Financial Aid Data System (FADS)

System Specifications

August 1, 2025

BOARD of REGENTS
STATE OF LOUISIANA

Memorandum to Users

August 1, 2025

- As of September 1, 2025, BOR is no longer accepting fixed-length submissions. See Appendix B for csv file layout.

September 16, 2024

- The following fields will no longer be collected and **should be left blank**:

    - FAFSA Received
    - Dependency Status
    - Parent's Contribution
    - Student's Contribution
    - Parent's Total Income
    - Student's Total Income

- Appendix F added for listing of prior memorandums.

System Specifications

Due Date: October 10 for Prior Financial Aid Year

Report Scope: Annual (Financial Aid Year) collection of financial aid "awards". This file should include all students receiving any form of identified financial aid **AND** all students with a valid "current" financial aid year FAFSA (see definitions).

Reporting Medium: The reporting medium will be via a web application. Users will be able to upload, edit, and view data with file format for data submission as follows:

> CSV (comma separated value) file format with the record layout specified in Appendix B of this documentation. This will accommodate converted Excel or Access data files.

Appendix C provides steps for converting an Excel file to a CSV file.

Introduction

The state constitution specifically requires that the Master Plan include a funding formula for state appropriations. However, the other key ingredients of a viable and effective postsecondary education finance policy are: (1) an appropriate tuition and fee policy; and (2) a complementary student financial assistance plan.

Recognizing this need, the Legislature, enacted Act 1105 of 2003, charging the Board of Regents with the development of a statewide tuition and fee policy, and Act 695 of 2004, requiring that Regents develop and maintain a comprehensive state student financial aid plan.

> ***Act 1105 of the 2003 Regular Session of the Louisiana Legislature:***
> *"The Board of Regents shall study and formulate a state tuition and fee policy which shall be applicable to each public postsecondary education institution and system in the state. The policy shall be developed in cooperation and consultation with each public postsecondary education management board. The Board of Regents shall take into consideration the cost of education provided by each type of institution, the proportion of such costs typically paid by students, the economic status of the citizens of the state of Louisiana, the overall rates of increase in public postsecondary education costs and tuition, the existing status of tuition and fees in Louisiana relative to its peer states, and other pertinent factors as may be determined by the Board of Regents after consultation with the postsecondary education management boards. The tuition and fee policy shall establish a framework for the imposition of student tuition and fees by the respective postsecondary education management boards. The delegation of authority to the postsecondary education management boards to establish tuition and fees in accordance with policies adopted by the Board of Regents pursuant hereto shall not be construed to authorize the Board of Regents to set a specific tuition or fee.*

> ***Act 695 of the 2004 Regular Session of the Louisiana Legislature:***
> *"The Board of Regents shall develop and maintain a comprehensive state student financial aid plan that supports the Master Plan for Public Postsecondary Education. In developing the plan, the board shall consider all sources of financial aid available to students attending or seeking to attend postsecondary education institutions in Louisiana and the financial needs of such students. The plan shall contain recommendations regarding student financial aid necessary to implement the policies and achieve the goals and objectives defined in the Master Plan for Public Postsecondary Education. Prior to the implementation of such recommendations, they shall be reviewed and approved by the Senate Committee on Education and the House Committee on Education."*

State policy for student charges and financial aid are important since a primary goal of the Master Plan is to increase opportunities for student access and success. Objectives in support of this goal focus on specific areas of identified need: (1) increasing participation in postsecondary education, particularly in under-represented groups of citizens, (2) ensuring that students progress and graduate with meaningful credentials, and (3) preparing citizens for the challenges of today's workforce needs.

In order to accomplish these objectives, it is necessary to create a set of coordinated state policies that:

- Provide adequate funding to the institutions -- the combination of state appropriations and tuition revenues must yield sufficient revenue for institutions to fulfill their differing missions.
- Result in tuition levels and programs of financial assistance that make the net cost of attendance at Louisiana colleges and universities affordable to the citizens of the state.

- Are sensitive to the fiscal realities/limitations of the state -- and ensure that the available state resources are utilized in the most effective way.
- Leverage federal financial aid programs to the greatest extent possible.
- Provide incentives for institutions to improve the performance of students.

The Board of Regents' staff has determined that in order to guide financial aid policy development, relevant and pertinent data are necessary to insure that policy meets the directed goals and objectives of the statute and align policy to insure that the cost of attendance is affordable to the citizens of the state. The Financial Aid Data System (FADS) will provide the data necessary to answer and analyze the following important financial aid policy questions:

1. What is the average net cost of attendance by institutional sector? Do these levels appear to be manageable to students with known income information?
2. How are federal financial aid programs interacting with state funded programs such as Louisiana Tuition Opportunity Program for Students (TOPS) and institutional waiver programs in meeting student's financial needs?
3. What is the level of unmet need for students by:
    a. Institutional sector?
    b. Students' need level?
    c. Academic preparation?
    d. Race/ethnicity?
    e. Geographic location?
4. How are institutional tuition waivers being utilized? What types of students are receiving them? Are they used differently by sector?
5. What portion of the institutionally awarded scholarships and waivers are going to instate versus out-of-state students?
6. How much of the state's total aid, including institutional scholarships and/or waivers, is being expended on:
    a. Students with identified financial need?
    b. Students without identified financial need?
    c. Students with special talents (e.g., athletes, musicians)?
7. How many students in each sector are paying the full cost of attendance without state or institutional scholarship and/or waiver support?
8. Are certain groups of students receiving a disproportionate amount of the state's total financial aid resources when institutional scholarships and/or waivers are combined with TOPS funds?
9. How does financial assistance impact student persistence (retention) behavior?
10. Does the financial profile appear to impact college choice in the state? In other words, do students from particular income levels gravitate towards certain institutions or sectors when academic preparation is held constant?

General Reporting Information

- Report data for the prior financial aid year. Award amounts should be based on what the student received and/or the amount that was waived by the institution, not necessarily what he/she was initially awarded. The amount received/waived should be net of any refunds.

- Each record of this file contains information for a unique student **enrolled** at your institution that:
  1. received some sort of financial aid "award" for the reporting financial aid year **OR**
  2. completed a "valid" FAFSA

  Include merit and need based aid as well as aid granted by discounting or waiving tuition, fees, room/board charges, etc.

- Report students (and applicable data) for the entire reporting financial aid year. For the purpose of this file submission, it does not matter if the student was enrolled in the leading or trailing summer.

- Any data reported from the FAFSA should come from a **valid** FAFSA (for the reporting financial aid year). If the student is not required to update and/or complete a FAFSA for each year that they are enrolled; and therefore the institution does not have a valid FAFSA, **the relevant FAFSA fields should be left blank.**

- Students that received aid may or may not have a valid FAFSA (for example continuing students receiving solely merit-based aid or athletic scholarships).

- Demographic and additional enrollment information for the students will be obtained by matching the students' social security number AND institution code to existing data files submitted by the institutions to the Board of Regents' Statewide Student Profile System (SSPS).

- Institutional award codes have been cross walked by campus staff to a four byte code dependent on the categorization of the following (see Appendix E for a more detailed description):

  1. Source of Funds:
     - Campus-based, Extra, Federal, Institution, State (TOPS or GO Grant), State (other Louisiana state aid), Outside
  2. Award Basis:
     - Need, Merit, Athletic, Other Talent (non-athletic) , Other
  3. Funding Status:
     - Funded, Un-Funded, Room/Board
  4. Award Type:
     - Gift, Loan, Work

- Campus-based aid - Financial aid programs that are administered by the institution. The federal government provides the institution with a fixed annual allocation, which is awarded by the financial aid administrator to deserving students. Such programs include the Perkins Loan, Supplemental Education Opportunity Grant and Federal Work-Study. Note that there is no guarantee that every eligible student will receive financial aid through these programs, because the awards are made from a fixed pool of money.

Definitions

Institution Code: A two-character code developed by the Board of Regents for Louisiana Institutions. The first character identifies the institutional system. This code provides for the state systems of colleges and universities and the classification of other traditional institutions. To permit an improved representation, the institution code in Appendix A includes a period to separate the system designation from the institutional designation. The code is processed, however, as a two-character code without periods.

Financial Aid Year Begin: Campuses should report the beginning of the financial aid reporting cycle, regardless of the term a student enrolls.

For example students enrolling for the spring 2005-2006 semesters would still be reported in the 2005 financial aid begin year.

Social Security Number: The number assigned to the student by the Social Security Administration

For those students not having a Social Security number (e.g. foreign students), campuses should report the same temporary number submitted to the Board of Regents' Statewide Student Profile System. This field will be the link to obtain demographic and enrollment information from existing Board of Regents' data collection systems**.**

Institution Common ID: Student ID other than the social security number. This field is included to assist the campus' editing process. If your college does not assign student ID's, insert the social security number (as reported previously).

Student Name: The format of the name fields are as shown in the record layout of this document and consists of Last Name, First Name and Middle Initial. Changes in student name status, like changes in Student Identification Number, should be forwarded to the Board of Regents.

Commuter Status: Indicate whether the student lives in the residence hall, or commutes (lives off campus). For purposes of this file submission, students living with their parents should be categorized as commuters. This status should be reported based on what was used in determining the student's financial aid/award package.

Annual Student Credit Hours Completed: The amount, to tenths, of the TOTAL annual credit hours (SCH) completed at the end of the financial aid reporting year. Actual credit earned should be reflected for variable credit courses. If a student does not complete any credit hours, this field should contain a "0". This field should not be left blank.

The CSV file format does not require leading zeros but does require decimal points (when applicable); therefore, the field would be coded 32.0.

Annual Student Contact Hours Completed: This is only for courses &/or programs taught in clock hours (i.e. Marine Training program). If the student does not earn clock hours, this field should contain a "0". This field should not be left blank.

The amount, to tenths, of the TOTAL annual clock hours (SCH) completed at the end of the financial aid reporting year. Actual clock hours earned should be reflected for courses with variable clock hours assigned to the course

The CSV file format does not require leading zeros but does require decimal points (when applicable); therefore, the field would be coded 925.0.

FAFSA Received by Institution (Valid FAFSA): This field should be left blank.

Cost of Attendance (COA) Budget: As reported on the valid FAFSA. (Also known as the cost of education or "budget") The total amount it should cost the student to go to school, including tuition and fees, room and board, allowances for books and supplies, transportation, and personal and incidental expenses. Loan fees, if applicable, may also be included in the COA. Child care and expenses for disabilities may also be included at the discretion of the financial aid administrator. Schools establish different standard budget amounts for students living on-campus and off-campus, married and unmarried students and in-state and out-of-state students. If the institution does not have a valid FAFSA, **this field should be left blank.**

Example of format for data field: Cost of attendance Budget of $12,000.00 would be coded as 12000.

Tuition Charged: For the purpose of this report, this field should include both the **annual** tuition and mandatory fees (fees charged to all students, not charges for specific majors or student specific fees) for the financial aid year. This amount should be net of any applicable refunds.

The CSV file format does not require leading zeros; therefore the field would be coded 6500.

Fee Residence: A student who is not assessed out-of-state fees will be considered a Louisiana resident. The determination of whether or not a student should pay out-of-state fees rests with the institution. (This data field should be used to report a student's residency for fee purposes only and may not necessarily represent his actual home residence.) Students who **are not assessed** out-of-state fees should be coded **Y**. Students who **are assessed** out-of-state fees should be coded **N**. This designation should be based on what was used in determining the student's financial aid package.

Room/Board Charges: As defined by the institution. This should be for the entire financial aid year. If there are no room/board charges assessed to the student, report $0 (0 for CSV).

The CSV file format does not require leading zeros; therefore the field would be coded 2525.

Other Charges: All other fees charged to the student not included in "tuition charged" and "room/board charges" for the entire financial aid year. If there are no "other" charges assessed to the student, report $0 (0 for CSV).

The CSV file format does not require leading zeros; therefore, the field would be coded 1500.

Dependency Status: **This field should be left blank.**

Parent's Contribution (PC): **This field should be left blank.**

Student's Contribution (SC): **This field should be left blank.**

Parent's Total Income: **This field should be left blank.**

Student's Total Income: **This field should be left blank.**

Institution Award Code: Report the institutions' code for classifying **any** financial aid "awarded" to a student. Campuses should include tuition and/or fee discounts/waivers, scholarships, grants, loans, etc. that the student receives. If the institution award code is less than 10 bytes, left justify the data field. Include as many awards as the student receives (up to a maximum of twelve).

This institution code will be cross-walked to a "common" categorization of all financial aid awarded by public postsecondary schools in Louisiana. Each institution has provided this crosswalk table to Regents and can continue to manage (i.e. add codes or make changes) to their respective FAD fund table via the web.

Award Amount: Report the associated annual net award the student received for each institution award code listed, **otherwise leave this field blank**.

The CSV file format does not require leading zeros; therefore, the field would be coded 2500.

Appendix A

BoR Institution Codes

See BOR Institution Codes

Appendix B

Comma Separated Value (CSV) File Layout

Data Element Name	Code or Source of Code	Field Format	Field Position	Field Length
Institution Code [INSTCODE]	Appendix A	Alpha-Numeric	1	2
Financial Aid Year Begin [FYEAR]	YYYY *see definitions*	Alpha-Numeric	2	4
Student Social Security Number [SSN]	9999999999	Alpha-Numeric	3	9
Institution Common ID [COMMONID]	See Definitions	Character/Text	4	20
Student Last Name [LNAME]		Character/Text	5	20
Student First Name [FNAME]		Character/Text	6	20
Student Middle Initial [MINIT]		Character/Text	7	1
Commuter Status [COMMUTER]	R,C	Character/Text	8	1
Annual Credit Hours Completed [CRDCMPL]	See Definitions	Numeric(4,1)	9	5
Annual Contact Hours Completed [CNTCMPL]	See Definitions	Numeric(5,1)	10	6
Not Used [USERDEF]	blank	Character/Text	11	20
Valid FAFSA Received by Inst [FAFSARCVD]	Y,N	Character/Text	12	1
Cost of Attendance Budget [BUDGET]	See Definitions	Numeric(5,0)	13	5
Tuition Charged [TUITION]	See Definitions	Numeric(5,0)	14	5
Fee Residence [INSTATE]	Y,N	Character/Text	15	1
Room/Board Charges [ROOMBD]	See Definitions	Numeric(5,0)	16	5
Other Charges [OTHRCHGS]	See Definitions	Numeric(5,0)	17	5
Dependency Status [DEPIND]	D,I	Character/Text	18	1
Parent's Contribution [PARENTCON]	See Definitions	Numeric(7,0)	19	7
Student's Contribution [STUDNTCON]	See Definitions	Numeric(7,0)	20	7
Parent's Total Income [PTI]	See Definitions	Numeric(7,0)	21	7
Student's Total Income [STI]	See Definitions	Numeric(7,0)	22	7
Institution Award Code1 [AWDCDE01]	See Definitions	Alpha-Numeric	23	10
Award Amount1 [AWDAMT01]	See Definitions	Numeric(5,0)	24	5
Institution Award Code2 [AWDCDE02]	Repeat positions 23 - 24 for any subsequent awards, leave **blank** if none	Alpha-Numeric	25	10
Award Amount2 [AWDAMT02]		Numeric(5,0)	26	5
Institution Award Code3 [AWDCDE03]		Alpha-Numeric	27	10
Award Amount3 [AWDAMT03]		Numeric(5,0)	28	5
Institution Award Code [AWDCDE04]		Alpha-Numeric	29	10
Award Amount [AWDAMT04]		Numeric(5,0)	30	5
Institution Award Code [AWDCDE05]		Alpha-Numeric	31	10
Award Amount [AWDAMT05]		Numeric(5,0)	32	5
Institution Award Code [AWDCDE06]		Alpha-Numeric	33	10
Award Amount [AWDAMT06]		Numeric(5,0)	34	5
Institution Award Code [AWDCDE07]		Alpha-Numeric	35	10
Award Amount [AWDAMT07]		Numeric(5,0)	36	5
Institution Award Code [AWDCDE08]		Alpha-Numeric	37	10
Award Amount [AWDAMT08]		Numeric(5,0)	38	5
Institution Award Code [AWDCDE09]		Alpha-Numeric	39	10
Award Amount [AWDAMT09]		Numeric(5,0)	40	5
Institution Award Code [AWDCDE10]		Alpha-Numeric	41	10
Award Amount [AWDAMT10]		Numeric(5,0)	42	5
Institution Award Code [AWDCDE11]		Alpha-Numeric	43	10
Award Amount [AWDAMT11]		Numeric(5,0)	44	5
Institution Award Code [AWDCDE12]		Alpha-Numeric	45	10
Award Amount [AWDAMT12]		Numeric(5,0)	46	5
Blank[FILLER]	blank	Alpha-Numeric	47	15

Note the field length is the maximum allowable for the field. Leading and trailing zero's are not required.

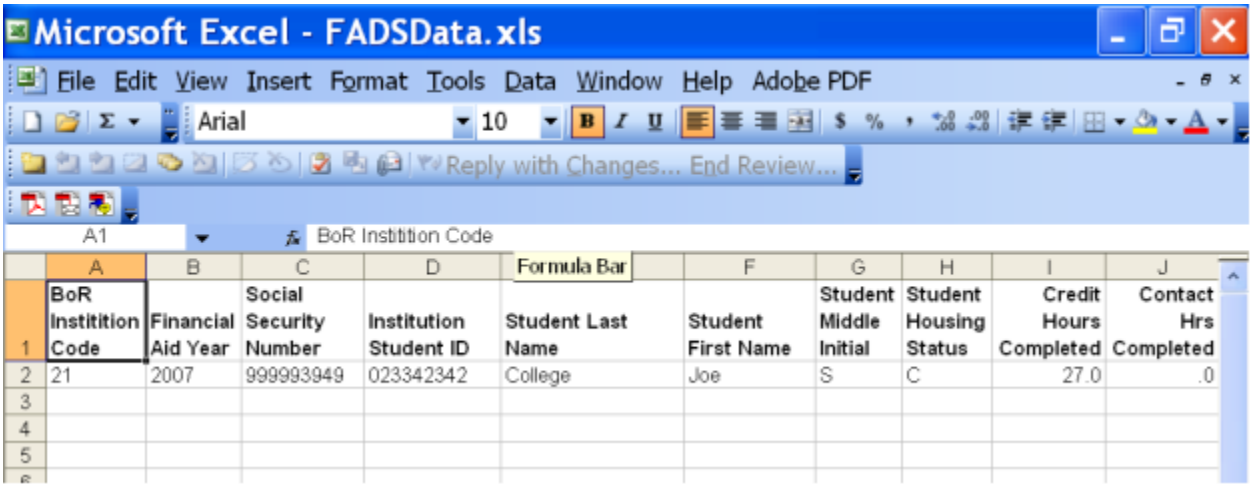
Appendix C

Converting Excel Template to CSV File

CSV, or comma-separated-values, files are native Excel file formats. That is, Excel can open and read them without any special converters. To create a CSV file from a "native" Excel file:

1) **Step One** – Open the Excel worksheet and insure that all fields have been entered and formatted correctly. Save the spreadsheet in "XLS" format prior to creating the CSV file. The following is an example "XLS" Excel spreadsheet [see Figure 1].

Figure 1



2) **Step Two** – From the File menu, choose Save As and change the type to CSV and provide a unique name for the CSV file [see Figure(s) 2, 3].

Figure 2

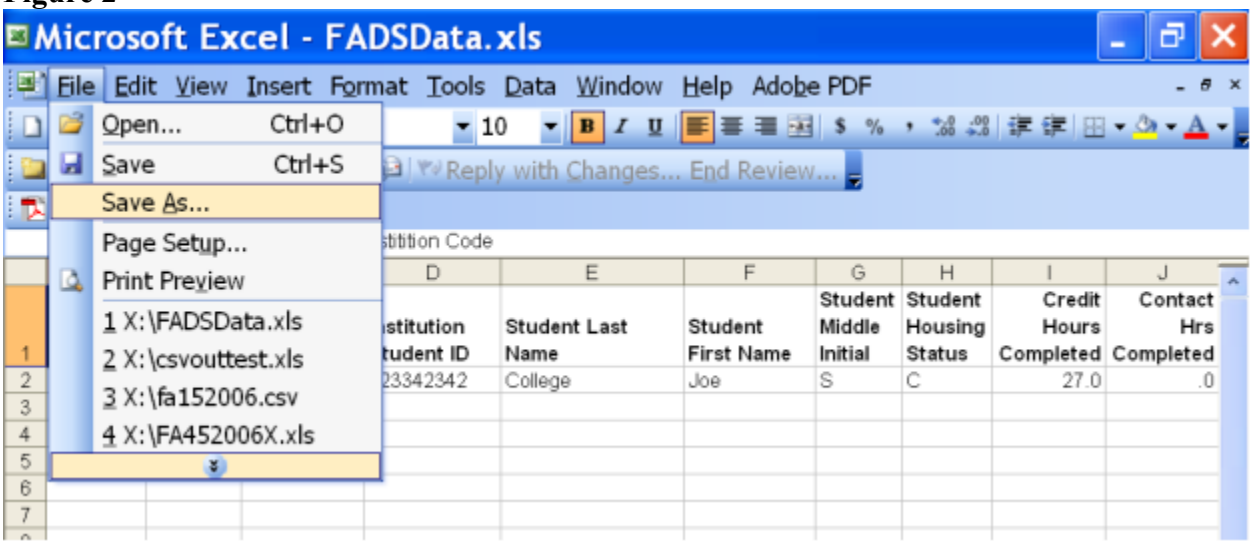
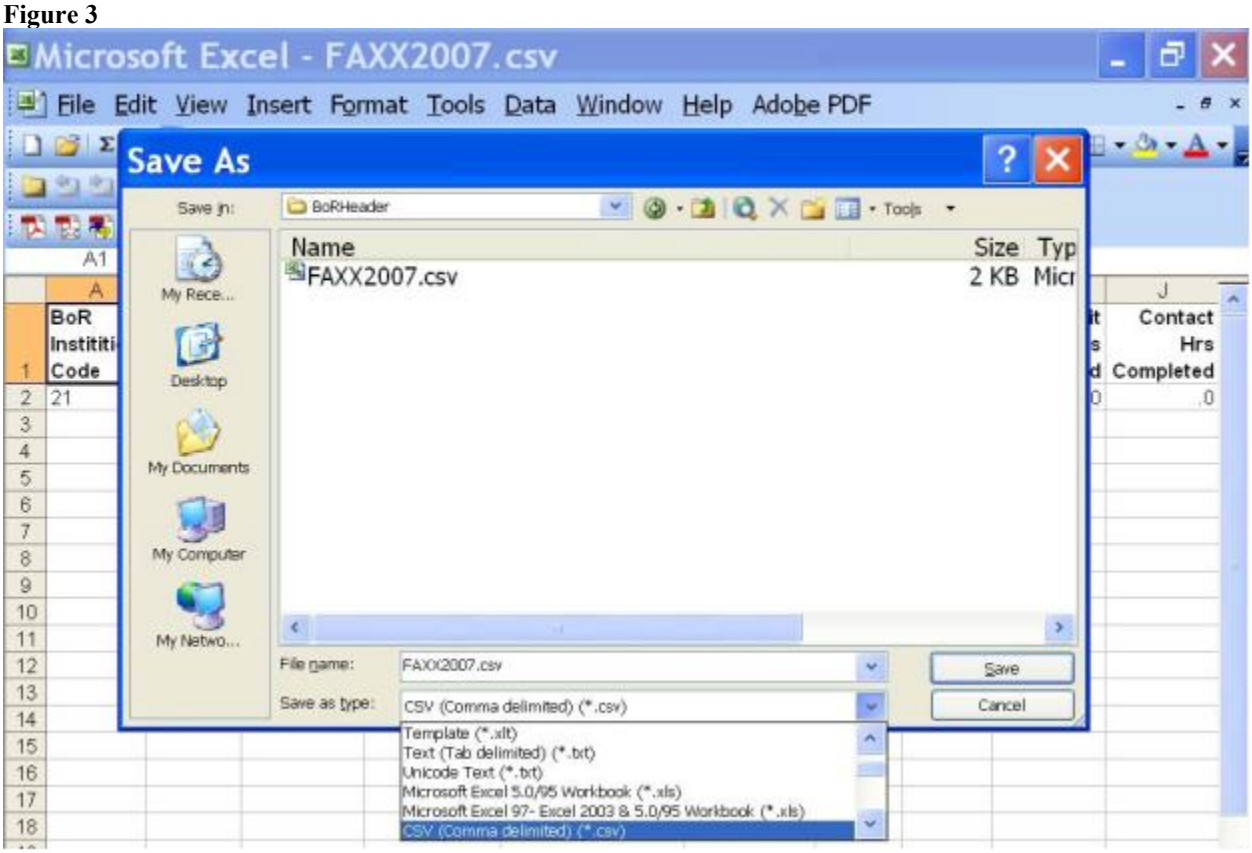
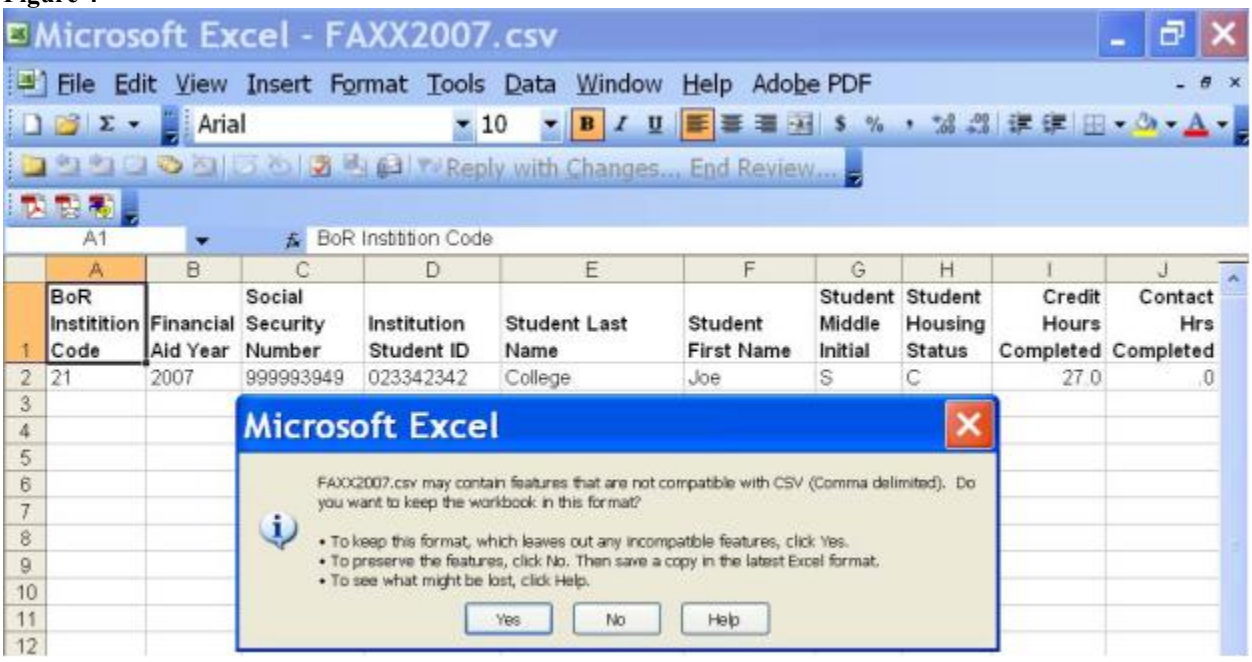


Figure 3



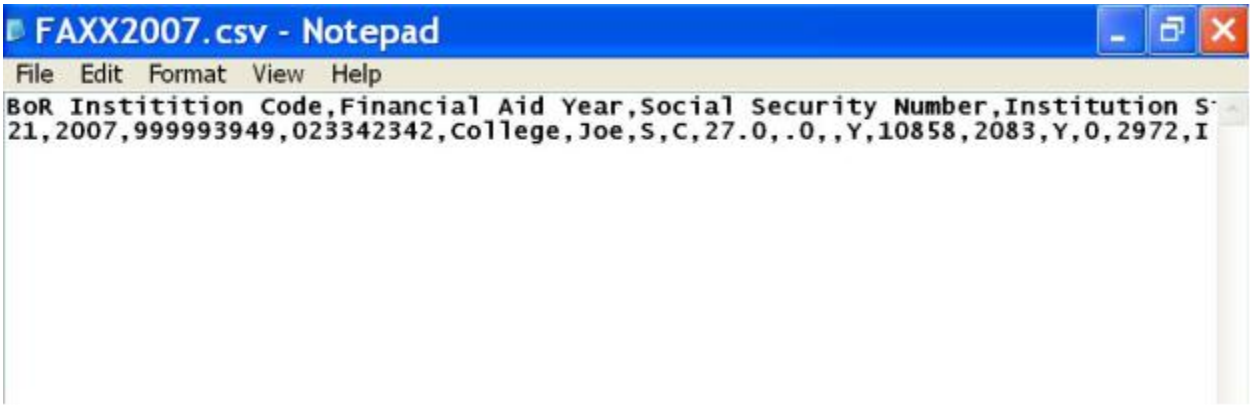
3) **Step Three** – Excel will give you a warning message that some of the features cannot be saved. Since CSV is a text-only format [*you only get the raw formatted data when using this method*], you can acknowledge the message by clicking [Yes] *[see Figure 4]*.

Figure 4



4) **Step Four** – The CSV file should look similar to the one shown below. [*You can open the CSV file with a text-editor such as Notepad and view/verify the file, see Figure 5*].

Figure 5



Appendix D

Web Application Screenshots

See the Financial Aid Data Study User Guide

Appendix E

Financial Aid Data System Fund Codes

Financial Aid Data System Award Code Table Lookup

The award code table used by FADS is based on the new coding scheme used in Noel-Levitz Enrollment and Revenue Management System (ERMS). Several modifications have been made to the Noel-Levitz system, however, to allow for summarization of data in a manner needed by the Board of Regents.

The award code lookup table is absolutely critical. The analysis cannot be run without it. The table enables us to interpret your award code, determine the type and sources of funds involved, and classify the funds accordingly. It is essential that it be complete, accurate, and current. If awards are miscoded, we will draw incorrect conclusions about the manner in which funds are being used at the institution and the extent to which your students are being adequately aided.

When entering your institutional codes in student records, note that the codes cannot exceed 10 characters in length.

Fund Type Codes

Each Institutional Award Code that appears in a student record must have a Fund Type Code associated with it. The Fund Type Code is a four-position code that is interpreted as shown below. You must define each award code by Fund Type in the Award table.

Position 1 **Source**	**Position 2** **Basis**	**Position 3** **Funding**	**Position 4** **Award Type**
I = Institutional	T = Athletic	F = Funded	W = Work
C = Campus-Based Government	M = Merit-Based (Academic)	U = Unfunded (Tuition Source)	L = Loan
F = Federal Government	P = non-athletic talent-based	R = Unfunded (Room and Board Source)	G = Gift
S = TOPS, GO Grant	N = Need-Based		B = Employee Benefit
P = Other Louisiana State aid	O = Other (County, Honeywell employee)		
O = Outside and other states			
E = Extra			

Source Code (Position 1): The alpha entry for this position is determined by the point of origin or sponsor of the fund being entered.

Alpha Entry	Description
I	*Institutional* includes both endowed and unfunded (explained later) institutional programs. The identifying characteristic for Institutional source codes is that award control is with the institution, even if the award is endowed. If the institution is not aware of the award before the student brings it with him/her to campus, then the award source should be coded as outside.
C	*Campus-Based Government* includes the federal campus-based programs (SEOG, Perkins Loan, and Work Study) and any other government-funded aid where the campus gets a fixed allocation of funds.
F	*Federal Government* includes Pell Grants, Stafford and Direct Loans, for which the funds follow the students and there is not a fixed allocation to the institution.
S	*State* – used only for TOPS and Go Grant
P	Other State of Louisiana financial aid
O	*Outside* includes privately funded programs such as those offered by foundations and service clubs. It also includes aid that students receive from parishes and from state governments other than Louisiana
E	*Extra* includes supplemental sources of funding, such as unsubsidized and alternative loans, PLUS, employee dependent benefits, and tuition exchange programs.

Basis Code (Position 2): The alpha entry for this position is determined by the criteria used to determine student eligibility for this fund. The Basis codes are listed in hierarchical order. For example, if a merit-based award also requires financial need, it is given an "M" source code.

Alpha Entry	Description
T	*Talent-Based* in this case includes only athletic and related scholarships. Athletic, athletic trainer, cheerleading and similar awards should be included.
P	This category is used to identify awards that are based on talent (e.g., music, art, dance) other than athletic-related awards. Student government and other leadership awards should be included here.
M	*Merit-Based* includes any award for which academics is the criterion even if financial need is also a criterion.
N	*Need-Based* includes awards for which financial need is the criterion.
O	*Other* includes awards that do not fall under any of the basis codes described above. They may include corporate awards or awards of circumstance (e.g., students from a particular parish or high school).

Funding Code (Position 3): The alpha entry for this position is determined by whether an award creates or reduces revenue.

Alpha Entry	Description
F	*Funded* awards are those for which real dollars exist, such as endowed awards, government programs, outside awards, etc. Funded awards are typically not part of the institution's general operating budget.
U	*Unfunded (Tuition Source)* includes award programs that represent a tuition discount. Unfunded tuition source awards are normally part of the institution's operating budget either as an expense or a tuition revenue reduction.
R	*Unfunded (Room and Board Source)* included award programs that represent a discount from normal room and board charges, such as room grants. Unfunded room/board source awards are part of the residence halls operating budget. If an award is specified for room/board expenses but is part of the general operating budget, it should be classified as a tuition source award.

Award Type Code (Position 4): The alpha entry for this position qualifies the terms or student obligations upon receipt of this award.

Alpha Entry	Description
W	*Work* includes awards for which the recipient is expected to perform certain tasks at the conclusion of which compensation will be paid.
L	*Loan* includes awards for which recipients have repayment expectations even if cancellation provisions exist.
G	*Gift* includes awards which do not contain any repayment obligations.
B	*Benefit* identifies tuition benefits and waivers that are available to employees and/or their dependents.

Sample Fund Types

Fund Type	Award Description
SMFG	TOPS (Note: The SMFG fund type is used only for TOPS awards.)
SNFG	Go Grant
PNFG	State of Louisiana need-based award (other than Go Grant)
POFG	State of Louisiana gift award based on other criteria
FNFG	Pell Grant
IMUG	Institutional academic scholarship from operating budget
IMFG	Endowed institutional academic scholarship
IPUG	Music, Art, or other non-athletic-related talent-based scholarship from operating budget. Institutional ROTC awards may be included here.
INUG	Institutional need-based grant from operating budget
ITUG	Institutional athletic-related scholarship from operating budget
ITFG	Institutional endowed athletic-related scholarship
IORG	Institutional room grant from residence halls budget that is not based on need or academics (e.g., for RA)
CNFG	Federal SEOG
CNFW	Federal Work Study
CNFL	Federal Perkins Loan
OMFG	State of Mississippi (or AL or TX or …) merit-based gift award
OMFG	Elks Leadership Scholarship, Parish Scholarship, etc.
EOFL	PLUS, or unsubsidized Stafford, Direct, or health professions loans or alternative loans
EOUB	Employee or employee dependent tuition waiver
EOUG	Tuition waivers for dependents of employees from other institutions

Appendix F

Previous Memorandums

September 15, 2008

Student level financial aid data should be reported by public postsecondary institutions through the Financial Aid Data System (FADS). The collection cycle will open on October 10, 2008 and remain open for 2 weeks. Appendix D of this document contains step by step instructions regarding this file submission. Additional student level data previously submitted to Regents by the institutions via Statewide Student Profile System (SSPS) for the academic year 2007-08 will be appended to this file to capture additional demographic factors for the students.

In order to compile summary information by award types, the award information will also be cross walked to the fund code tags as designated in each institution's FAD fund table, which can also be managed via the web. Appendix E provides instructions regarding how the tags should be determined.