

Overview of BM1783J – IPEDS Reporting For Financial Aid

The SBCTC-ITD created a job that will extract most of the data needed to complete the IPEDS Part E – Scholarships and Fellowships portion of the IPEDS report. Job BM1783J (IPEDS Reporting for Financial Aid) replaces the DataExpress report created for last year's IPEDS reporting.

Because fee calculation waivers (the *W* waivers created by fee pay statuses applied in registration) are not awarded in Financial Aid, they are not included in the data extracted for this job. Colleges will need to run BM1719J (the Waiver Report) to get the dollar amounts for waivers and then add those amounts to the gross amount for Institutional Grants Unrestricted, as well as the line Discounts and Allowances Tuition and Fees, on the IPEDS report.

Job documentation for BM1783J is on the SBCTC-ITD Job Scheduling Index. The Business Office and the Financial Aid Office will need to determine the values to be entered in the job parameters. The job documentation contains definitions of the values to be entered in each parameter.

How the data is extracted for the BM1783 report:

- Financial Aid information is retrieved from the FAM database for all students with qualified (allowed) awards based on the values entered in the award and sub-award parameters. This establishes the pool of Financial Aid students who will be included.
- Discounts and allowance information is retrieved from the Customer Accounts database based on the values entered in the fee code and/or fee class parameters.
- Colleges may use either fee codes or fee classes, but not both for the same type of parameter.
- For example, if you enter fee codes in the “tuition and fee” parameters (BM1783-FEECD-TU1 and BM1783-FEECD-TU2), then you would not enter fee classes in the parameter (B1783-FEECLS-TU).
- If you enter fee classes in the “other fees” parameter (BM1783-FEECLS-OT), then you would not enter fee codes in the parameters (BM1783-FEECD-OT1 and BM1783-FEECD-OT2).
- The program matches payment data from the Customer Accounts database with award data from the Financial Aid (FAM) database.
 - If a student has a qualified award in FAM, but there are payments made by cash, check or charge in Customer Accounts, the program takes the amount used to pay for valid fee codes (based on fee codes or fee classes entered in the job parameters) up to the total award amount in FAM.
 - If the payment amount is less than the award amount, the program nets the difference.

- Sponsorship students (type O) are not included, because they are not reported to IPEDS.

BM1783J creates a work file, BM1783W.RUN, that contains the detail information by employee that is included on the summary report. DataExpress can be used to review this file. This file contains information for the most recent BM1783J that has been run.