



STUDENT FINANCIAL AID DATA COLLECTION

Quick Reference Guide

WHO SHOULD USE THIS DATA COLLECTION?

Anyone who needs to use the data from the **Student Aid Management (SAM) System**, for operational support or institutional analysis, for things such as:

- Financial Aid amounts awarded
- Aid programs/ categories used at Penn
- Admissions data related to financial aid, such as other schools the student applied to, and some information about their borrowing history prior to Penn

WHAT TYPES OF BUSINESS QUESTIONS CAN I ANSWER USING THE STUDENT FINANCIAL AID COLLECTION?

There are a great many business questions that can be addressed using the student financial aid data collection, from the simple to the complex. For example:

- How many incoming freshmen received financial aid?
- What are the total aid amounts being awarded to Penn Grant recipients?
- Have financial aid awards changed over the past 5 years, and if so, in what subcodes (aid categories)?

COLLECTION DESCRIPTION

- Data refreshed weeknights, Monday through Friday, from the **Student Aid Management (SAM) System**.
- Includes from Fiscal Year 2011 forward; the data loads began in early spring of 2011.
- Table and column descriptions: <https://www.isc.upenn.edu/student-financial-aid-data-collection#Tables-and-Data-Elements>

DATA INCLUDED IN THE STUDENT FINANCIAL AID DATA COLLECTION

- **Financial Aid Universe** – Includes tables that have the detail application and award data, student biographic data, and information about aid programs.
- **Financial Aid – SRFS Use Only Universe** – Separate tables in the data warehouse contain confidential information, such as the parent's financial data from the FAFSA. These additional tables are included in a separate universe for SRFS use only. Please contact the Office of Student Financial Services if you believe you have a business need to query the confidential financial aid information: <http://www.sfs.upenn.edu/contacts/index.htm>

STUDENT FINANCIAL AID DATA QUALITY ADVISORIES

All data corrections must be done in the source system, so that the corrected information can flow to the warehouse in the next load. If you find something that you feel is incorrect, please report it to Data Administration for investigation. If it is truly a data problem, it will need to be passed to the University Registrar for correction in SRS.

The record key in SAM is still based on Social Security Number, but in the warehouse, PennID is used for reporting and the Business Objects universes join the tables using PennID. For students who do not yet have a PennID assigned, the warehouse will use a temporary "warehouse only" number in the PennID column – PennIDs starting with zero should not be considered real, and should not be used in any other



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context except for joining tables in the warehouse. Furthermore, it is possible for an individual to have data in SAM associated with two different SSNs, causing duplicates to come to the warehouse for such persons. In these cases, you will see rows in the warehouse with identical PennIDs but different SSNs.

ADDITIONAL DATA COLLECTION INFORMATION

- Access form at <http://provider.www.upenn.edu/computing/da/eforms/> Do not check the “all data plus confidential income information” box on the form, unless you have first cleared it with the Office of Student Financial Aid.
- Because queries often involve related SRS data, users of the **Student Financial Aid Data Collection** are strongly advised to also get access to the Student Data Collection.
- Pre-requisite training for the **Student Data Collection**:
 - **Knowledge Link** – Login required. “[SRS Overview and Student Screens](#)” (Instructor led)
 - **Knowledge Link** – Login required. “[Using the Student Data Collection in the Data Warehouse](#)”

FOR ADDITIONAL HELP WITH THIS DATA COLLECTION

- Send email to sfa-wh@lists.upenn.edu This is a monitored list; subscription is automatic for people who obtain access to the **Student Financial Aid Data Collection**.

OR

- Send email to da-staff@isc.upenn.edu (Enterprise Information & Analytics staff)