to the time-period in which the reported financial aid was received, indicate the percent by which the COA or TFC or both should be multiplied to derive the appropriate figure. If only COA should be adjusted, leave the EAP for TFC at 000 and vice versa. Example: A student's recorded total family contribution figure is for 9 months but the student only attended one quarter. The EAP for cost (field 069) should be 033, indicating that in determining unmet need for this student, only 33 percent of the reported family contribution figure should be compared to the reported financial aid resources. You would leave field 070 as 000.	numeric; right justified rounded to full percentage points, no decimal points. Enter in 000 if cost and family contribution figures are correct for the period the student was enrolled.	error if non-numeric
a) Enrollment adjustment percentage (EAP) for Cost of Attendance COLUMN 363-365	999	numeric; right justified do not leave blank, enter in 000	error if non-numeric
b) Enrollment adjustment percentage (EAP) for Total Family Contribution COLUMN 366-368	999	numeric; right justified do not leave blank, enter in 000	error if non-numeric

DATABASE STRUCTURE

(FIXED LENGTH TEXT)

<u>Data</u>	FIELD_NAME	FIELD_TYPE	<u>FIELD</u>	<u>FIELD</u>	COLUMN F	POSITION
Element #			<u>LENGTH</u>	INDEXED?	<u>Beginning</u>	Ending
<u>#</u> 1	SOC_SEC_NUMBER	CHARACTER	9	Υ	1	9
2	STDNT_WORK_INCOME	NUMERIC	6	Ν	10	15
3	SPOUSE_WK_INCOME	NUMERIC	6	N	16	21
4	SOC_SEC_BENEFITS	NUMERIC	5	Ν	22	26
5	AFDC_ADC	NUMERIC	5	N	27	31
6	CHILD_SUPPORT	NUMERIC	5	N	32	36
7	OTHER_INCOME_BENE	NUMERIC	5	N	37	41
8	FATHERS_WK_INCOME	NUMERIC	6	N	42	47
9	MOTHERS_WK_INCOME	NUMERIC	6	N	48	53
10	PAR_SOC_SEC_BENE	NUMERIC	5	N	54	58
11	PARENTS_AFDC_ADC	NUMERIC	5	N	59	63
12	PARENT_CHILD_SUPP	NUMERIC	5	N	64	68
13	PAR_INCOME_BENEF	NUMERIC	5	N	69	73
14	ETHNIC_ORIGIN	CHARACTER	1	N	74	74
15	CLASSIFICATION	CHARACTER	1	N	75	75
16	DEPENDENCY_STATUS	CHARACTER	1	N	76	76
17	DATE_OF_BIRTH	CHARACTER	8	N	77	84
18	RESIDENCY	CHARACTER	1	N	85	85
19	LOCATION_CODE	CHARACTER	3	N	86	88
20	STREET_ADDRESS	CHARACTER	30	N	89	118
21	CITY_ADDRESS	CHARACTER	20	N	119	138
22	ZIP_ADDRESS	CHARACTER	9	N	139	147
23	ENROLLMENT_STATUS	CHARACTER	1	N	148	148
24	GENDER	CHARACTER	1	N	149	149
25	MOTHER_HIGH_GRADE	CHARACTER	1	N	150	150
26	FATHER_HIGH_GRADE	CHARACTER	1	N	151	151
27	COST_OF_ATTEND	NUMERIC	5	N	152	156
28	TOTAL_FAMILY_CONT	NUMERIC	6	N	157	162
29	TUIT_EXEMPT_WAIV	NUMERIC	5	N	163	167
30	CATEGORICAL_AID	NUMERIC	5	N	168	172
31a	FEDERAL_PELL	NUMERIC	5	N	173	177
31b	FEDERAL_SEOG	NUMERIC	5	N	178	182
31c	TPEG_ON_CAMPUS	NUMERIC	5	N	183	187
31d	SMART_GRANT	NUMERIC	5	N	188	192
31e	TEG_PRIVATE_SCHL	NUMERIC	5	N	193	197
31f	LEAP	NUMERIC	5	N	198	202
31g	HB3015_GRANTS	NUMERIC	5	N	203	207
31h	MERIT_TO_INST	NUMERIC	5	N	208	212
31i	MERIT_BY_INST	NUMERIC	5	N	213	217
31j	BYRD_SCHOLARSHIP	NUMERIC	5	N	218	222
31k	STATE_NURSE_SCHLR	NUMERIC	5	N	223	227
311	STUDENT_DEP_SCHLR	NUMERIC	5	N	228	232

<u>Data</u>	FIELD NAME	FIELD TYPE	<u>FIELD</u>	<u>FIELD</u>	COLUMN F	OSITION
Element #			<u>LENGTH</u>	INDEXED?	<u>Beginning</u>	<u>Ending</u>
<u>#</u> 31m	ACAD_COMPET_GRANT	NUMERIC	5	N	233	237
31n	OTHER_SCHLR_GRANT	NUMERIC	5	N	238	242
310	TEXAS_GRANT_PGM	NUMERIC	5	N	243	247
31p	TEOG	NUMERIC	5	N	248	252
31q	FEDERAL_SLEAP	NUMERIC	5	N	253	257
32a	FEDERAL_WK_STUDY	NUMERIC	5	N	258	262
32b	TEXAS_WORK_STUDY	NUMERIC	5	N	263	267
32c	NEED_BASED_INST	NUMERIC	5	N	268	272
32d	AMERICORPS	NUMERIC	5	N	273	277
32e	HB3015_WS	NUMERIC	5	N	278	282
32f	TXWS_MENTORSHIP	NUMERIC	5	N	283	287
33a	SUBS_STAFFORD_LN	NUMERIC	5	N	288	292
33b	UNSUB_STAFFORD_LN	NUMERIC	5	N	293	297
33c	PERKINS_LOAN	NUMERIC	5	N	298	302
33d	FEDERAL_PLUS_LNS	NUMERIC	5	N	303	307
33e	HELP	NUMERIC	5	N	308	312
33f	COLLEGE_ACCESS_LN	NUMERIC	5	N	313	317
33g	PRIM_CARE_STD_LN	NUMERIC	5	N	318	322
33h	INCOME_CONTIG_LNS	NUMERIC	5	N	323	327
33i	SUB_FED_DIR_LNS	NUMERIC	5	N	328	332
33j	OTHER_LT_LOANS	NUMERIC	5	N	333	337
33k	UNSUB_FED_DIR_LNS	NUMERIC	5	N	338	342
331	ВОТ	NUMERIC	5	N	343	347
33m	HB3015_LOANS	NUMERIC	5	N	348	352
34a	FILLER	NUMERIC	5	N	353	357
34b	HB3015_OTHER	NUMERIC	5	N	358	362
35a	ENROLL_ADJ_COA	NUMERIC	3	N	363	365
35b	ENROLL_ADJ_TFC	NUMERIC	3	N	366	368

REVISIONS TO DATABASE REPORT FOR REPORTING FY 2006

- It was previously indicated that you will need to report merit, non-need based aid recipients along with your need-based aid recipients in fall 2006. This still has not been activated. You still must ONLY report students who received any type of need-based aid or any type of aid which required a need analysis, just as in 2005 reporting.
- It was previously indicated that you would need to add three fields to the beginning of each of your student records, identical to the CBM001 report. Our system inserted those fields for you last year and it will insert them this year as well. The codes as indicated previously are:
 - A Report Code an F;
 - B FICE your 6-digit fice code;
 - C Fiscal Year the 4 digit fiscal year that is being reported (ie 2006).
- Data Element 16 (Dependency Status) added option 3 for unknown. This should NOT be used for 2006 reporting. If this option is to be used in the future, institutions will be notified;
- Data Element 31d (SMART Grant) previously PSIG. This should NOT be used for 2006 reporting;
- Data Element 31e (TEG) maximum changed to \$3,444;
- Data Element 31f (LEAP) maximum changed to \$5,000;
- Data Element 31h (Merit-based aid funded by private donations to the institution) This should NOT be used for 2006 reporting as previously indicated;
- Data Element 31i (Institution funded Merit-based Gift Aid) This should NOT be used for 2006 reporting as previously indicated;
- Data Element 31m (Academic Competitive Grant) − previously a Filler. This should NOT be used for 2006 reporting;
- Data Element 31q (SLEAP) maximum changed to \$5,000;
- ◆ Data Element 32f (Texas Work-Study Mentorship) previously a Filler. This should NOT be used for 2006 reporting;
- Data Element 33a (Subsidized Stafford Loans) maximum changed to \$8,500;
- Data Element 33b (Unsubsidized Stafford Loans) maximum changed to \$18,500;
- Data Element 33e (HELP) maximum changed to \$20,000;
- Data Element 33f (College Access Loan) maximum changed to cost of attendance;
- Data Element 33i (Subsidized Federal Direct Loans) maximum changed to \$8,500;
- Data Element 33k (Unsubsidized Federal Direct Loans) maximum changed to \$18,500;
- Data Element 33I (BOT) maximum changed to \$8,360;
- Data Element 34a (FILLER) previously used for Teach for Texas Alt. Cert. Cond. Grant;

Graduate PLUS Loans will be collected for 2007 reporting, however, the field location has not yet been determined.

FREQUENTLY ASKED QUESTIONS AND ANSWERS

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Frequently Asked Questions

Question 1. Which students should be included?

For fall 2005. All students who receive any type of need-based aid, or any type of aid which requires a need analysis (including unsubsidized loans) should be included -- residents and nonresidents; undergraduates and graduates; continuing education or regular students. If the student is receiving only an academic scholarship, which does not require a need analysis or is receiving a tuition waiver or exemption, which does not require a need analysis, he or she should not be included.

For fall 2006. It was previously indicated that you will need to report any and all merit- and need-based aid recipients in fall 2006. This still has not been activated; report students who received any type of need-based aid, or any type of aid which required a need analysis just as in 2005 reporting. **For fall 2006.** All merit- and need-based aid recipients will need to be reported in fall 2006.

Question 2. Must all students receiving some type of tuition exemption, waiver or categorical aid be included in the database?

For fall 2005. Exemptions, waivers and categorical aid are generally not need-based awards. Such students would only be reported if they were ALSO receiving some type of need-based aid. **For fall 2006.** Report just as you did in 2005, no change.

For fall 2006. Yes. All exemptions and waivers should be reported, which also means that they should NOT be treated as adjustments to Cost, but rather as awards from the school. The Cost of Attendance figures should be full cost, not cost adjusted for the exemption or waiver.

Question 3. Should students receiving Texas National Guard Tuition Assistance Program be included in the database?

For fall 2005. The Texas National Guard Tuition Exemption program is not a need based exemption. So, if the student is receiving ONLY that exemption, then he/she would not be included in the database. If the student is receiving that exemption as well as a need based grant/scholarship, then you would report the exemption portion of their award under Data element 029, Tuition Exemptions or Waivers or Fellowships.

For fall 2006. Report just as you did in 2005, no change.

For fall 2006. You will need to report them.

Question 4. What definition of academic year will need to be used for the report?

We will accept the school's definition of an academic year. However, it is imperative that the institution be consistent in reporting from year to year. Our statistics will be valid as long as they reflect a 12-month period, whenever that period begins or ends.

Question 5. If I report a TEG award to a nonresident, will my records be rejected?

Yes, you must report the student as either a resident or a National Merit Finalist (added as #4 under Residency Data element 018).

Question 6. We have many people (especially international students) who have no social security numbers. Could we just use nine zeros for the student identification numbers for all of them?

NO. Please use unique numbers for each individual. Since this database is often matched with other CB databases, you must use the SAME number you have used to report the student in either the CBM or TEXAS Grant Student-by-Student reports.

Question 7. What is the EASIEST way to have a student's record accurately reflect total income?

The easiest way is to enter the TOTAL INCOME you use for the student on the FISAP report as a response to Data element 2, and leave Data elements 3-13 blank.

Question 8. We are a community college, but we have students enrolled who have Bachelors, Masters or PhD's. How should they be classified?

They should be classified based on the course work they are taking at your institution.

☼Question 9. Can we use the FAFSA as our source of residency information?

No. Public institutions should use the classification assigned by your registrar or admissions officer. If you are using an electronic system, make sure you can tell the difference between nonresidents getting to pay the resident rate because of waivers and regular residents. If you are a private institution you must also follow state residency laws and rules. The Coordinating Board can provide you a residency questionnaire for this purpose.

Question 10. Should students receiving only Educational Aides Exemptions be included in the data file? (If need is calculated based on the income method rather than the federal methodology, schools do not have all the demographic information included in a student record.)

For fall 2005. If the only award the student received is an Educational Aide Exemption and they filed the FAFSA to determine eligibility, you need to include the student in the data file. You will receive an error for leaving all the other Financial Aid Fields (Data Elements 31a-34b) blank, but you will need to submit an e-mail with an explanation and your report will be accepted. If the only award the student received is an Educational Aid Exemption and they used their income tax form to determine eligibility, you would NOT include the student in the data file.

If the student received at least one other type of need-based aid, the student should be included in the file and the EA award should be shown in the exemptions and waivers field.

For fall 2006. Report just as you did in 2005, no change.

For fall 2006. You will need to report all students receiving EA awards.

Question 11. Are students receiving only PLUS loans to be reported? They no longer are required to have need analysis.

Since PLUS no longer meets these criteria, you DO NOT have to report students who ONLY receive PLUS loans in fall 2005. In fall 2006, report just as you did in 2005, no change. In fall 2006 you will need to report them in data element 33d.

Question 12. Where should money that the institution uses to cover the shortfall between the state TEXAS Grant amount and Actual Tuition and Fees be reported?

This should be reported in the field relevant to the funds (Pell for Pell, TPEG for TPEG. If institutional aid is used, report data element 31n (Other Grants or Scholarships).

Question 13. Where should The Houston Livestock and Rodeo Scholarship be reported? It should be reported under data element 030 (Categorical Aid).

Question 14. How should summer costs/resources be handled?

They should be added in with regular semester costs/resources on an individual student basis. Be sure each student is reported only once for the academic year, but include all of the student's relevant costs and resources. DO NOT report nine-month and summer data separately for a single student. Although such an approach would not necessarily distort aggregate cost or resource

figures, the total number of students would be wrong, and all calculated average costs, resources, etc., would be significantly distorted.

Question 15. Is this strictly a 9-month report, or should summer be included?

This is an ACADEMIC YEAR report, and summer should be included. Make sure each student is reported only once, but that his/her cost and resource figures reflect his/her full period of enrollment during the relevant academic year.

Question 16. If my values fall outside the ranges indicated on the Coordinating Board's Data Elements and Edit Checks form, will my records be rejected?

Yes. The ranges used for our fields were based on program maximums, as best as we could determine them. If you have a student whose value legitimately falls outside our range, you will need to send us confirmation in writing that his/her value is correct. With such documentation, we can override the edits in our system. Contact us if you feel a range is incorrect.

Question 17. How should we report financial aid which is not handled by the financial aid office? Use the same approach you currently use in making sure there are no over awards. If you package the aid or the student informs you of other resources, report them. These funds would probably be reported as "categorical aid" (data element 030) or "other scholarships or grants" (data element 31n).

Question 18. What information should be entered in the filler fields and how long should the filler fields be?

Nothing should be entered, unless you are advised by our office that a filler field has been activated. The filler fields are reserved for future programs. All data elements 27 through 34b are five digits long except data element 28, which is 6 digits.

Question 19. If the student marks "no" to the question on the free aid application regarding the release of information to the state, can the schools report the data?

Yes. You are submitting data to us for reporting purposes, not to determine whether the student is eligible for a state financial aid award.

Question 20. Do hyphens (-) or slashes (/) appear in the 9-digit student ID code?

No. All digits should be numeric. No punctuation should be added.

Question 21. For some institutions the reporting of income components will be more of a burden than reporting a summarized "Total Income" figure. Can the report be changed back to its earlier format?

Make it easy on yourself. The goal of the income questions on the Financial Aid Database is to allow us, by adding the figures in data elements 2 through 13, to derive a Total Income figure. If your current reporting system holds all the components, report all of them and we'll derive the total; if your current reporting system aggregates all of them, record your Total Income figure in data element 2 and leave the rest of the income fields blank. If your current system aggregates some of them, report the totals as best you can, using our format. The only way we will use your income figures will be in aggregate form. The specific numbers in data elements 2 through 13 will not matter.

Question 22. What do we do if the student refuses to give his/her ethnic origin?

In data element 14 (Ethnic Origin) we have modified the instructions to indicate that option 6 (other) may be used for foreign students OR for students refusing to report their ethnic origin.

Question 23. What ethnic origin should we report for international students?

Use option 6 to report international students. This option has been added to the report, but should be used for international students only. Use option 7 for students refusing to give their ethnic origins.

Question 24. I am uncomfortable reporting students with bachelor's degrees who are enrolled in undergraduate programs as graduates.

The range of allowed responses to data element 15 includes an option 4 for individuals who have at least bachelor's degree, but are enrolled in an undergraduate program of study.

Question 25. When is the report to be "as of"? That is, do we take classification from spring semester or fall?

Report fall classification for the year being reported. That is, for the 2003-04 academic year, you will need to report fall, 2003 classifications.

Question 26. How should persons stationed in Texas by the military be classified with respect to residency?

If their state of record with the military is not Texas, they must be reported as nonresidents, even if they are receiving waivers and are allowed to register by paying the resident rate. They are nonresidents. If their state of record with the military is Texas, they are Texas residents. *Make sure you can tell from your admissions/registrar's records whether an individual is a resident or simply a nonresident who gets to pay the resident rate.*

Question 27. Is a location code required for non-Texans?

Yes. A 3-digit location code is needed for all students in the database. If your reporting system does not include a Location code, you will need to add one for this report. State and country codes are available in the appendix to this manual. (See page 82.)

Question 28. Will individual addresses be shared with anyone, for instance, with the Legislature? No. No individual data will be given out under any circumstances. Only aggregate data reports will be generated from the statewide financial aid database.

Question 29. If the student has no permanent address on file, can we use the local address or a PO Box number?

As of Fall 2005, street addresses and city are no longer required.

Question 30. For data element 23, Enrollment Status, how are the terms defined?

Make sure your report is reflecting the following:

In general, for undergraduates:

full-time = at least 12 hours per semester

3/4 time = 9-11 hours per semester

½ time = 6-8 hours per semester

less than ½ time = fewer than 6 hours per semester

For graduates:

full-time = at least 9 hours per semester

³/₄ time = 7-8 hours per semester

 $\frac{1}{2}$ time = 4.5-6 hours per semester

less than ½ time = fewer than 4.5 hours per semester

Question 31. If the student's enrollment status is different from semester to semester, which term's enrollment status should we report?

Report the highest enrollment status of the student during the reported academic year.

Question 32. I do not collect the highest grade levels for my aid applicants' parents. Do I have to report it?

The current Free Application for Federal Student Aid now collects this information (questions 23-24). This is one of the few questions on the survey with a response option of **"unknown"**. If you do not have the information available you should answer **"unknown"** and the answer will not be

challenged by our office. Please do what you can, however, to gain access to this information.

Question 33. Are the parents' highest grade level statistics needed for independent students or only for dependent students?

Both dependent and independent students, if available from the FAFSA. The Legislature has been known to propose grant programs targeted to "first-generation college students". This is our one source of this information.

Question 34. My reporting system is based on 9-month cost and family contribution figures. If a student fails to return in the spring, the system automatically adjusts the awards going to the student, but cost and family contribution figures are not revised in my system. What should I do?

You cannot just report the data as shown on your system, since they will indicate a significantly inflated unmet need for the student. The best way to handle it from OUR perspective is for you to go in and adjust your cost and family contributions to appropriately correspond to the time in which the student was enrolled and receiving aid. If your system does not allow you to do this with any ease, you will need to report an "Enrollment Adjustment Percentage" for Cost of Attendance and/or Family Contribution as indicated in data element 35a and 35b of the report. This is the percentage by which your cost and/or family contribution figures should be multiplied to derive accurate figures for the period of enrollment. The percentage is expressed in whole numbers (no decimal points). If the cost and/or family contribution figures do not need adjustment and are accurate for the student's period of enrollment, enter zeroes for data element 35a and 35b. If the cost only needs to be adjusted, but not the family contribution, enter the percentage in data element 35a and put zeroes in data element 35b and vice versa.

Question 35. If a student makes a refund, must the report reflect the NET award, or can the original award amount be used?

This is a year-end report. The student's NET award should be reported.

Question 36. If a student drops some hours, but continues to be enrolled, must we adjust the student's cost of attendance accordingly?

Only if the dropped hours has an impact on the student's financial aid package.

Question 37. Do we report all aid offered to the student, or only the aid accepted and actually used by the student?

Report only the aid accepted and actually used by the student.

Question 38. The cost figures we have in our system have already netted out any tuition exemption or waiver received by the student. Do we have to add exemptions or waivers back in to our cost figures to derive data element 27, just so we can then report them and have them taken back out at data element 29?

We would prefer to work with FULL cost figures and FULL resource figures. If, however, doing so would create significant problems for you, just make sure nothing is double counted. That is, if your cost figure is a net figure, be sure you do NOT report an exemption or waiver amount in data element 29. In fall 2006 you will need to report full cost and report exemptions/waivers as resources.

Question 39. Are tuition AND fee exemptions to be reported or only tuition exemptions? Both tuition and fee exemptions should be included either as an adjustment to the cost of attendance or as a separately reported item in data element 29.

Question 40. Should graduate fellowships be reported in Tuition exemptions, waivers or fellowships or Categorical aid?

They should be reported with tuition exemptions, waivers or fellowships, data element 29.

Question 41. Should any of the awards listed for data elements 31a-31q (Grants and Scholarships) be included in data element 30 (Categorical Aid)?

No. Categorical aid is aid the student brings to the school (such as a PTA scholarship); the institutional aid office did not package such aid for the student (the school did not get to select the recipient.). Grants and Scholarships listed in data elements 31a-31q are awarded through the institution and should NOT be included in data element 30.

- Question 42. Should JTPA be considered categorical aid and be reported in data element 30? Yes.
- Question 43. Where should VA benefits be reported?

 Under categorical aid (data element 30).
- Question 44. Must foreign students receiving only campus-based TPEG be reported?

Yes. TPEG must be awarded on the basis of financial need. The student's cost of attendance and resources will need to be reported, as used in determining his/her eligibility for the funds.

- Question 45. For work-study, what should be reported, amount awarded or amount earned?

 Amount earned.
- Question 46. Should only state funds be reported or should matching funds be included? You need to include state and matching funds.

THE REPORTING CYCLE

Sequence of Activities Sequence of Activities Flowchart

Sequence of Activities

- **A**. Our first step is done in April. We ask each Financial Aid Officer to confirm the "generic" e-mail address that begins with fadmail@institution or fad-mail@institution. We then update our file.
- **B**. The institutions then submit their files to our office. They are sent electronically and the institution receives almost immediate confirmation that we have received the file. This does not mean that the file is correct; it simply means that the institutions' transmissions were received.
- **C**. Our computer edits are performed and an error listing is automatically generated. The notification to retrieve your error listing is sent to the generic e-mail address for each institution. The processing times are:

Report in by	Edit report ready (approx)
6:00 a.m	7:00 a.m
8:00 a.m	9:00 a.m
10:00 a.m	11:00 a.m
1:00 p.m	2:00 p.m
3:00 p.m	4:00 p.m
6:00 p.m	7:00 p.m

D. The school then makes corrections as indicated on the error listing and resubmits its file. We monitor the time delays in receiving responses from institutions. If more than 2 days pass between the sending of our error listings and the receipt of a response from the school, we will contact the institution through the generic email address. All edits need to be resolved by October 15 and your certification must be returned by November 1.

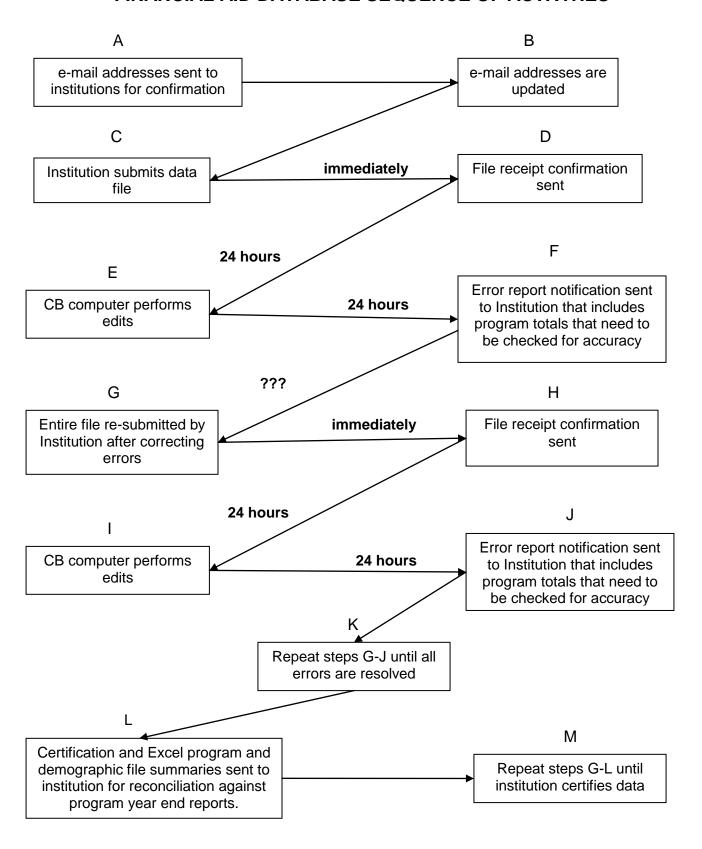
THE CYCLE IS REPEATED UNTIL ALL ERRORS HAVE BEEN RESOLVED.

- **E**. The steps mentioned above should eliminate the possibility of schools being unaware of the status of their reports. Therefore, we plan to send letters to Presidents of institutions on October 15 for institutions that have not yet completed their edits or submitted their report to us. A second (different) letter will be sent to Presidents on November 1 for those schools that have not yet submitted their certification.
- **F.** Once your file is error free, a certification form and final Excel files are sent to you for review and signature. These are sent to the generic email address.

REMINDERS

Special Circumstances – Overriding our Limits: In those cases in which we have identified correct data as errors, you will need to send us something in writing that indicates the information is correct and that you authorize us to override our editing process to accept the unexpected value. The written statement should be e-mailed to Tanya Sifuentes at Tanya.sifuentes@thecb.state.tx.us. If such an override is used to resolve the final error(s) remaining in an institution's file, the institution will be sent a copy of our message to Information Services, indicating the school's report is now complete and may be added to the state's database.

FINANCIAL AID DATABASE SEQUENCE OF ACTIVITIES



TECHNOLOGY

Header and Trailer Records
SFTP Instructions for Transmitting Your File
Manual for Data Entering into Online Web System
To be used by Institutions without SFTP capabilities ONLY
Security of FADS data
Related Questions and Answers

Header Record Format

Header Record Example:

HY2K000781FAD00112006C036801500

		<u>Value</u>	<u>Position</u>	<u>Length</u>
Item #1	File Label-Id	HY2K	1	4
Item #2	Institution Code FICE - (Numeric) (i.e. 00	6 digits 00781)	5	6
Item #3	Data Identifier	FAD001	11	6
Item #4	Semester in which report is due (Numeric)	Fall = 1	17	1
Item #5	Year – YYYY (4 digits) State fiscal year (Numeric)	2006 covered by report	18	4
Item #6	Record Type	(C)omplete Report	22	1
Item #7	Length of Data records (Numeric)	0368	23	4
Item #8	Number of Aid Applicants (Numeric) (i.e. (right justified and leading	•	27	5

TRAILER RECORDS

Trailer example: EOF100975

Item #1	File Label-ID	<u>Value</u> EOF1	<u>Position</u> 1	<u>Length</u> 4
Item #2	Record Count (Numeric)	Number of data records in file not including "Header" And "Trailer" records	5	5
	Reserved for Future	Use (spaces)	10	71
Total Reco	ord Size			80

Using SFTP to Transfer Financial Aid Database Reports

Over the years the Texas Higher Education Coordinating Board has utilized various methods to collect the required educational reports. Initially, paper forms and round reel tapes were used to transport these reports. As the internet grew, so did the use of the FTP protocol as a means to transfer these reports. FTP is almost universally deployed on every computing platform from mainframe to PC. FTP has served quite well for this purpose; however, the Internet is becoming increasingly hostile and many organizations are adopting policies that prohibit the transfer of data over unencrypted channels. Secure methods of transferring data must be implemented to satisfy these demands.

The Coordinating Board will require and distribute reports with the Secure Shell (SSH) and Secure FTP (SFTP) combination beginning July 15, 2004. SFTP is a logical replacement for FTP. The SFTP user interface will be familiar for FTP users. SFTP provides a secure channel for file transfer without the overhead and complexity of separate public key-based encryption. In SSH/SFTP transfers, all username/password and data transfer occurs over an encrypted channel. SFTP will be implemented using usernames and passwords similar to the current FTP system. SSH/SFTP provides some flexibility for authentication; in the future username/password-based authentication can be supplemented with shared host keys permitting script driven transfers if needed.

<u>Instructions for Usernames and Passwords</u>

In order to submit FADS files, you must log into the SFTP server with a username and password.

FADS Username

If you are a FADS user, your username will be 'fasNNNNNN00' where 'NNNNNN' is your FICE code. For example, if your FICE code is 123456, then your SFTP username will be 'fas12345600'.

FADS Password

Your FADS reporting official may already have your institution's password for the sftp.thecb.state.tx.us server. If you require your initial password, you should contact the THECB official in the contact information section below. You may request your password through e-mail; however, passwords will only be distributed by voice call or postal mail. If you are requesting your password through mail, specify your name, phone, institution, and head reporting official. The THECB contact staff (below) will then call you to deliver your password. The passwords are the same as the passwords used for submitting your TEXAS Grant Year-End Student-by-Student Report.

Contact Information

The THECB staff contact for obtaining your password is:

Tanya Sifuentes. Her email address is <u>tanya.sifuentes@thecb.state.tx.us</u>, the phone number is (512)427-6123;

OR

Torca Bunton. Her email address is torca.bunton@thecb.state.tx.us, the phone number is (512)427-6532.

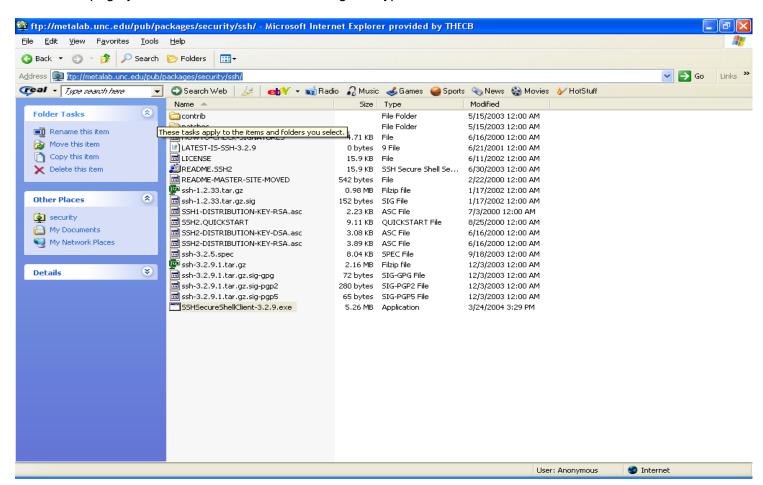
The requirements for connecting to the SFTP server are an SSH/SFTP client and an internet connection that permits SSH connections to internet servers. There are excellent commercial and free implementations of SSH/SFTP available for use on windows platforms. Your ability to connect to SSH servers on the internet is going to be contingent upon your network security policies. You may need to

contact your technical staff to determine if outbound SSH is permitted from your network. The following is the suggested downloadable SSH client to use for connecting to THECB SFTP.

SSH Secure Shell for Workstations – SSH Communication Security

SSH Secure Shell is an easy-to-use graphic SFTP client similar to the popular WS_FTP client for FTP servers. At the time of writing, the SSH Secure Shell license agreement allows use of the non-commercial version (3.2.9) available at the FTP site for educational institutions, non-profit organizations, and individuals for non-commercial use free of charge. Review the license agreement to determine if this is suitable for your environment. SSH.com has downloads for several operating systems on their FTP site. Windows users will require the installation file SSHSecureShellClient-3.2.9.exe. Please note that the latest version of this software (4.0) does not have a non-commercial version available. Non-commercial versions of the SSH.com client can be found at ftp://metalab.unc.edu/pub/packages/security/ssh/

Here is the page you will be taken to after selecting the hyperlink above:



After linking to this web page, double-click the SSHShellSecureClient-3.2.9.exe application file to begin the automatic download of the SFTP client. After the download is complete, you will notice that 2 desktop icons have been installed on your PC. You will only be interested in the icon entitled "SSH Secure File Transfer Client". You can disregard the other icon entitled "SSH Secure Shell Client".

SSH Secure File Transfer Client

If you are using SSH.com's SSH Secure Shell for Windows Workstations, execute the following steps to connect to the server.

- 1. Start the "SSH Secure File Transfer" client by clicking on the desktop icon or selecting it from the start menu.
- 2. You must enter the Host Name, Username, Port Number and Authentication method as described in the **SSH First Time Setup** below.
 - a. Then, a "message from server" dialog box appears; select OK
 - b. Then, enter your password in the password dialog box.
- 3. At this point you should be connected. Your local files will appear on the left and files on the remote SFTP server will appear on the right. You will need to browse the files on your local machine and drag them to the right to transfer them to the SFTP server. When a transfer is in progress, a transfer progress display will appear at the bottom.

SSH First Time Setup

- 1. Open SSH Secure File Transfer Client (icon)
- 2. Click on Quick Connect

a. Enter Host Name: sftp.thecb.state.tx.us

b. Username: fas 12345600 (Replace 123456 with your FICE code)

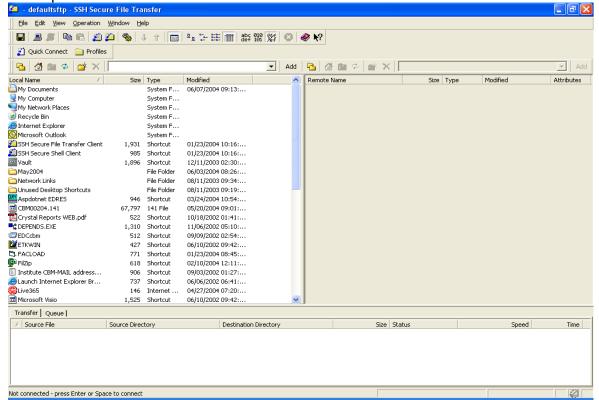
c. Port Number: 22

d. Authentication Method: <Password>

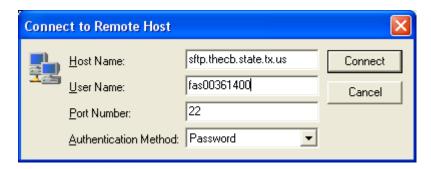
3. After the initial connection you will want to add the connection to the profile to simplify future connection. You should see a blinking 'Add to Profile' in the dialogue box above the OUTPUT folder in the right pane. Click it, change the name to something like "thecb-sftp," and click 'add to profile.' After this you should be able to connect by clicking the Profiles tab on the menu bar, then selecting your saved "thecb-sftp" profile, then entering your password directly without re-entering the hostname, username, port, authentication method.

Transfer Files

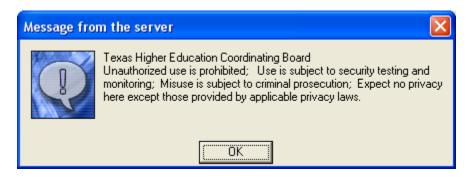
The picture below is the first in the series of steps described above to log into the SFTP server. This picture is of what you will see upon double-clicking the SSH Secure File Transfer Client icon on your desktop.



Next, select the "Quick Connect" tab on the menu bar and you will be prompted with a "Connect to Remote Host" dialog box, as seen below. At this point, enter the host name just as you see it below. Then, enter your user name as "fas" followed by your institution's FICE code plus two zeroes. Be sure to include the leading zeroes in your FICE code. Example: if your FICE code is 003614, then your username will be "fas00361400." Leave the port number and Authentication method selections as you see them below.



After successfully navigating the "Connect to Remote Host" dialog box (hit the "Connect" button), you will be prompted with an informational dialog box as seen below. Select "OK."



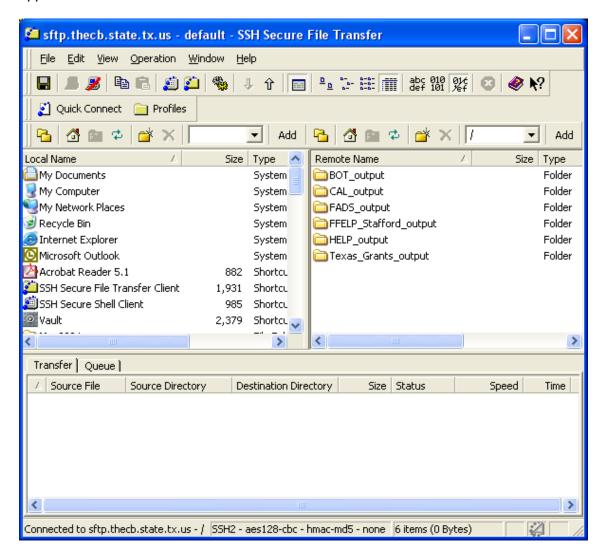
Now, you will be prompted for your password as seen in this next dialog box. If you need this password, call Tanya Sifuentes at 512-427-6123 or Torca Bunton at 512-427-6532 and they will provide it to you.



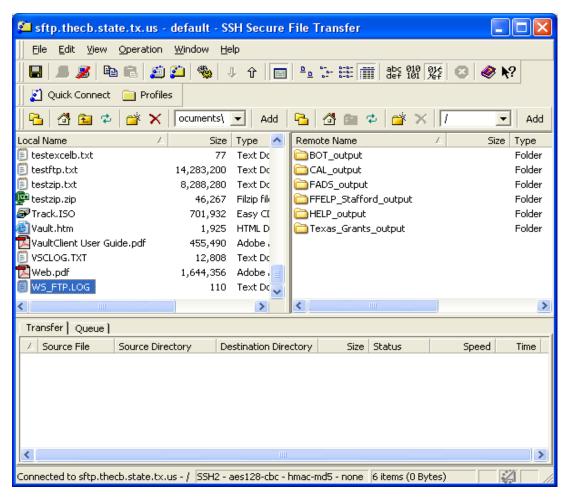
NOTE: The key exchange process of secure shell provides some protection against spoofing and man-in-the-middle attacks. If you attempt a transfer and get a message indicating that the server's key has changed without prior notification from THECB, you should treat the connection as suspicious and contact network security.

After successfully entering your password, you will see the next screenshot. Notice the "/" in the far right "drop down" list box above the OUTPUT folder in the right pane. This represents your INPUT folder on the SFTP server. You are automatically logged into the INPUT folder each and every time you log in to the SFTP server, regardless of which folder you intend to access (i.e., INPUT or OUTPUT). What you are looking at in the right pane of this screenshot is similar to a Windows Explorer view. The "/" represents a top-level folder (INPUT in this case) and the OUTPUT folders you see below that in the right pane represents varying financial accounts subordinate folders. Thus, if you intend on "submitting" a file to the

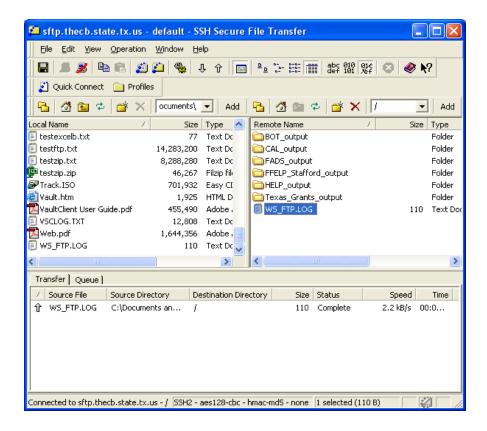
THECB, then you will drag your file from the leftmost pane of this view and drop it onto the empty white space of the right pane. If you drop this file on top of the OUTPUT folders, you will be inadvertently placing your submission in your OUTPUT folders, whereby it will not be picked up and processed by our pre-edit application.



As depicted below, the highlighted file at the bottom of the left pane in this screenshot represents a file which is intended to be "submitted" to the THECB SFTP server. NOTE: You are still in your INPUT folder at this point (notice the "/" in the drop down list box above your OUTPUT folders). The highlighted file below must be dragged (with the left mouse button depressed) over to the empty white space in the right pane. This will place a copy of the file in your INPUT folder on the SFTP server. It will then be picked up and processed by the pre-edit application. Also, within 30 minutes of placing your file on the SFTP server, you should receive a "file receipt notification" email. If you notice that you have not received this notification email, please call your data analysts to discuss this with them.

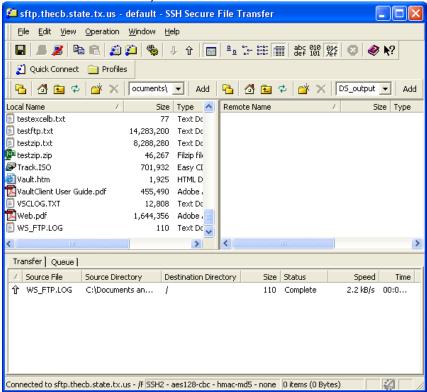


As seen on the screen shot on the next page, you will notice that the file you selected and highlighted has been placed in your INPUT folder after dragging and dropping it into the right pane. You are still in your INPUT folder at this point. The file submission is complete and if you have no other files to transfer, then you can select the "disconnect" icon in the menu bar to exit this SFTP application. The disconnect icon will be the third button from the left under the "File" menu. It looks like a computer monitor with a red line through it.



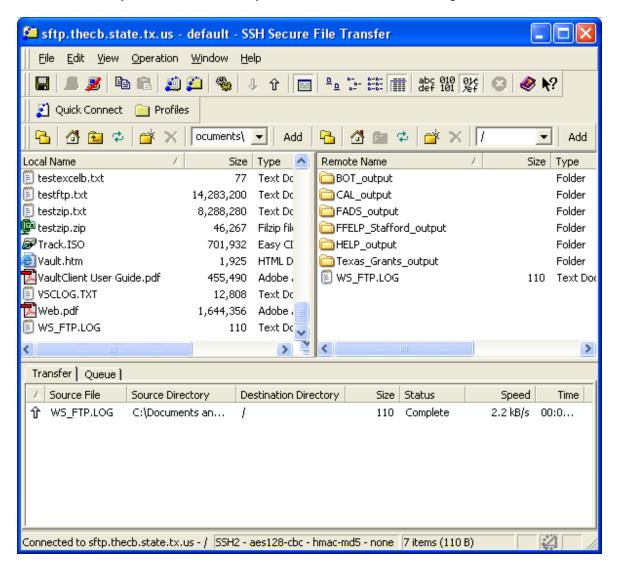
Retrieve Files

As seen below, if you wanted to go to your OUTPUT folders to retrieve reports, then you would double click the OUTPUT folder you intend to see (e.g. FADS_OUTPUT in this case) in the right pane. The drop down dialog box above the right pane would change to "/FADS_OUTPUT". At this point, you would be looking at all the output reports that have been placed in your FADS OUTPUT folder by the pre-edit application (none in this case at this time).



If you have been in your OUTPUT folder on the SFTP server and would like to get back to the INPUT folder, then you would select the "up arrow folder" icon located just above the right pane and four icons to the left of the drop down dialog box.

As seen below, you are now back in your INPUT folder after coming from the OUTPUT folder.



At this point, if you are finished transferring files to/from THECB's SFTP server, just disconnect and exit the application.

<u>NOTE:</u> Please disconnect promptly from the SFTP session after successfully transferring your files. Staying connected to the SFTP server will cause your transferred files to be inadvertently deleted off the server by a synchronization process that runs on the server. Also, please do NOT log into the SFTP server at the :03 minute and :33 minute times of the hour because that is when the synchronization process runs; it will for sure delete your transferred files at that precise moment if you are logged into an SFTP session at those two times.

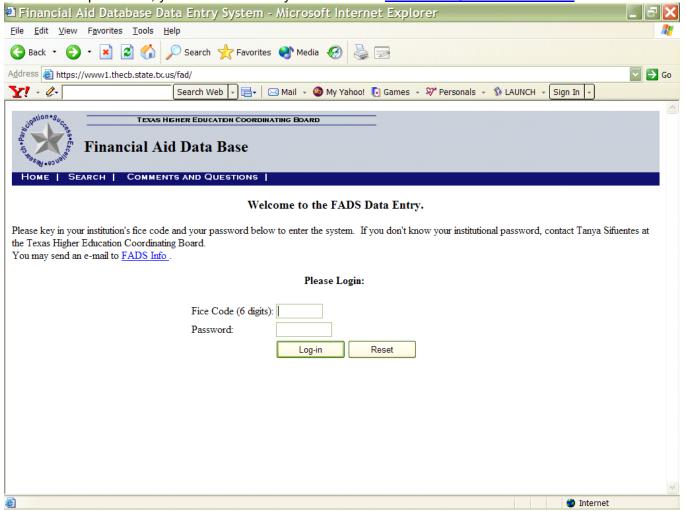
DATA ENTRY INSTRUCTIONS FOR ENTERING INTO THE FADS ONLINE WEB SYSTEM

(for Institutions without Programming Support)

Welcome to the FADS Web System, to be used if your institution is unable to create an independent file to SFTP to the Coordinating Board. You create your FADS report by entering your student's records online using the Coordinating Board web system. This is not something that can be used to download information into from another program.

Go To www.thecb.state.tx.us, click on Data and Statistics, click on Financial Aid Database System (FADS) or go to https://www1.thecb.state.tx.us/FAD/

The first screen you will see (shown below), will ask you to enter in your institution's six-digit FICE code and password. The password is the same password you have used to process your FADS report. If you don't have a password, you can e-mail Tanya Sifuentes at fadsadmin@thecb.state.tx.us.



You have three options (shown below is the first screen):

- 1. If it is the first time you are entering into the system, you will need to click on the "Add New Student" button;
- 2. If you have already entered students into the system, and you need to edit a student's information, click on the student's ssn at the bottom of the screen;
- 3. If you have finished entering students into the system, click on the "Report" button and your records will be submitted to the CB (this will be covered later in the manual).

ipation Suc	TEXAS HIGHER EDUCATION COORDINATING BOARD	
No.	STUDENT-BY-STUDENT ONLINE DATA	ENTRY SYSTEM
HOME SEA	ARCH COMMENTS AND QUESTIONS	

DATA ENTRY SCREEN INSTRUCTION MANUAL (PDF) (MSWORD)

To ADD a new student, click the "Add New Student" button at the bottom of the screen.

To SUBMIT your entire report for editing, click the "Report" button at the bottom of the screen (done only after you have entered in all of your student records).

To VIEW, EDIT or DELETE an individual Student's Record, click on a student's social security number below.

To SEARCH for a student by social security number, enter the SSN in the text box below and click on the "Search Button"

Below are the student records entered for your institution:

SSN	Student Income	SS Benefits	or	Child Support Received by Student		Motner's	Parents' SS Benefits	AFDC,	Child Support Received by Parents	Ethnic Origin	Classification	Dependency Status
555889999)									White- Non- Hispanic	Undergraduate	Dependent- Title-IV

Add New Student

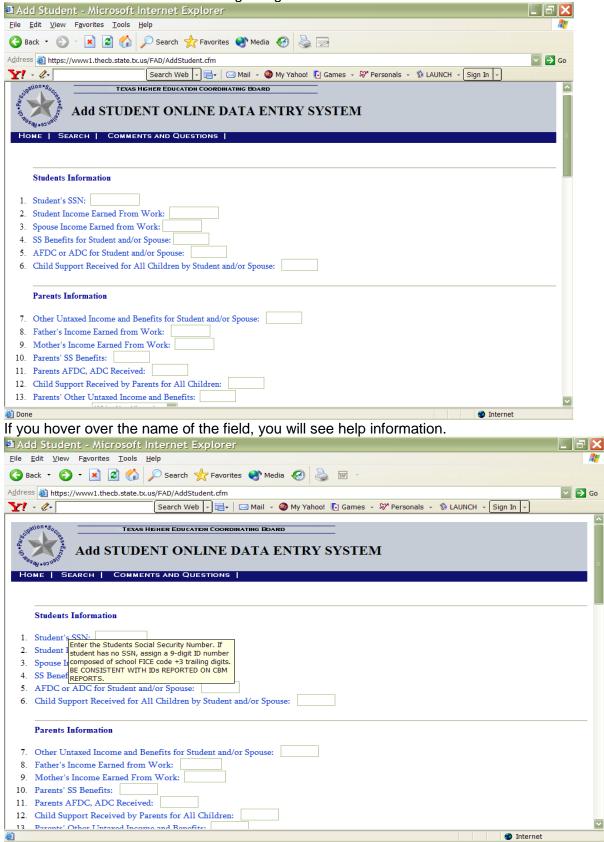
Before you click on the REPORT button to submit your file for editing:

Enter the number of aid applicants (5 digits with leading zeroes):

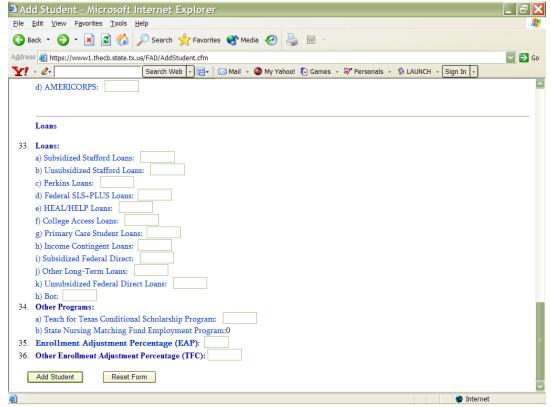
(This number comes from your FISAP Report and is the number of students that applied for aid).

Report

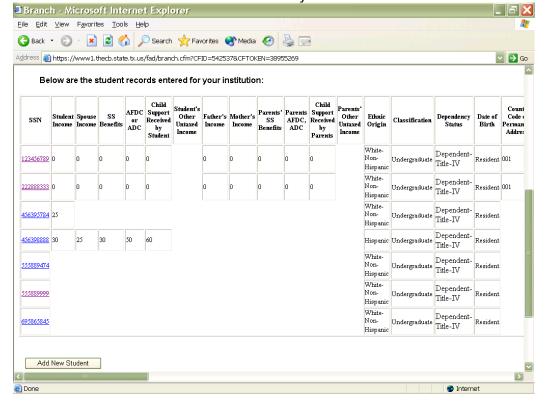
1. The screen below is what the beginning of a blank form looks like.



Once you have finished entering information for one student, click on the Add Student button at the bottom of the screen. Click on Add New Student at the bottom of the main page to continue entering information for another student.

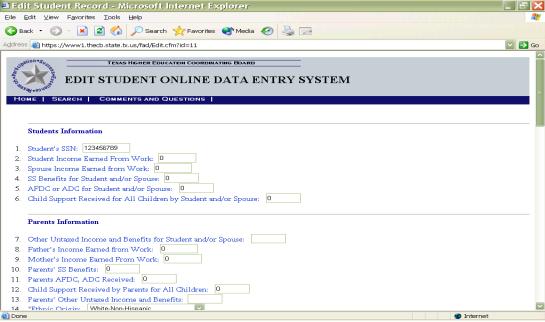


2. At the bottom of the main page all of the student's that have already been entered will be shown, see below. Click on a student's ssn if you need to edit that student's record or if you need to delete that student's record from the system.

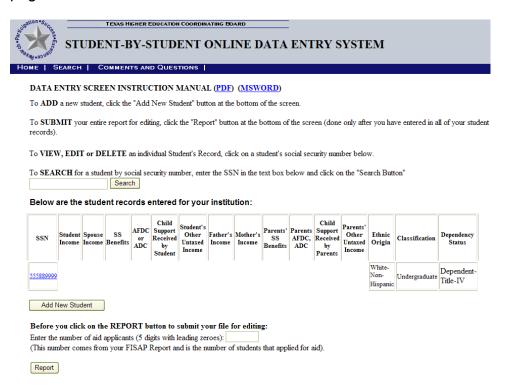


When you click on the student's ssn to edit or delete their record, you will see the data entry

screen with their information populated, shown below.



3. Once you have finished entering all of your student records and you are ready to submit your report for editing by our system, enter in the number of aid applicants at the bottom of the main page. Then click on the "REPORT" button.



Your records will be submitted to the CB and you will receive a file receipt confirmation, just as if you had submitted your report by SFTP. Once the report has been processed, you will receive an error report.

If you have any questions or problems, you can contact us at fadsadmin@thecb.state.tx.us.

Frequently Asked Questions

IV. RELATED TO TECHNOLOGY AND TRANSMITTING YOUR FILES

FORMAT

Question 1. My office has very little computer support. Can I submit my report on paper?

No. Since no funding was provided to support the development of the statewide database, we cannot hire data entry clerks to enter your information onto our system.

For schools with computers but no programmers to massage the data already on file, the simplest approach to meeting this reporting requirement will be to use the online data entry screen located at www1.thecb.state.tx.us/FADS/. Instructions are provided on page 49.

TRANSMITTING DATA

Question 2. How will the electronic transfer of our financial aid data be accomplished? Files must be submitted to the Coordinating Board either by:

- SFTP (Secured File Transfer Protocol), see instructions on page 39; or
- Data entering student records onto our website at <u>www1.thecb.state.tx.us/FADS/</u>

Question 3. How is data to be submitted to the Coordinating Board?

Data MUST be submitted in computer-readable form. No funding was provided by the Legislature to hire data entry clerks who could work with paper reports. Data should be submitted to the Coordinating Board through use of an electronic network. Among the most familiar network is the Internet. If you are a public institution, your reporting official has probably been sending its CBM reports to the Coordinating Board using one of the networks. Data must be submitted as ASCII text files.

Question 4. What should we do when we have data ready to send to the Board?

If your school has ANY Internet connections on campus, use those connections to send your data. Instructions for using Internet connections are enclosed in this manual.

If your school has NO access to Internet, contact Tanya Sifuentes at tanya.sifuentes@thecb.state.tx.us.

Question 5. What is the Coordinating Board doing to secure our student records?

Files that are submitted to the Coordinating Board are now transmitted over our Secured File Transfer Protocol. The new process ensures that all files are secure.

TIMING

Question 6. When is the transmission of data due?

The annual report will be due on October 15 of each year and will cover your financial aid activities during the previous academic year. Submission of the report is recommended as soon as your institution can submit. THIS IS THE <u>FINAL</u> DEADLINE TO HAVE A COMPLETED PASSED VERSION OF ALL YOUR DATA!!!

Question 7. How will I know I am ready to submit data?

The report is a year-end report and covers the previous academic year. Your data may be submitted at any time after your academic year has ended and you have completed your files. The LATEST you can submit your data is October 15 of each year. We urge you to submit it as soon as possible after the close of your academic year, but no earlier than July 1, the start of our processing year.

HEADER RECORD

Question 8. What institution code should be used in the header record?

The six-digit "FICE" code assigned by the federal government. (This is the same identification number submitted on grant and loan applications. An example would be 003604 for Rice University.)

Question 9. What about the name and e-mail address of the contact person?

You are no longer required to include the name and e-mail address. Please remove this from your header record. We keep separate records of the contact person and the "generic" e-mail address.

ELECTRONIC CYCLE

Question 10. What will happen when we submit data?

When data are submitted to the Coordinating Board, they will be run through an edit program, which will check to make sure your file is compatible with our required format in terms of spacing, field lengths, order of data elements and justification (numbers are right justified; alphabetic fields are left justified). The edit program will also check to make sure the figures you are submitting fall within acceptable ranges.

If errors are detected or your data appear questionable, you will be sent a notification (by electronic network), which will indicate the location of your error report. Your error report will list which fields are in error or have values we believe need review. Error messages must be corrected; warnings should be reviewed for accuracy.

You must then resubmit the ENTIRE file once the noted errors have been corrected. None of your students' data will be added to the statewide database until all of your errors have been eliminated in this fashion. A file with warnings can be accepted. See page 35 of the manual for a flowchart of the reporting cycle.

TRIAL RUN

Question 11. Is there a way for me to do some trial runs before trying to submit my full report in fall?

YES. In fact, ALL schools are encouraged to submit a set of sample records prior to submitting their full report. The sample records may be "dummy" (*i.e.*, made up) or valid for the current year. The purpose of the trial run will be to provide time to iron out any problems in record keeping or data transmission long before the final report is due.

Question 12. What should we do when we have data ready to send to the Board?

You should check your data first, to make sure it is formatted to be accepted by our system. Have the financial aid office check your data, to make sure it accurately reflects the activities of his/her office. Once the information is correct, you should SFTP your report.

EDITS/ERRORS

Question 13. When we submit our reports to the Board, will our correct data be accepted and only our errors be rejected?

No. Only full reports with no errors will be added to the statewide database. If you have errors in your report, your full report will be rejected. An error report will be generated, indicating which records have errors, and indicating the fields in which the errors exist.

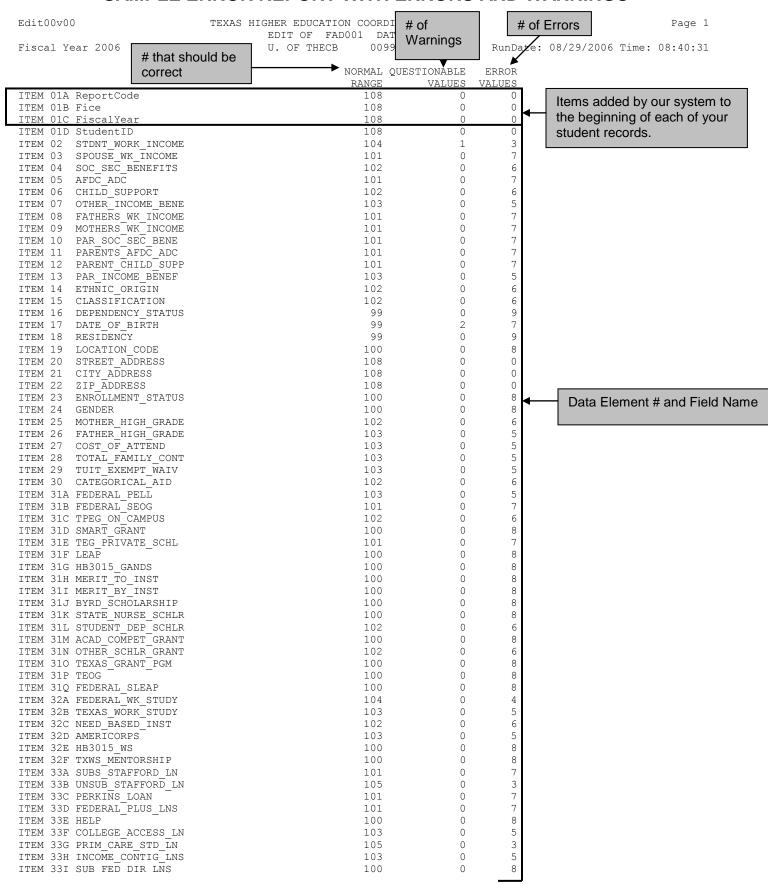
Question 14. When we have provided the Coordinating Board proof that field values rejected by the system are actually correct, how will we know when our report is complete?

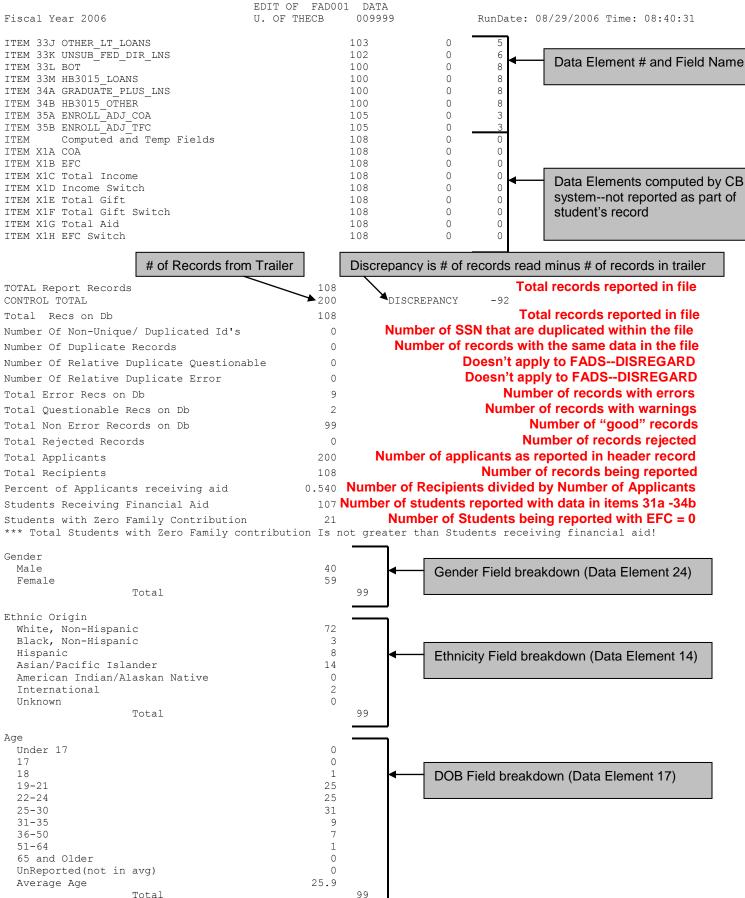
We will do two things. 1) We will send you a copy of our e-mail to data processing, advising them to allow the file to be accepted based on information received from your office, 2) you will be sent a demographic and program summary report along with a certification memo that is to be completed and returned to us after reviewing your data.

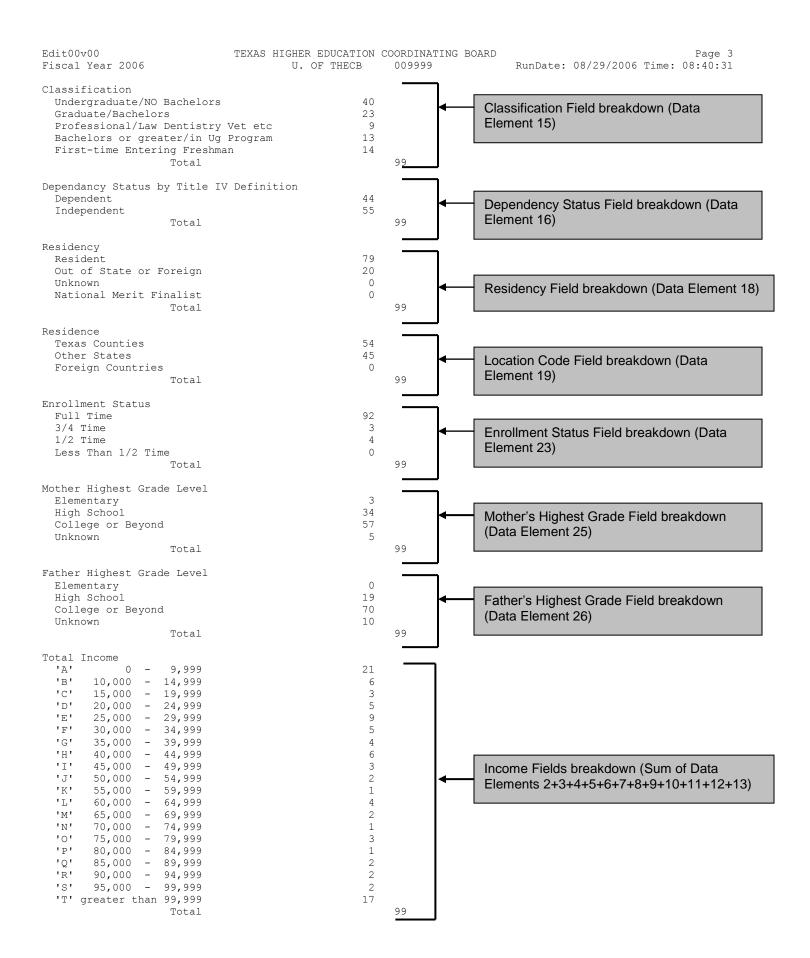
REPORTS

SAMPLE ERROR REPORT
SAMPLE CERTIFICATION AND SUMMARY REPORT
FORMULAS FOR COLUMNS IN PROGRAM SUMMARY REPORT

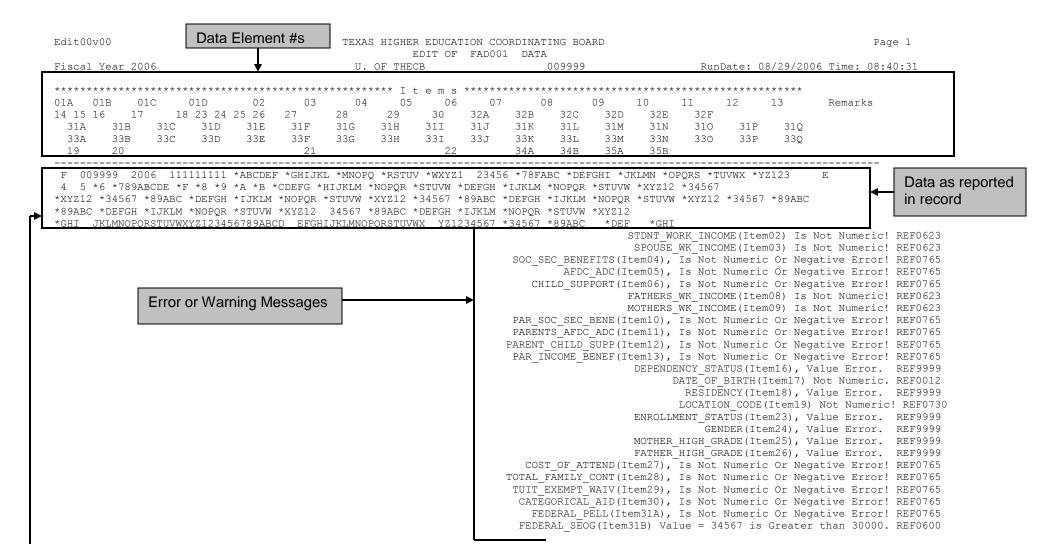
SAMPLE ERROR REPORT WITH ERRORS AND WARNINGS







Fiscal Year 2006 U. OF THECB 009999 RunDate: 08/29/2006 Time: 08:40:31 Total Gift 1011 0 250 21 **`**02′ 251 500 15 1031 501 750 12 **`**04′ 751 - 1,000 5 1051 1,001 - 1,250 1 Gift Aid Fields breakdown (Sum of Data Elements 1061 - 1,500 1,251 20 - 1,750 31c+31d+31e+31f+31j+31k+31l+31o+31p+31n+31q) 1077 1,501 0 180' 1,751 - 2,000 9 2,001 - 2,250 1091 0 - 2,500 **`**10′ 2,251 0 - 2,750 **'11'** 2,501 2 1121 2,751 - 3,000 Ω **13**′ - 3,250 3,001 14 - 3,500 **14**′ 3,251 Ω 3,501 1157 - 3,750 0 - 9,998 116' 3,751 0 Total \$ Awarded '00' greater than 9,999 0 99 Total Minimum Award Maximum Award Financial Aid Data Fields Total # Students **Amount Reported Amount Reported** Data Element # and Field Name Grants & Scholarships Dollars 31 Students Min Amt Maximum Amt 4,050 200 31A FEDERAL_PELL 13 27,825 31B FEDERAL SEOG 5 10,018 490 4,000 31C TPEG_ON_CAMPUS 5,026 36 39,733 207 31D SMART GRANT 31E TEG PRIVATE_SCHL 0 0 0 0 31F LEAP 0 0 0 0 31G HB3015 GANDS 0 0 0 0 31H MERIT_TO_INST 0 0 0 0 31I MERIT_BY_INST 0 0 0 0 31J BYRD SCHOLARSHIP 0 Ω 0 Ω 31K STATE NURSE SCHLR 31L STUDENT_DEP_SCHLR 712 712 712 1 31M ACAD COMPET GRANT Ω 0 0 0 150 31N OTHER SCHLR GRANT 68 56,997 18,200 310 TEXAS_GRANT_PGM 6 18,666 2,966 3,140 31P TEOG 0 0 0 0 31Q FEDERAL SLEAP 0 0 0 0 Work-Study Dollars Min Amt Maximum Amt 32 Students 32A FEDERAL WK STUDY 3 8,208 2,170 3,499 32B TEXAS WORK STUDY 0 0 0 0 32C NEED BASED INST 0 0 0 0 32D AMERICORPS 0 0 0 0 32E HB3015_WS Ω 0 Ω Ω 32F TXWS MENTORSHIP 33 Students Dollars Min Amt Maximum Amt Loans 33A SUBS STAFFORD LN 508 66 374,319 12,313 33B UNSUB_STAFFORD_LN 65 440,630 687 17,944 33C PERKINS LOAN 24 46,648 180 6,000 33D FEDERAL PLUS LNS 15 143,749 4,093 16,310 33E HELP 0 33F COLLEGE ACCESS LN 0 0 0 0 33G PRIM CARE STD LN 0 33H INCOME CONTIG LNS Ω Ω Ω Ω 33I SUB FED DIR LNS 0 0 0 0 33J OTHER LT LOANS 12 92,375 1,004 19,764 33K UNSUB_FED_DIR_LNS Ω Ω Ω Ω 33L BOT 33M HB3015 LOANS 0 0 0 0 Other Programs 34 Students Dollars Min Amt Maximum Amt 34A GRADUATE PLUS LNS 0 0 0 0 34B HB3015_OTHER 0 0 0 ***Note: Totals are net errors. 🥆 Totals above do not include records with errors



■►Items In Error Are Indicated By (*), Questionable By (-)

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Fiscal Year 2006 U. OF THECB 009999

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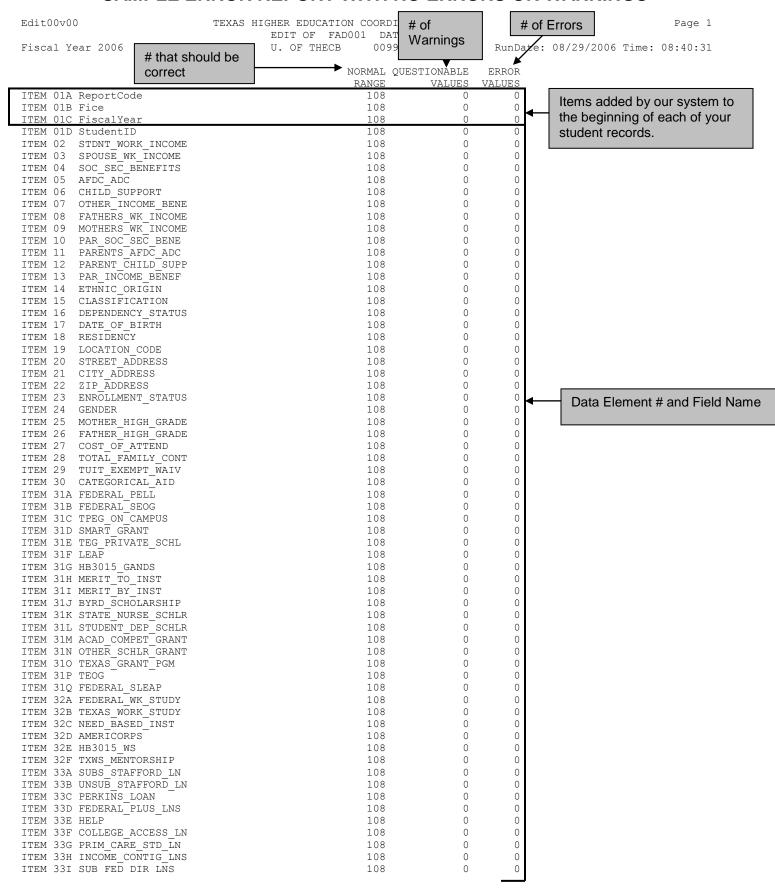
Items In Error Are Indicated By (*), Questionable By (-)

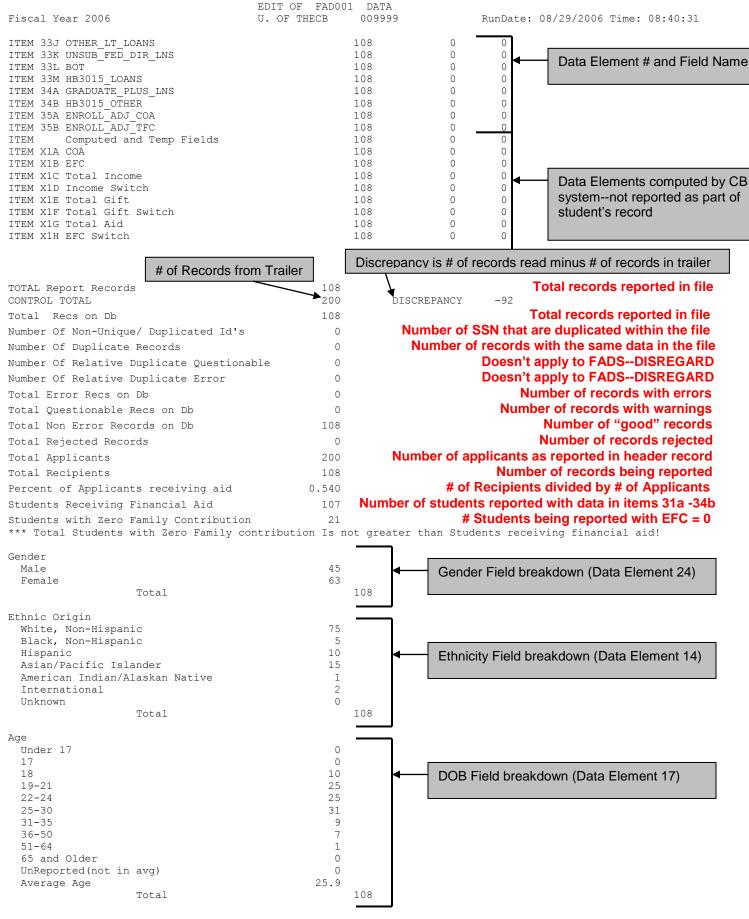
Edit00v00	TEXAS HIGHER EDUCATION COORDINATING BOARD	Page 3
	EDIT OF FADOO1 DATA	

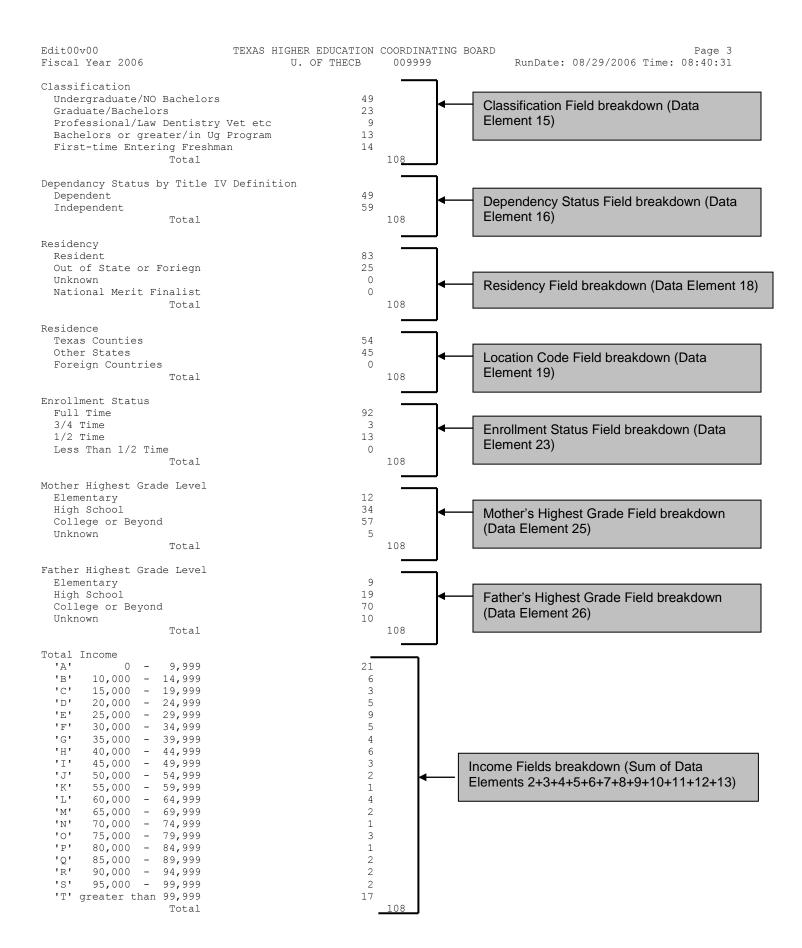
								1	DIT OF	FADUUI	L DATA	A							
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		ds On					-	108											
Total	Non E	rror R	ecor	ds				99								_	records		
Total	Error	Recor	ds					9					N	lumber	of reco	rds wit	h errors		
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Total	Rejec	ted Re	cord	s				0						Numb	er of re	cords	rejected		

Items In Error Are Indicated By (*), Questionable By (-)

SAMPLE ERROR REPORT WITH NO ERRORS OR WARNINGS







Fiscal Year 2006 U. OF THECB 009999 RunDate: 08/29/2006 Time: 08:40:31 Total Gift 1011 Ω 250 21 **`**02′ 251 500 15 1031 501 750 12 1041 751 - 1,000 5 1051 1,001 - 1,250 1 Gift Aid Fields breakdown (Sum of Data Elements - 1,500 **'**06' 1,251 20 - 1,750 31c+31d+31e+31f+31j+31k+31l+31o+31p+31n+31q) 1077 1,501 0 1081 1,751 - 2,000 9 - 2,250 1091 2,001 0 - 2,500 **`**10′ 2,251 0 **`11'** 2,501 - 2,750 2 **12**′ 2,751 - 3,000 1 **13**′ 3,001 3,250 14 1141 3,251 - 3,500 8 1157 3,501 **-** 3,750 0 - 9,998 116' 3,751 0 Total \$ Awarded '00' greater than 9,999 0 Total Minimum Award Maximum Award Financial Aid Data Fields Total # Students **Amount Reported Amount Reported** Data Element # and Field Name Grants & Scholarships Dollars 31 Students Min Amt Maximum Amt 4,050 200 31A FEDERAL_PELL 13 27,825 31B FEDERAL SEOG 5 10,018 490 4,000 31C TPEG_ON_CAMPUS 39,733 36 5,026 207 31D SMART GRANT 31E TEG_PRIVATE_SCHL 0 0 0 0 31F LEAP 0 0 0 0 31G HB3015 GANDS 0 0 0 0 31H MERIT_TO_INST 0 0 0 31I MERIT_BY_INST 0 0 0 0 31J BYRD SCHOLARSHIP 0 0 0 Ω 31K STATE NURSE SCHLR 31L STUDENT_DEP_SCHLR 712 712 712 1 31M ACAD COMPET GRANT Ω 0 0 0 31N OTHER SCHLR GRANT 68 56,997 150 18,200 310 TEXAS_GRANT_PGM 6 18,666 2,966 3,140 31P TEOG 0 0 0 0 31Q FEDERAL SLEAP 0 0 0 0 Work-Study Dollars Min Amt Maximum Amt 32 Students 32A FEDERAL WK STUDY 3 8,208 2,170 3,499 32B TEXAS WORK STUDY 0 0 0 0 32C NEED BASED INST 0 0 0 0 32D AMERICORPS 0 0 0 0 32E HB3015_WS Ω 0 Ω Ω 32F TXWS MENTORSHIP 33 Students Dollars Min Amt Maximum Amt Loans 33A SUBS STAFFORD_LN 66 374,319 508 12,313 33B UNSUB_STAFFORD_LN 65 440,630 687 17,944 33C PERKINS LOAN 24 46,648 180 6,000 33D FEDERAL PLUS LNS 15 143,749 4,093 16,310 33E HELP 0 33F COLLEGE ACCESS LN 0 0 0 0 33G PRIM CARE STD LN 33H INCOME CONTIG LNS Ω Ω Ω Ω 33I SUB FED DIR LNS 0 0 0 0 33J OTHER LT LOANS 12 92,375 1,004 19,764 33K UNSUB_FED_DIR_LNS Ω Ω Ω Ω 33L BOT 33M HB3015 LOANS 0 0 0 0 Other Programs 34 Students Dollars Min Amt Maximum Amt 34A GRADUATE PLUS LNS 0 0 0 34B HB3015_OTHER 0 0 0 ***Note: Totals are net errors. 🥆 Totals above do not include records with errors

Edit00v00 TEXAS HIGHER EDUCATION COORDINATING BOARD Page 5

EDIT OF FAD001 DATA
Fiscal Year 2006 U. OF THECB 009999 RunDate: 08/29/2006 Time: 08:40:31

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****	*****	*****	****	****	*****	****	**** I t	ems	*****	****	*****	*****	****	*****	*****
01A	01B	01C	01D	02	03	04	05	06	07		08	09	10	11	12
13	Rema	rks													
14 15	16 1	7 18	8 23 24	25 26	27	28	29	30	32A	32B	32C	32D	32E	32F	
31A	31B	31C	31D	31E	31F	31G	31H	31I	31J	31K	31L	31M	31N	310	31P
31Q															
33A	. 33B	33C	33D	33E	33F	33G	33H	33I	33J	33K	33L	33M	33N	330	33P
33Q															
19	20				21			22		34A	34B	35A	35B		
Total	Rejecte	d Record	ds			0						Numb	er of re	cords i	ejected
Total	Records	On Data	aBase			108					•				d in file
Total	Non Err	or Reco	rds			108						Num	ber of "	'good"	records

Number of records with errors

Number of records rejected

Number of records with warnings

Items In Error Are Indicated By (*), Questionable By (-)

Total Error Records

Total Rejected Records

Total Questionable Records

SAMPLE CERTIFICATION OF SUMMARY REPORTS

TO: Director of Financial Aid Addressed

FROM Tanya Sifuentes

System Support Specialist

Texas Higher Education Coordinating Board

SUBJECT: Certification of Data Submitted through the Financial Aid Database for FY06

The attached files are summary reports generated from your FY06 Financial Aid Database. Please review them and make sure they accurately reflect the activities of your office. Our editing process allows us to check for values that fall within acceptable ranges (for instance, no more than \$1250 for LEAP). Only you can determine whether the approved data are appropriate for your school (for instance, that you had 500 LEAP awards last year). Pay special attention to the row labeled "CB In-house Reports:" on the program summary report spreadsheet. This data is from your FY2006 year-end reports and from mainframe reports for the following programs:

TEG LEAP Nursing Scholarships TCWSP

SLEAP TEXAS Grant TEOG

For the database numbers to be correct, the two data sets must be in agreement. For example, if you reported \$2,000 and 2 awards when you submitted your Texas College Work-Study Program Year-End Report, those same numbers should appear on the database. If the numbers are not consistent, you will need to correct the report that is not accurately reflecting your figures, whether it be the Financial Aid Database Report or the CB reports. Please let me know which report you will be correcting.

If you have any questions regarding the information contained in these files, please feel free to contact me. These attachments are being sent to you in excel format.

A certification form is included at the bottom of this e-mail, which we ask you to complete and return to us as soon as you have reviewed the information in the excel files and believe it is correct. You are not being asked to certify the unmet need calculations at the end of the program summary report. We understand that you are unable to verify that data. When we receive your completed form, we will consider it to be your certification for the data.

If the data does not seem correct, correct the relevant records and resubmit your database file. It will override any files for FY06 previously received for your school. Once the edits are clear again, we will resend you the reports and a new certification form. Thank you for your cooperation.

CERTIFICATION STATEMENT FOR OUR FY06 FINANCIAL AID DATABASE REPORT

I hereby certify that I have reviewed both summary reports returned to me by the Coordinating Board, and that they accurately reflect the activities in our office for the 2005-2006 academic year.

Institution Name/Fice Code: Today's date:

Financial Aid Officer responding to this survey:

Phone number of respondent: E-mail address of respondent:

Please submit this completed form **ASAP** by e-mail at <u>tanya.sifuentes@thecb.state.tx.us</u>. Thank you!

SAMPLE DEMOGRAPHIC SUMMARY REPORT IN EXCEL

Inatitution	Fice	andar	Ethnia Craun	Income												
Institution	Code G	ender	Ethnic Group	<10,000	<15,000	<20,000	<25,000	<30,000	<35,000	<40,000	<45,000	<50,000	<55,000	<60,000	<65,000	<70,000
	123456 M	ale '	White, non-Hisp	101	70	54	46	59	36	36	16	12	11	7	5	12
	123456 M	ale I	Black, non-Hisp	17	14	11	7	10	4	5	5	5	4	0	2	0
	123456 M	ale	Hispanic	110	68	65	61	81	56	41	25	19	10	12	8	7
	123456 M	ale .	Asian/Pac. Is.	2	0	0	4	5	1	1	1	1	1	0	0	0
	123456 M	ale .	Am. Ind/Alaskan	1	1	0	1	0	1	1	1	1	0	0	0	0
	123456 M	ale (Other	0	0	0	0	0	0	1	0	0	0	0	0	0
	123456 M	ale	Unknown	0	0	0	0	0	0	0	0	0	0	0	0	0
	123456 Fe	emale '	White, non-Hisp	198	97	100	115	96	77	51	43	20	19	13	10	11
	123456 Fe	emale	Black, non-Hisp	33	27	18	12	21	16	11	6	9	1	1	1	3
	123456 Fe	emale	Hispanic	208	120	141	153	157	117	85	49	27	18	14	12	9
	123456 Fe	emale i	Asian/Pac. Is.	13	10	4	9	7	1	2	0	0	0	0	0	1
	123456 Fe	emale	Am. Ind/Alaskan	4	1	1	1	0	3	0	0	1	0	1	0	0
	123456 Fe	emale	Other	1	0	0	0	0	0	0	1	0	0	0	0	0
	123456 Fe	emale	Unknown	0	0	0	0	0	0	0	0	0	0	0	0	0
ABC COLL	_EGE			688	408	394	409	436	312	234	147	95	64	48	38	43

Summary Con't

	Fice			Income	Income	Income	Income	Income	Income	Income				Asian/	Am. Ind/	
Institution	Code	Gender	Ethnic Group	<75,000	<80,000	<85,000	<90,000	<95,000	<100,000	>99,999	White	Black	Hispanic	Pac. Is.	Alaskan	Other
	123456	Male	White, non-Hisp	8	2	4	4	2	3	11	499	0	0	0	0	0
	123456	Male	Black, non-Hisp	1	2	2	0	1	1	1	0	92	0	0	0	0
	123456	Male	Hispanic	6	4	4	0	3	4	9	0	0	593	0	0	0
	123456	Male	Asian/Pac. Is.	0	0	0	0	0	0	1	0	0	0	17	0	0
	123456	Male	Am. Ind/Alaskan	0	0	0	0	0	0	0	0	0	0	0	7	0
	123456	Male	Other	0	0	0	0	0	0	0	0	0	0	0	0	1
	123456	Male	Unknown	0	0	0	0	0	0	0	0	0	0	0	0	0
'	123456	Female	White, non-Hisp	9	13	3	5	5	1	12	898	0	0	0	0	0
	123456	Female	Black, non-Hisp	1	1	1	0	1	1	0	0	164	0	0	0	0
	123456	Female	Hispanic	11	7	3	0	5	3	11	0	0	1,150	0	0	0
	123456	Female	Asian/Pac. Is.	0	0	0	0	0	0	0	0	0	0	47	0	0
	123456	Female	Am. Ind/Alaskan	0	0	0	0	0	0	0	0	0	0	0	12	0
	123456	Female	Other	0	0	0	0	0	0	0	0	0	0	0	0	2
	123456	Female	Unknown	0	0	0	0	0	0	0	0	0	0	0	0	0
ABC COLL	EGE			36	29	17	9	17	13	45	1,397	256	1,743	64	19	3

SAMPLE DEMOGRAPHIC SUMMARY REPORT IN EXCEL, CON'T

	Fice						Bachelors	First Time Entering				
Institution	Code Geno	er Ethnic Group	Unknown	UnderGraduate	Graduate	Professional	or Higher	Freshman	Dependent	Independent	Resident	Nonresident
	123456 Male	White, non-Hisp	0	499	0	0	0	0	224	275	482	17
	123456 Male	Black, non-Hisp	0	92	0	0	0	0	43	49	86	6
	123456 Male	Hispanic	0	593	0	0	0	0	326	267	590	3
	123456 Male	Asian/Pac. Is.	0	17	0	0	0	0	12	5	16	1
	123456 Male	Am. Ind/Alaskan	0	7	0	0	0	0	4	3	7	0
	123456 Male	Other	0	1	0	0	0	0	1	0	1	0
	123456 Male	Unknown	0	0	0	0	0	0	0	0	0	0
	123456 Fema	le White, non-Hisp	0	898	0	0	0	0	288	610	865	33
	123456 Fema	le Black, non-Hisp	0	164	0	0	0	0	57	107	156	8
	123456 Fema	le Hispanic	0	1,150	0	0	0	0	443	707	1,136	14
	123456 Fema	le Asian/Pac. Is.	0	47	0	0	0	0	15	32	46	1
	123456 Fema	le Am. Ind/Alaskan	0	12	0	0	0	0	3	9	12	0
	123456 Fema	le Other	0	2	0	0	0	0	0	2	2	0
	123456 Fema	le Unknown	0	0	0	0	0	0	0	0	0	0
ABC COLL	_EGE		0	3,482	0	0	0	0	1,416	2,066	3,399	83

Summary Con't

Inatitution	Fice	Candar	Ethnia Craun	Linknoven	Full times	2/4 times	1/2 time	Less than	Molo	Famala	Mother Completed	Mother Completed
Institution	Code	Gender	Ethnic Group	Unknown	Full-time	3/4-time	1/2-time	1/2-time	Male	Female	Elementary	High School
	12345	6 Male	White, non-Hisp	0	325	82	82	10	499	0	41	230
	12345	6 Male	Black, non-Hisp	0	63	13	13	3	92	0	6	46
	12345	6 Male	Hispanic	0	400	89	97	7	593	0	94	284
	12345	6 Male	Asian/Pac. Is.	0	12	2	3	0	17	0	2	7
	12345	6 Male	Am. Ind/Alaskan	0	5	1	1	0	7	0	0	5
	12345	6 Male	Other	0	0	0	1	0	1	0	0	1
	12345	6 Male	Unknown	0	0	0	0	0	0	0	0	0
	12345	6 Female	White, non-Hisp	0	578	144	153	23	0	898	100	424
	12345	6 Female	Black, non-Hisp	0	99	25	37	3	0	164	11	64
	12345	6 Female	Hispanic	0	676	183	260	31	0	1,150	210	509
	12345	6 Female	Asian/Pac. Is.	0	29	7	10	1	0	47	6	20
	12345	6 Female	Am. Ind/Alaskan	0	8	1	2	1	0	12	1	6
	12345	6 Female	Other	0	2	0	0	0	0	2	0	2
	12345	6 Female	Unknown	0	0	0	0	0	0	0	0	0
ABC COLL	LEGE			0	2,197	547	659	79	1,209	2,273	471	1,598

SAMPLE PROGRAM SUMMARY REPORT IN EXCEL

The first total line represents totals of each column; the second line labeled "CB In-House Reports" are the totals we have from the year end reports submitted by your institution. The only programs that need to be reconciled against the year end reports are Private LEAP, TEG, State Nursing, TX Grant, TEOG, SLEAP and Texas College Work-Study.

				Unduplicated		Aggregate	Number Receiving	Aggregate Value Number			
Fice				Number Of Aid	Aggregate Cost	Family	Tuition Ex/	of Tuition Ex/	Receiving	Aggregate	
Institution	Code Ge	nder	Ethnic Group	Recipients	of Attendance	Contribution	Waiver	Waiver	Categorical Aid	Categorical Aid	
	123456 Ma	ıle	White, non-Hisp	115	2,862,433	736,202	1	8,232	35	197,468	
	123456 Ma	ıle	Black, non-Hisp	9	178,934	34,223	(0	5	19,547	
	123456 Ma	ıle	Hispanic	13	297,715	58,707	() 0	4	18,410	
	123456 Ma	le	Asian/Pac. Is.	23	600,210	80,649	(0	3	14,325	
	123456 Ma	le	Am. Ind/Alaskan	2	51,600	0	() 0	1	6,500	
	123456 Ma	le	Other	0	0	0	(0	0	0	
	123456 Ma	ıle	Unknown	0	0	0	() 0	0	0	
	123456 Fer	male	White, non-Hisp	128	2,966,348	637,245	() 0	34	145,277	
	123456 Fer	male	Black, non-Hisp	22	424,669	28,986	(0	5	22,664	
	123456 Fer	male	Hispanic	21	452,585	83,033	() 0	8	32,301	
	123456 Fer	male	Asian/Pac. Is.	29	753,764	241,333	(0	3	4,500	
	123456 Fer	male	Am. Ind/Alaskan	6	145,372	46,809	() 0	2	6,750	
	123456 Fer	male	Other	0	0	0	(0	0	0	
	123456 Fer	male	Unknown	0	0	0	() 0	0	0	
ABC COLLEGE			368	8,733,630	1,947,187	1	8,232	100	467,742		

CB IN-HOUSE REPORTS

Summary Con't

Institution	Fice Code	Gender	Ethnic Group	Number Receiving Pell Grant	Aggregate Valu	Number e Receiving SEOG		Aggregate Value of SEOG	Number Receiving One Campus TPE	of C	•	Number Receiving TEG	Aggregate Value of TEG
	123456	Male	White, non-Hisp	()	0	0	()	94	97,600	0	0
	123456	Male	Black, non-Hisp	()	0	0	()	5	3,850	0	0
	123456	Male	Hispanic	()	0	0	()	12	13,800	0	0
	123456	Male	Asian/Pac. Is.	()	0	0	()	23	26,000	0	0
	123456	Male	Am. Ind/Alaskan	()	0	0	()	2	3,000	0	0
	123456	Male	Other	()	0	0	()	0	0	0	0
	123456	Male	Unknown	()	0	0	()	0	0	0	0
	123456	Female	White, non-Hisp	()	0	0	() 1	80	102,400	0	0
	123456	Female	Black, non-Hisp	()	0	0	()	17	10,200	0	0
	123456	Female	Hispanic	()	0	0	()	17	17,600	0	0
	123456	Female	Asian/Pac. Is.	()	0	0	()	28	28,300	0	0
	123456	Female	Am. Ind/Alaskan	()	0	0	()	6	7,500	0	0
	123456	Female	Other	()	0	0	()	0	0	0	0
	123456	Female	Unknown	()	0	0	()	0	0	0	0
ABC COLLEGE			()	0	0	() 3	312	310,250	0	0	
CB IN-HOU	JSE REPO	RTS										0	0

Institution	Fice Code	Gender	Ethnic Group	Number Receiving LEAF		Number Receiving HB3015 ue Grants/Scholar hips	Aggregate Value of HB3015 S Grants/Scholar hips	Number	d Aggregate Val of Byrd Schol.	Number ue Receiving State Nurse Schol.	Aggregate Value of State Nurse Schol.
	123456 N		White, non-Hisp	()	0	0	0	0	0 (0
	123456	Male	Black, non-Hisp	()	0	0	0	0	0 (0
	123456	Male	Hispanic	()	0	0	0	0	0 () 0
	123456 ľ	Male	Asian/Pac. Is.	()	0	0	0	0	0 (0
	123456 N	Male	Am. Ind/Alaskan	()	0	0	0	0	0 (0
	123456 I	Male	Other	()	0	0	0	0	0 () 0
	123456 N	Male	Unknown	()	0	0	0	0	0 (0
	123456 F	Female	White, non-Hisp	()	0	0	0	0	0 (0
	123456 F	Female	Black, non-Hisp	()	0	0	0	0	0 (0
	123456 F	Female	Hispanic	()	0	0	0	0	0 () 0
	123456 F	Female	Asian/Pac. Is.	()	0	0	0	0	0 (0
	123456 F	Female	Am. Ind/Alaskan	()	0	0	0	0	0 () 0
	123456 F	Female	Other	()	0	0	0	0	0 (0
	123456 F	Female	Unknown	()	0	0	0	0	0 () 0
ABC COLL	.EGE			()	0	0	0	0	0 (0
CB IN-HOU	JSE REPOR	RTS		;	3 84	11					

Summary Con't

Institution	Fice Code	Gender	Ethnic Group	Number Receiving Deposit Schol.	Aggregate Value of Deposit Schol.		Aggregate Valur of Other Schol.		Aggregate Value of Tx Grant Scholarship	Unduplicated # ue Students Receiving TEOG Schol.	Aggregate Value of TEOG Scholarship	9
	123456	Male	White, non-Hisp	0) ()	0	0	0	0	0 ()
	123456	Male	Black, non-Hisp	0) ()	0	0	0	0	0 ()
	123456	Male	Hispanic	0) ()	0	0	0	0	0 ()
	123456	Male	Asian/Pac. Is.	0) (0	0	0	0	0 ()
	123456	Male	Am. Ind/Alaskan	0) ()	0	0	0	0	0 ()
	123456	Male	Other	0) ()	0	0	0	0	0 ()
	123456	Male	Unknown	0) ()	0	0	0	0	0 ()
<u>-</u>	123456	Female	White, non-Hisp	0) ()	0	0	0	0	0 ()
	123456	Female	Black, non-Hisp	0) ()	0	0	0	0	0 ()
	123456	Female	Hispanic	0) ()	0	0	0	0	0 ()
	123456	Female	Asian/Pac. Is.	0) ()	0	0	0	0	0 ()
	123456	Female	Am. Ind/Alaskan	0) ()	0	0	0	0	0 ()
	123456	Female	Other	0) ()	0	0	0	0	0 ()
	123456	Female	Unknown	0) ()	0	0	0	0	0 ()
ABC COLL	EGE			0) ()	0	0	0	0	0 ()
CB IN-HOL	JSE REPOF	RTS							0	0	0 ()

Institution	Fice Code	Gender	Ethnic Group	Unduplicated # Students Receiving SLEAP		Unduplicated # ue Students Receiving Grant & Schol.	Aggregate Val of Grant & Schol.	lue Number Receiving Federal Work Study		ue Number rk Receiving Texa Work Study	Aggregate Val as of Texas Work Study	
	123456	Male	White, non-Hisp		0	0	0	0	0	0	0	0
	123456	Male	Black, non-Hisp		0	0	0	0	0	0	0	0
	123456	Male	Hispanic		0	0	0	0	0	0	0	0
	123456	Male	Asian/Pac. Is.		0	0	0	0	0	0	0	0
	123456	Male	Am. Ind/Alaskan		0	0	0	0	0	0	0	0
	123456	Male	Other		0	0	0	0	0	0	0	0
	123456	Male	Unknown		0	0	0	0	0	0	0	0
	123456	Female	White, non-Hisp		0	0	0	0	0	0	0	0
	123456	Female	Black, non-Hisp		0	0	0	0	0	0	0	0
	123456	Female	Hispanic		0	0	0	0	0	0	0	0
	123456	Female	Asian/Pac. Is.		0	0	0	0	0	0	0	0
	123456	Female	Am. Ind/Alaskan		0	0	0	0	0	0	0	0
	123456	Female	Other		0	0	0	0	0	0	0	0
	123456	Female	Unknown		0	0	0	0	0	0	0	0
ABC COLL	EGE				0	0	0	0	0	0	0	0
CB IN-HOU	JSE REPOR	RTS			0	0					0	0

Summary Con't

			Number Receiving	Aggregate Val			Unduplicated a Students Receiving	Aggregate Val		
Institution	Fice Code Gend	er Ethnic Group	Institutional Work Study	of Institutional Work Study	Receiving AmeriCorps	Aggregate Val of AmeriCorps	lue HB3015 Work SStudy	of HB3015 Wo Study	ork Receiving Work Study	Aggregate Value of Work Study
	123456 Male	White, non-Hisp		0	0	0	0	0	0 (0
	123456 Male	Black, non-Hisp		0	0	0	0	0	0 (0
	123456 Male	Hispanic		0	0	0	0	0	0 (0
	123456 Male	Asian/Pac. Is.		0	0	0	0	0	0 (0
	123456 Male	Am. Ind/Alaskan		0	0	0	0	0	0 (0
	123456 Male	Other		0	0	0	0	0	0 (0
	123456 Male	Unknown		0	0	0	0	0	0 (0 0
	123456 Fema	ale White, non-Hisp		0	0	0	0	0	0 (0
	123456 Fema	ale Black, non-Hisp		0	0	0	0	0	0 (0
	123456 Fema	ale Hispanic		0	0	0	0	0	0 (0
	123456 Fema	ale Asian/Pac. Is.		0	0	0	0	0	0 (0
	123456 Fema	ale Am. Ind/Alaskan		0	0	0	0	0	0 (0
	123456 Fema	ale Other		0	0	0	0	0	0 (0
	123456 Fema	ale Unknown		0	0	0	0	0	0 (0
ABC COLI	_EGE			0	0	0	0	0	0 (0

	Fice		Number Receiving Subsidized	Aggregate Value of Subsidized	Number Receiving Unsub. Stafford	Aggregate Value of Unsub.	Number Receiving	Aggregate Value of Perkins	Number Receiving SLS/PLUS	Aggregate Value of SLS/PLUS
Institution	Code Gender	Ethnic Group	Stafford Loans	Stafford Loans	Loans	Stafford Loans	Perkins Loans	Loans	Loans	Loans
	123456 Male	White, non-Hisp	99	773,287	97	1,358,569	C) () C) 0
	123456 Male	Black, non-Hisp	8	57,747	9	80,479	C) () 0	0
	123456 Male	Hispanic	11	83,702	12	148,721	() (C	0
	123456 Male	Asian/Pac. Is.	22	187,000	18	289,856	() (C	0
	123456 Male	Am. Ind/Alaskan	2	17,000	2	25,100	() () C) 0
	123456 Male	Other	C	0	0	0	C) () C) 0
	123456 Male	Unknown	C	0	0	0	() () 0) 0
	123456 Female	White, non-Hisp	117	929,080	101	1,282,750	() () C) 0
	123456 Female	Black, non-Hisp	22	180,577	21	171,841	C) () 0	0
	123456 Female	Hispanic	19	146,144	16	187,385	C) () C) 0
	123456 Female	Asian/Pac. Is.	26	212,879	23	342,917	C) () 0	0
	123456 Female	Am. Ind/Alaskan	4	33,810	4	61,563	C) () C) 0
	123456 Female	Other	C	0	0	0	C) () 0) 0
	123456 Female	Unknown	C	0	0	0	() () 0) 0
ABC COLL	.EGE		330	2,621,226	303	3,949,181	() (C) 0

CB IN-HOUSE REPORTS

Summary Con't

					Number		Number			
			Number		Receiving	Aggregate Valu	ue Receiving	Aggregate Value	Э	
	Fice		Receiving HELP	Aggregate Value	e College Access	of College	Primary Care	of Primary Care	Number Receiving Income	
Institution	Code Ge	nder Ethnic Group	Loans	of HELP Loans	Loans	Access Loans	Loans	Loans	Contingent Loans	
	123456 Ma	le White, non-Hisp	0	() ()	0	0 (0	
	123456 Ma	le Black, non-Hisp	0	() ()	0	0 (0	ı
	123456 Ma	le Hispanic	0	() ()	0	0 (0	ì
	123456 Ma	le Asian/Pac. Is.	0	() ()	0	0 (0	ı
	123456 Ma	le Am. Ind/Alaskan	0	() ()	0	0 (0	
	123456 Ma	le Other	0	() ()	0	0 (0	
	123456 Ma	le Unknown	0	() ()	0	0 (0	_
	123456 Fei	male White, non-Hisp	0	() ()	0	0 (0	
	123456 Fer	male Black, non-Hisp	0	() ()	0	0 (0	ı
	123456 Fer	male Hispanic	0	() ()	0	0 (0	
	123456 Fer	male Asian/Pac. Is.	0	() ()	0	0 (0	ı
	123456 Fei	male Am. Ind/Alaskan	0	() ()	0	0 (0	
	123456 Fer	male Other	0	() ()	0	0 (0	ı
	123456 Fei	male Unknown	0	() ()	0	0 (0	
ABC COLL	.EGE		0	() ()	0	0 (0	

CB IN-HOUSE REPORTS

Institution	Fice Code	Gender	Ethnic Group	Number Receiving Subsidized Fed. Direct Loans	Aggregate Value of Subsidized Fed. Direct Loans	Number Receiving Othe Long Term Loans	er Aggregate Value of Othe Long Term Loans	r Number Receiving Unsub Fed. Direct Loans).
	123456	Male	White, non-Hisp	0	1	0	0	0	0
	123456	Male	Black, non-Hisp	0		0	0	0	0
	123456	Male	Hispanic	0	1	0	0	0	0
	123456	Male	Asian/Pac. Is.	0		0	0	0	0
	123456	Male	Am. Ind/Alaskan	0		0	0	0	0
	123456	Male	Other	0		0	0	0	0
	123456	Male	Unknown	0	1	0	0	0	0
	123456	Female	White, non-Hisp	0	1	0	0	0	0
	123456	Female	Black, non-Hisp	0		0	0	0	0
	123456	Female	Hispanic	O		0	0	0	0
	123456	Female	Asian/Pac. Is.	0	1	0	0	0	0
	123456	Female	Am. Ind/Alaskan	0	1	0	0	0	0
	123456	Female	Other	0		0	0	0	0
	123456	Female	Unknown	O		0	0	0	0
ABC COLL	.EGE			0	1	0	0	0	0

CB IN-HOUSE REPORTS

Summary Con't

Institution	Fice Code	Gender	Ethnic Group	Number Receiving BOT Loans	Aggregate Value of BOT Loans	Number Receiving HB3015 Loans	Aggregate Value of HB3015 Loans	e Unduplicated # Students Receiving Loans	Aggregate Value of All Loans		Aggregate Value of HB3015 Other
	123456	Male	White, non-Hisp	0	() () () 11	1 2,131,856	0	0
	123456	Male	Black, non-Hisp	0	() () ()	9 138,226	0	0
	123456	Male	Hispanic	0	() () () 1	2 232,423	0	0
	123456	Male	Asian/Pac. Is.	0	() () () 2	3 476,856	0	0
	123456	Male	Am. Ind/Alaskan	0	() () ()	2 42,100	0	0
	123456	Male	Other	0	() () ()	0	0	0
	123456	Male	Unknown	0	() () ()	0	0	0
	123456	Female	White, non-Hisp	0	() () () 12	3 2,211,830	0	0
	123456	Female	Black, non-Hisp	O	() () () 2	2 352,418	0	0
	123456	Female	Hispanic	O	() () () 2	1 333,529	0	0
	123456	Female	Asian/Pac. Is.	0	() () () 2	9 555,796	0	0
	123456	Female	Am. Ind/Alaskan	0	() () ()	5 95,373	0	0
	123456	Female	Other	0	() () ()	0	0	0
	123456	Female	Unknown	0	() () ()	0	0	0
ABC COLL	.EGE			0	() () (35	7 6,570,407	0	0

CB IN-HOUSE REPORTS

				Unduplicated #	Aggragata Valua	Number	Unduplicated #	Undunlicated #	
	Fice			Students Receiving Any	Aggregate Value of Funds	Unduplicated	Students Receiving	Unduplicated # Students	
Institution		ender	Ethnic Group	Aid	Awarded	Recipients	Grants	Receiving Schol.	TegNeed
	123456 Ma	ale	White, non-Hisp	115	2,435,156	. 114	108	0	0
	123456 Ma	ale	Black, non-Hisp	9	161,623	9	9	0	0
	123456 Ma	ale	Hispanic	13	264,633	13	13	0	0
	123456 Ma	ale	Asian/Pac. Is.	23	517,181	23	23	0	0
	123456 Ma	ale	Am. Ind/Alaskan	2	51,600	2	2	0	0
	123456 Ma	ale	Other	0	0	0	0	0	0
	123456 Ma	ale	Unknown	0	0	0	0	0	0
	123456 Fe	emale	White, non-Hisp	128	2,459,507	128	117	0	0
	123456 Fe	emale	Black, non-Hisp	22	385,282	22	20	0	0
	123456 Fe	emale	Hispanic	21	383,430	21	18	0	0
	123456 Fe	emale	Asian/Pac. Is.	29	588,596	29	28	0	0
	123456 Fe	emale	Am. Ind/Alaskan	6	109,623	6	6	0	0
	123456 Fe	emale	Other	0	0	0	0	0	0
	123456 Fe	emale	Unknown	0	0	0	0	0	0
ABC COL	LEGE			368	7,356,631	367	344	0	0

CB IN-HOUSE REPORTS

FORMULAS OF CALCULATIONS USED ON PROGRAM SUMMARY REPORT

Before coa or efc is used in calculations it is multiplied by enrollment adjustment percent (data element 35a and 35b).

Column Name	Formula used
Aggregate Cost of Attendance	Total of data element 27 (cost of attendance) * [data element 35a (enrollment adjustment percentage for COA) / 100]
Aggregate Family Contribution	Total of data element 28 (total family contribution) * [data element 35b (enrollment adjustment percentage for TFC) / 100]
Number Receiving Tuition Ex/Waiver	Number of records with data element 29 (Tuition Exemptions or Waivers or Fellowships) > 0
Aggregate Value of Tuition Ex/Waiver	Data element 29 total – Tuition Exemptions or Waivers or Fellowships
Number Receiving Categorical Aid	Number of records with data element 30 (Categorical Aid) > 0
Aggregate Categorical Aid	Data element 30 total – Categorical Aid
Number Receiving Pell Grant	Number of records with data element 31a > 0
Aggregate Value of Pell Grant	Data element 31a total – Federal Pell
Number Receiving SEOG	Number of records with data element 31b > 0
Aggregate Value of SEOG	data element 31b total – Federal SEOG (including match)
Number Receiving On-Campus TPEG	Number of records with data element 31c > 0
Aggregate Value of On-Campus TPEG	data element 31c total – TPEG (On-Campus)
Number Receiving TEG	Number of records with data element 31e > 0
Aggregate Value of TEG	data element 31e total – TEG (Private Schools ONLY)
Number Receiving LEAP	Number of records with data element 31f > 0
Aggregate Value of LEAP	data element 31f total – LEAP
Number Receiving HB3015 Grants and Scholarships	Number of records with data element 31g > 0
Aggregate Value of HB3015 Grants and Scholarships	data element 31g total – HB3015 Grants and Scholarships
Number Receiving Merit aid taken to Institution	Number of records with data element 31h > 0
Aggregate Value of Merit aid taken to Institution	data element 31h total – Merit aid to Institution
Number Receiving Merit aid by Institution	Number of records with data element 31i > 0
Aggregate Value of Merit aid by Institution	data element 31i total – Merit aid by Institution
Number Receiving Byrd Schol.	Number of records with data element 31j > 0
Aggregate Value of Byrd Schol.	data element 31j total – Byrd Scholarship
Number Receiving State Nurse Schol.	Number of records with data element 31k > 0
Aggregate Value of State Nurse Schol.	data element 31k total – State Nursing Scholarship
Number Receiving Deposit Schol.	Number of records with data element 31I > 0

Column Name	Formula used
Aggregate Value of Deposit Schol.	data element 31l total – Student Deposit Scholarship
Number Receiving Other Schol. & Grants	Number of records with data element 31n > 0
Aggregate Value of Other Schol. & Grants	data element 31n total – Other Scholarships or Grants
Number Receiving TX Grant Scholarship	Number of records with data element 310 > 0
Aggregate Value of Texas Grant Scholarship	data element 31o total – Texas Grant Program
Number Receiving TEOG	Number of records with data element 31p > 0
Aggregate Value of TEOG	data element 31p total – Texas Grant II Program
Number Receiving SLEAP	Number of records with data element 31q > 0
Aggregate Value of SLEAP	data element 31q total – SLEAP
Unduplicated # Students Receiving Grants & Schol.	Total number of records if any of the data elements 31a through 31q or data element 34a are > 0
Aggregate Value of Grants & Schol.	Total of data elements 31a through 31q or data element 34a
Number Receiving Federal Work-Study	Number of records with data element 32a > 0
Aggregate Value of Federal Work-Study	data element 32a total – Federal Work-Study (federal funds plus match)
Number Receiving Texas Work-Study	Number of records with data element 32b > 0
Aggregate Value of Texas Work-Study	data element 32b total – Texas Work-Study (state funds plus match)
Number Receiving Institutional Work- Study	Number of records with data element 32c > 0
Aggregate Value of Institutional Work- Study	data element 32c total – Need-based Institutional Work-Study
Number Receiving AmeriCorps	Number of records with data element 32d > 0
Aggregate Value of AmeriCorps	data element 32d total – AmeriCorps
Number Receiving HB3015 WS	Number of records with data element 32e > 0
Aggregate Value of HB3015 WS	data element 32e total – HB3015 WS
Unduplicated # Students Receiving Work-Study	Total number of records if any of the data elements 32a through 32e are > 0
Aggregate Value of Work-Study	Total of data elements 32a through 32e
Number Receiving Subsidized Stafford Loans	Number of records with data element 33a > 0
Aggregate Value of Subsidized Stafford Loans	data element 33a total – Subsidized Stafford Loans
Number Receiving Unsub. Stafford Loans	Number of records with data element 33b > 0
Aggregate Value of Unsub. Stafford Loans	data element 33b total – Unsubsidized Stafford Loans
Number Receiving Perkins Loans	Number of records with data element 33c > 0
Aggregate Value of Perkins Loans	data element 33c total – Perkins Loans

Column Name	Formula used
Number Receiving SLS/PLUS Loans	Number of records with data element 33d > 0
Aggregate Value of SLS/PLUS Loans	data element 33d total – Federal SLS + PLUS Loans
Number Receiving HELP Loans	Number of records data element 33e > 0
Aggregate Value of HELP Loans	data element 33e total – HELP Loans
Number Receiving College Access Loans	Number of records with data element 33f > 0
Aggregate Value of College Access Loans	data element 33f total – College Access Loan (CAL)
Number Receiving Primary Care Loans	Number of records with data element 33g > 0
Aggregate Value of Primary Care Loans	data element 33g total – Primary Care Student Loans
Number Receiving Income Contingent Loans	Number of records with data element 33h > 0
Aggregate Value of Income Contingent Loans	data element 33h total – Income Contingent Loans
Number Receiving Subsidized Fed. Direct Loans	Number of records with data element 33i > 0
Aggregate Value of Subsidized Fed. Direct Loans	data element 33i total – Subsidized Federal Direct
Number Receiving Other Long-Term Loans	Number of records with data element 33j > 0
Aggregate Value of Other Long-Term Loans	data element 33j total – Other Long-Term Loans
Number Receiving Unsub. Fed. Direct Loans	Number of records with data element 33k > 0
Aggregate Value of Unsub. Fed. Direct Loans	data element 33k total – Unsubsidized Federal Direct Loans
Number Receiving Be On Time (BOT) Loans	Number of records with data element 33l > 0
Aggregate Value of Be On Time (BOT) Loans	data element 33l total – Be On Time (BOT) Loans
Number Receiving HB 3015 Loans	Number of records with data element 33m > 0
Aggregate Value of HB3015 Loans	data element 33m total – HB3015 Loans
Unduplicated # Students Receiving Loans	Total number of records if any of the data elements 33a through 33m are > 0
Aggregate Value of All Loans	Total of data elements 33a through 33m
Number Receiving HB3015 Other Aid	Number of data element 34b > 0
Aggregate Value of HB3015 Other Aid	total of data element 34b – HB3015 Other Aid
Unduplicated # Students Receiving Any Aid	Total number of records if any of the date elements 29 through 34b are > 0
Aggregate Value of Funds Awarded	Total of date elements 29 through 34b
Number Unduplicated Recipients	Total number of records if any of fields 031 through 068 are > 0
Unduplicated # Students Receiving Grants	Total number of records if any of the data elements 29 through 31g or data elements 31o through 31q are > 0
Unduplicated # Students Receiving Schol.	Total number of records if any of the data elements 31h through 31n are > 0
TEGNeed	data element 27 (cost of attendance) minus data element 28 (total family contribution) minus data element 30 (categorical aid) minus data element 31a (federal pell) – this is ONLY for private senior, private jr and private health-related institutions.

APPENDICES

LOCATION CODES ISSUED BY CB

COUNTY CODES

<u>code</u>	county	<u>code</u>	county	<u>code</u>	county	<u>code</u>	county
001	ANDERSON	071	EL PASO	141	LAMPASAS	211	SHERMAN
002 003	ANDREWS ANGELINA	072 073	ERATH FALLS	142 143	LA SALLE LAVACA	212 213	SMITH SOMERVELL
003	ARANSAS	073 074	FANNIN	144	LEE	213 214	STARR
005	ARCHER	075	FAYETTE	145	LEON	215	STEPHENS
006	ARMSTRONG	075 076	FISHER	146	LIBERTY	216	STERLING
007	ATASCOSA	077	FLOYD	147	LIMESTONE	217	STONEWALL
800	AUSTIN	078	FOARD	148	LIPSCOMB	218	SUTTON
009	BAILEY	079	FORT BEND	149	LIVE OAK	219	SWISHER
010	BANDERA	080	FRANKLIN	150	LLANO	220	TARRANT
011	BASTROP	081	FREESTONE	151	LOVING	221	TAYLOR
012	BAYLOR	082	FRIO	152	LUBBOCK	222	TERRELL
013	BEE	083	GAINES	153	LYNN	223	TERRY
014	BELL	084	GALVESTON	154	MADISON	224	THROCKMORTON
015	BEXAR	085	GARZA	155	MARION	225	TITUS
016	BLANCO	086	GILLESPIE	156	MARTIN	226	TOM GREEN
017	BORDEN	087	GLASSCOCK	157	MASON	227	TRAVIS
018	BOSQUE	088 089	GOLIAD	158 150	MAYERICK	228	TRINITY
019 020	BOWIE BRAZORIA	099	GONZALES GRAY	159 160	MAVERICK MCCULLOCH	229 230	TYLER UPSHER
020	BRAZOS	090	GRAYSON	161	MCLENNAN	230	UPTON
022	BREWSTER	092	GREGG	162	MCMULLEN	232	UVALDE
023	BRISCOE	093	GRIMES	163	MEDINA	233	VAL VERDE
024	BROOKS	094	GUADALUPE	164	MENARD	234	VAN ZANDT
025	BROWN	095	HALE	165	MIDLAND	235	VICTORIA
026	BURLESON	096	HALL	166	MILAM	236	WALKER
027	BURNET	097	HAMILTON	167	MILLS	237	WALLER
028	CALDWELL	098	HANSFORD	168	MITCHELL	238	WARD
029	CALHOUN	099	HARDEMAN	169	MONTAGUE	239	WASHINGTON
030	CALLAHAN	100	HARDIN	170	MONTGOMERY	240	WEBB
031	CAMERON	101	HARRIS	171	MOORE	241	WHARTON
032	CAMP	102	HARRISON	172	MORRIS	242	WHEELER
033	CARSON	103	HARTLEY	173	MOTLEY	243	WICHITA
034	CASS	104	HASKELL	174	NACOGDOCHES	244	WILBARGER
035 036	CASTRO CHAMBERS	105 106	HAYS HEMPHILL	175 176	NAVARRO NEWTON	245 246	WALLACY WILLIAMSON
037	CHEROKEE	107	HENDERSON	176	NOLAN	246 247	WILSON
038	CHILDRESS	107	HIDALGO	177	NUECES	248	WINKLER
039	CLAY	109	HILL	179	OCHILTREE	249	WISE
040	COCHRAN	110	HOCKLEY	180	OLDHAM	250	WOOD
041	COKE	111	HOOD	181	ORANGE	251	YOAKUM
042	COLEMAN	112	HOPKINS	182	PALO PINTO	252	YOUNG
043	COLLIN	113	HOUSTON	183	PANOLA	253	ZAPATA
044	COLLINGSWORTH	114	HOWARD	184	PARKER	254	ZAVALA
045	COLORADO	115	HUDSPETH	185	PARMER		
046	COMAL	116	HUNT	186	PECOS		
047	COMANCHE	117	HUTCHINSON	187	POLK		
048	CONCHO	118	IRION	188	POTTER		
049	COOKE	119	JACK	189	PRESIDIO		
050 051	CORYELL COTTLE	120 121	JACKSON JASPER	190 191	RAINS RANDALL		
052	CRANE	121	JEFF DAVIS	192	REAGAN		
052	CROCKETT	123	JEFFERSON	193	REAL		
054	CROSBY	124	JIM HOGG	194	RED RIVER		
055	CULBERSON	125	JIM WELLS	195	REEVES		
056	DALLAM	126	JOHNSON	196	REFUGIO		
057	DALLAS	127	JONES	197	ROBERTS		
058	DAWSON	128	KARNES	198	ROBERTSON		
059	DEAF SMITH	129	KAUFMAN	199	ROCKWALL		
060	DELTA	130	KENDALL	200	RUNNELS		
061	DENTON	131	KENNEDY	201	RUSK		
062	DEWITT	132	KENT	202	SABINE		
063	DICKENS	133	KERR	203	SAN AUGUSTINE		
064	DIMMIT	134	KIMBLE	204	SAN JACINTO		
065	DONLEY	135	KING	205	SAN PATRICIO		
066	DUVAL FASTI AND	136	KINNEY	206	SAN SABA		
067 068	EASTLAND ECTOR	137 138	KLEBERG KNOX	207 208	SCHLEICHER SCURRY		
068 069	EDWARDS	138	LAMAR	208 209	SHACKLEFORD		
070	ELLIS	140	LAMB	209 210	SHELBY		
0.0		. 40		2.0			

FOREIGN COUNTRY CODES

Code	Name	Code	Name
401	Abu Dhabi	459	Coral Sea Islands
402	Afghanistan	460	Costa Rica
403	Albania	561	Cote Divoire (Ivory Coast)
404	Algeria	462	Croatia
409	Andorra	465	Cuba
406	Angola	470	Cyprus
411	Anguilla	476	Czech Republic
412	Antartica	471	Czechoslovakia
407	Antigua and Barbuda	472	Denmark
405	Argentina	473	Djibouti
408	Armenia	474	Dominica
413	Aruba	475	Dominican Republic
780	Ashmore & Cartier Islands	478	East Africa
410	Australia	480	Ecuador
415	Austria	481	Egypt (A.R.E)
414	Azerbaijan	485	El Salvador
419	Bahamas	490	England
418	Bahrain	482	Equatorial Guinea
416	Bangladesh	484	Eritrea
421	Barbados	491	Estonia
782	Bassas Da India	492	
428	Belarus	483	Ethiopa Europa Island
420 420		486	Falkland Islands
420 431	Belgium	487	Faroe Islands
423	Belize (British Honduras)		
	Benin	493	Fiji Finland
672	Benin (Republic of)	494 495	Finland
417	Bermuda		France
422 535	Bhutan	489	French Guiana
535	Bolivia	496 547	French Polynesia
424	Bosnia-Herzegovina	517	French Southern & Antarct
426	Botswana	497	Gabon Republic
783	Bouvet Island	498	Gambia The
430	Brazil	721	Gambia, The
784 705	British Indian Ocean Terr	501	Gaza Strip
785	British Virgin Islands	503	Georgia (C.I.S.)
432	British West Indies	500	Germany
427	Brunei Darussalam	499	Germany, (East)
433	Bulgaria	502	Ghana
739	Burkina Faso (Upper Volta)	504	Gibralter
434	Burundi	508	Glorioso Islands
436	Cambodia (Kampuchea)	505	Greece
437	Cameroon	506	Greenland
440	Canada	507	Grenada
441	Cape Verde	509	Guadeloupe
438	Cayman Islands	510	Guatemala
447	Central African Republic	512	Guernsey
444	Chad	671	Guinea
445	Chile	669	Guinea-Bissau
450	China, People=s Republic of	511	Guyana
452	Christmas Island	513	Haiti
453	Clipperton Island	514	Heard Island & McDonald
454	Cocos (Keeling) Islands	515	Honduras
455	Colombia	520	Hong Kong
456	Comoros	525	Hungary
457	Congo	528	Iceland
458	Cook Islands	530	India

FOREIGN COUNTRY CODES

Code	Name	Code	Name
535	Indonesia	620	Netherlands
540	Iran	621	Netherlands Antilles
545	Iraq	624	New Caledonia
550	Ireland	625	New Zealand
555	Israel	630	Nicaragua
560	Italy	636	Niger
562	Jamaica	635	Nigeria
563	Jan Mayen	637	Niue
565	Japan	638	Norfolk Island
567	Jersey	641	Northern Ireland
570	Jordan	640	Norway
571	Juan De Nova Island	643	Oman
572	Kazakhstan	799	Other Foreign
575	Kenya	645	Pakistan
577	Kiribati	650	Panama
577 579	Korea, (North)	651	Papua New Guinea
580	Korea, Republic of	653	Paracel Islands
585	Kuwait	655	Paraguay
578		660	Peru
576 590	Kyrgyzstan Laos	665	Philippines
590 592	Latvia	664	Pitcairn Islands
592 595	Lebanon	666	Poland
595 596	Lesotho	667	
598	Liberia		Portugal
		668	Portuguese E. Africa
600 507	Libya	670 673	Qatar Bayrian lalanda
597 503	Liechtenstein	673	Reunion Islands
593 500	Lithuania	677	Romania
599 604	Luxembourg	676	Russia
601	Macao	678	Rwanda
619	Macedonia	680	Ryukyu Islands
618	Madagascar	702	S. Georgia & S. Sandwich
606	Malagasy Republic	681	Saint Kitts & Nevis
602	Malawi (Central Africa)	688	San Marino
605	Malaysia	689	Sao Tome & Principe
763	Maldives	685	Saudi Arabia
609	Mali	690	Scotland
608	Malta	692	Senegal
764	Man. Isle of	697	Serbia
607	Martinique	691	Seychelles
603	Mauritania	686	Sierra Leone
604	Mauritius	693	Singapore
765	Mayotte	707	Slovakia
610	Mexico	698	Slovenia
612	Moldova	696	Solomon Islands
614	Monaco	694	Somalia
611	Mongolia	700	South Africa
622	Montenegro	695	Spain
766	Montserrat	699	Spratly Islands
613	Morocco	443	Sri Lanka (Ceylon)
617	Mozambique	682	St. Helena
435	Myanmar (Burma)	683	St. Lucia
616	Namibia	684	St. Pierre & Miquelon
623	Nauru	687	St. Vincent & The Grenadi
615	Nepal	703	Sudan

FOREIGN COUNTRY CODES

Code	Name	Code	<u>Name</u>
704	Suriname	<u> </u>	Itallic
708	Svalbard		
706	Swaziland		
705	Sweden		
710	Switzerland		
715	Syria		
451	Taiwan		
717	Tajikistan		
718	Tanzania		
720	Thailand		
722	Togo		
719	Tokelau		
723	Tonga		
724	Transkei		
725	Trinidad & Tobago		
727	Tromelin Island		
728	Tunisia		
730	Turkey		
731	Turkmenistan		
729	Turks & Caicos Islands		
716	Tuvalu		
732	Uganda		
733	Ukraine		
738	Union Sou. Soc. Rep.		
734	United Arab Emirates		
735	United Arab Republic		
736	United Kingdom		
740	Uruguay		
743	Uzbekistan		
744	Vanuatu		
745	Venezuela		
749	Viet Nam (North)		
750	Viet Nam (South)		
752	Wales		
756	Wallis & Futuna		
753	West Africa		
757	West Bank		
758	West Sahara		
754	Western Samoa		
701	Yemen		
755	Yemen (North)		
760	Yugoslavia		
770	Zaire		
771	Zambia		
772	Zimbabwe		
675	Zimbabwe (Rhodesia)		
	CB Documentation of		
	Inactive Codes:		
726			
751			

STATE CODES

Code	Name	Code	Name
310	Alabama	339	New Hampshire
311	Alaska	340	New Jersey
312	Arizona	341	New Mexico
313	Arkansas	342	New York
314	California	343	North Carolina
315	Colorado	344	North Dakota
316	Connecticut	345	Ohio
317	Delaware	346	Oklahoma
318	District of Columbia	347	Oregon
319	Florida	348	Pennsylvania
320	Georgia	349	Rhode Island
321	Hawaii	350	South Carolina
322	Idaho	351	South Dakota
323	Illinois	352	Tennessee
324	Indiana	354	Utah
325	lowa	355	Vermont
326	Kansas	356	Virginia
327	Kentucky	357	Washington
328	Louisiana	358	West Virginia
329	Maine	359	Wisconsin
330	Maryland	360	Wyoming
331	Massachusetts	362	Canal Zone
332	Michigan	363	Guam
333	Minnesota	364	Puerto Rico
334	Mississippi	365	Pacific Trust Territory
335	Missouri		(Outlying Area of U.S.)
336	Montana	366	Virgin Islands
337	Nebraska	368	American S
338	Nevada		



And

DON'T HESITATE TO CONTACT US!



