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March 27, 2014

TO: Financial Aid Directors
Texas Public and Independent Institutions of Higher Education

FROM: Arturo Alonzo, Jr., Ed.D., Deputy Commissioner for Finance and Administration/Chief Operating Officer

SUBJECT: Financial Aid Database (FADS) Report Changes for the FY2014 Report

This memo is to advise you of two changes to be made to the Financial Aid Database (FADS) report to be submitted in fall 2014.

Addition of a 9-Month Expected Family Contribution (EFC) Field

To accommodate new allocation methodologies developed by the Work-Study and Texas Educational Opportunity Grant Negotiated Rulemaking Committees, we must collect 9-month EFC numbers for all persons completing FAFSAs or TASFAs. Although we have an EFC field in the FADS now, instructions are to report EFCs for the period in which the student received aid – not for a specific length of time. For consistency, we must collect the 9-month data. When the FY2014 data is submitted in fall 2014, there will be a new field for 9-month EFCs. Field 21 of the FADS report, currently a 53-digit filler field, will be split into two fields:

- New field 21a will be a 6-digit numeric field for collecting the 9-month EFC; and
- New filler field 21b will be a 47-digits filler field.

Matching FADS to the CBM001

The FADS report will continue to be matched to the CBM001. As in the past, any student record in FADS that is designated an affidavit (1403) student will generate an error if the student's identification number is not found in the CBM001. The same will be true for any student record in FADS that does not identify a student as an affidavit student if he/she has that designation in the CBM001 report. These errors will have to be resolved before the institution may certify its FADS report.

Other students whose FADS identification numbers are not located in the CBM001 will generate warnings and institutions will be encouraged to investigate these situations, but will not have to resolve the warnings in order to certify their FADS reports. This change is being made in recognition that there are populations of students eligible for financial aid who are not reported in the CBM001.

Please note that the use of warnings for non-affidavit student records that do not match is a **trial change**. The numbers of such students will be monitored. If the numbers grow disproportionately and/or there is concern that aid offices and registrars are not continuing to coordinate their use of student IDs, the required resolution of all non-matching records will be reinstated. It is critical that institutions be consistent in their use of student identification numbers. Your one-year persistence rates and graduation rates, as well as financial aid program persist and graduation rates rely on being able to track students over time.

These changes will be included when the FY2014 FADS Manual is sent out, but we wanted to give you advance notice and more time to accommodate them.

If you have any questions, please contact Jane Caldwell at jane.caldwell@thecb.state.tx.us.

cc: Presidents and Chancellors
Carol McDonald