

Oracle Fusion Cloud Student Financial Planning

How do I structure a SAFI message?

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Contents

Get Help	i
<hr/>	
1 Introduction	1
Introduction	1
2 SAFI Message Field Mapping	3
SAFI Message Field Mapping	3
3 Student Element	5
Student Element	5
4 Program Element	7
Program Element	7
5 Program Length Element	21
Program Length Element	21
6 Transfer Information Element	23
Transfer Information Element	23
7 Academic Year Definition Element	25
Academic Year Definition Element	25
8 Term Element	27
Term Element	27
9 Academic Year Element	29
Academic Year Element	29

10	Term Periods Element	31
	Term Periods Element	31
11	Summer Element	35
	Summer Element	35
12	Course Element	39
	Course Element	39
13	Charge Information Element	47
	Charge Information Element	47
14	Adjustment Element	51
	Adjustment Element	51
15	Student Resource Element	53
	Student Resource Element	53
16	Credit Balance Element	57
	Credit Balance Element	57
17	Refund Element	59
	Refund Element	59
18	Client Message Element	61
	Client Message Element	61

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1 Introduction

This resource provides updated guidance on structuring and transmitting the student academic and financial information (SAFI) message to Oracle Student Financial Planning.

It explains the hierarchy of SAFI data elements—from student and program details to courses, charges, resources, and refunds—and how each element affects financial aid processing. Use it as a comprehensive reference to support compliance and ensure accurate enrollment, packaging, disbursement, and reconciliation.

2 SAFI Message Field Mapping

Here's a high-level view of the student academic and financial information message structure.

```
Student Element
  Program Element (1:M)
  Program Length Element (1:1)
  AYD Element (1:1)
  Transfer Element (0:M)
  SAP Element (0:1)
  Term Element (0:M)
  Academic Years Element (0:M)
  Term Periods Element (1:M)
  Charge Element (0:M)
  Adjustment Element (0:M)
  Summer Terms (0:1)
  Term Periods Element (1:M)
  BBAY Term Element (0:1)
  Term Periods Element (1:M)
  Course Element (1:M)
  Scheduled Instruction Element (1:M)
  Student Resources Element (0:M)
  Charge Element (0:M)
  Adjustment Element (0:M)
  Charge Element (0:M)
  Adjustment Element (0:M)
  Student Resources Element (0:M)
  Credit Balance Element (0:M)
  Refund Element (0:M)
  Charge Element (0:M)
  Adjustment Element (0:M)
  Unspecified Program Element (0:M)
  Course Element (1:M)
  Scheduled Instruction Element (1:M)
  Student Resources Element (0:M)
  Charge Element (0:M)
  Adjustment Element (0:M)
  Student Resources Element (0:M)
  Client Message Element (0:M)
```


3 Student Element

Captures the essential student identification information necessary to match incoming data to the correct student in Oracle Student Financial Planning.

Required Element? Yes

Can Repeat? No

Field: External Student ID

Description: Unique student identifier used to link student academic and financial information message to impacted student.

Impact on Financial Aid Processing: If matched to existing student record a new package will be triggered. If not matched, the message will be discarded and will need to be reloaded once student record exists.

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
627654	Nonblank string	Yes	Any string	Yes <code>getExternalStudent</code>	<ul style="list-style-type: none">• Student Summary• Self Service

4 Program Element

Defines all details about a student's academic program, including program code, description, type, college, dates, and status.

Required Element? Yes

Can Repeat? No

Best Practices:

- Ensure your school has a tested plan to manage enrollment changes in Oracle Student Financial Planning (SFP) before going active.
- Have a clear strategy for using packaging start dates versus program start dates when starting financial aid packages in SFP.

Field: Program Code

Description: Unique identifier for the program. A change in this code indicates the student is entering a new program, requiring a new enrollment and financial aid package.

Impact on Financial Aid Processing: A new enrollment will create regardless of the current program's enrollment status.

A new program code should only be sent if the student is entering a new degree level that impacts the student's award amounts. If the new program overlaps the prior program, the student should be withdrawn or graduated in the prior program to ensure correct packaging.

Current SFP logic doesn't automate packaging overlapping funding across dual enrollments. Schools should ensure terms that overlaps don't have course, enrollment data, or a cost of attendance configured in both enrollments to prevent financial aid from being packaged inaccurately.

It's recommended to use the enrollment data report to identify concurrent enrollments with overlapping funding.

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
BSSOM	Nonblank string	Yes	Any string Student Academic and Financial Information (SAFI) message can only contain one program within the 'Program' tag	Yes getCode()	<ul style="list-style-type: none"> • Student Summary • Packaging • Program Information • Enrollment Information • Satisfactory Academic Progress (SAP) Information

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
					<ul style="list-style-type: none"> Disbursing Return to Title IV (R2T4) Information Credit Balance

Field: Description

Description: Schools typically use this field to describe more specifically what the student is studying. For example, display the program name and each major the student has declared.

Impact on Financial Aid Processing: Description isn't used to decide when a new enrollment is created in packaging, but can be used within configuration and is viewable to the student in Self Service.

If a school offers multiple programs within the same degree/career level, this field can be used to identify the specific program/plan/major that the student is attending. This will allow you to send in the same program code to prevent new enrollments from being created unnecessarily when a student is changing programs at the same degree level.

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
BSSOM Accounting and Information Systems	Nonblank string	Yes	Any string	Yes getDescription()	<ul style="list-style-type: none"> Student Summary Packaging Program Information Enrollment Information SAP Information Disbursing R2T4 Information Credit Balance Self Service

Field: External Program ID

Description: A unique Identifier usually used to define the instance of the program the student is taking.

Impact on Financial Aid Processing: External Program ID isn't used to decide when a new enrollment is created in packaging, but can be used within configuration.

If a school offers multiple programs within the same degree/career level, this field can be used to identify the specific program/plan/major that the student is attending. This will allow you to send in the same program code to prevent new enrollments from being created unnecessarily when a student is changing programs at the same degree level.

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
BSSOM Accounting and Information Systems	Nonblank string	Yes	Any string	Yes getDescription()	<ul style="list-style-type: none"> • Student Summary • Packaging • Program Information • Enrollment Information • SAP Information • Disbursing • R2T4 Information • Credit Balance • Self Service

Field: Program Type

Description: Identifies the type of program the student is in. The school is restricted to a set of predefined options.

Impact on Financial Aid Processing: Provided value will be used to calculate the cost of attendance (COA) for the students program during packaging. Program_Type is used within **COA_Term_AY.csv** and **COA.csv** to define the cost of attendance. The program type is also used to send the program credential level to Common Origination and Disbursement (COD). It is finally used to calculate student's eligibility in Title IV funds. Be aware of how you're mapping this data in your student information system as it impacts your students' Title IV funding.

If a student is going change their program type it should correlate to a change in your program code to process Title IV funding correctly in SFP.

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
Graduate	Enum	Yes	<ul style="list-style-type: none"> • Certificate (Graduate) • Certificate (Undergraduate) • Associate • Bachelors • Graduate • Doctoral • Certificate (Post Baccalaureate) • Non credential • Certificate (Doctoral) 	Yes getProgramType()	<ul style="list-style-type: none"> • Student Summary • Program Information

Field: College

Description: Defines the college that student is enrolled.

Impact on Financial Aid Processing: This is an optional field that can be used for configuring COA or nonfederal funds.

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
College of Security and Criminal Justice	Non Blank String	No	Any String	Yes getCollege()	Program Information

Field: Special Programs

Description: Defined special program type used in communications with COD

- A = Selective Admission Associate Program
- B = Bachelor's Degree Completion Program
- N = Not Applicable
- P = Preparatory Coursework Graduate Professional Program
- T = Non Credential Teacher Certification Program
- U = Preparatory Coursework Undergraduate Program

Impact on Financial Aid Processing: The value provided is included in COD origination and disbursement records.

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
N	Enum	Yes	<ul style="list-style-type: none"> • A • B • N • P • T • U 	Yes getSpecialPrograms()	Common Record Information

Field: Program CIP Code

Description: Defined program Classification of Instructional Programs (CIP) code.

Impact on Financial Aid Processing: Value is communicated to COD based on configuration.

CIP code should match what has been configured in CIP_CODE_RULES configuration workbook and FAS_PROGRAM_CIP_CODE default configuration list defined by US Department of Education (ED). If the CIP code value from SAFI doesn't match a code configured in CIP_CODE_RULES and FAS_PROGRAM_CIP_CODE default configuration list origination will change to origination ready to be sent to COD, but will not trigger to COD.

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
11.0102	String	No	List of possible values defined by the Department of Education: http://nces.ed.gov/ipeds/cipcode/	No	Common Record Information

Field: Program Measurement Unit

Description: Defines if a program is credit hour or clock hour

Impact on Financial Aid Processing: Only credit hour is currently supported in SFP. Schools should use a conversion method defined by ED if they use clock hours.

For more information on clock hours, including credit to clock hour conversion see [the Federal Student Handbook \(Academic Calendar and Payment Periods\)](#).

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
Credit	Enum	Yes	<ul style="list-style-type: none"> Credit Clock 	Yes getProgramMeasureme	Program Information

Field: Assessed Units

Description: Schools use this field to show the number of credits the student passed out of either due to accepted credits or passing out of a course via testing.

Impact on Financial Aid Processing: Included in baseline configuration for grade level progression (**default_grade_level.groovy**).

Included in the SAP calculation for defining program length that's used in the maximum time frame and pace of completion calculations.

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
3.50	Double	No	Any numeric value	Yes getAssessedUnits()	<ul style="list-style-type: none"> Program Information SAP Information

Field: Total Required Units

Description: Defines the number of units required to complete the student's program.

Impact on Financial Aid Processing: We use this value to identify the number of remaining credits the student needs to complete to finish their program. For term programs, this value isn't used, but appears on the UI.

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
120.50	Double	Yes	Any numeric value	Yes getTotalRequiredUnits()	<ul style="list-style-type: none"> • Program Information • Packaging • Disbursing • Credit Balance • SAP Information

Field: Primary Location

Description: Primary location of the program

Impact on Financial Aid Processing: This is mainly used in non federal funds configuration when identifying eligibility for a student at a particular campus.

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
Main Campus	Non Blank String	Yes	Any string	Yes getPrimaryLocation()	Program Information

Field: OPEID

Description: Office of Post secondary Education ID (OPEID) for the program

Impact on Financial Aid Processing: Used in communications with COD for Title IV funds. Should match an OPEID configured in your **SCHOOL.csv** configuration workbook.

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
59689526	8 Digit String (0-9)	Yes	Any string	Yes getOpeld()	Common Record Information

Field: Modality

Description: Defines if this program is taken on ground or online

Impact on Financial Aid Processing: We use this field to decide how to calculate the COA based on the institutions specific configuration.

Also, it can be used by our non federal funds configuration engine for eligibility and awarding. At least one of the course sub element's Modality fields should match this modality field.

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
Online	Enum	Yes	<ul style="list-style-type: none"> Ground Online 	Yes getModality()	Program Information

Field: FA Eligible Indicator

Description: Indicates if the program is Title IV eligible

Impact on Financial Aid Processing: Used within the general Title IV, subsidized and unsubsidized eligibility calculations.

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
True	Boolean	Yes	<ul style="list-style-type: none"> True False 	Yes getFaEligibleIndicator()	<ul style="list-style-type: none"> Program Information Packaging Disbursing Credit Balance

Field: Primary Program Indicator

Description: This field indicates if the program is currently the student's primary program

Impact on Financial Aid Processing: SFP will only package a student when the primary program indicator is true.

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
True	Boolean	Yes	<ul style="list-style-type: none"> True False 	No	Program Information

Field: GPA

Description: This is the student's current program grade point average (GPA) at the point the SAFI is sent.

Impact on Financial Aid Processing: No impact

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
3.25	Nonnegative Double	No	Any numeric value	Yes getGpa()	Program Information

Field: Required GPA

Description: This is the program GPA that's required to pass a component of the SAP evaluation.

Impact on Financial Aid Processing: Used as the program required GPA within the GPA component of the SAP evaluation.

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
3.25	Nonnegative Double	No	Any numeric value	Yes getRequiredGpa()	<ul style="list-style-type: none"> Program Information SAP Information

Field: Program Start Date

Description: The program start date defines the point at which the system will begin packaging the student for financial aid.

Impact on Financial Aid Processing: The package will start with the first term that falls on hour after the later of the program start date or the packaging start date, if one was sent in.

If you're bringing a student into SFP mid-program, this value will be ignored and will instead package the student as of the packaging start date. The packaging start date event is an integration message that should be set per student and program.

- If a package start date is sent in 1 day after the term starts, the packaging engine will not start until the following Academic Year (AY).
- A packaging start date event should be sent in with at least the program code and the enrollment ID, if you know it. Without this the packaging start date will apply to all current and future enrollments.

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
2025-01-01	Date	Yes	Any Date but the Program Start Date tag must be on or after 2013-07-01 and the Primary program must not contain a 'Course Start Date on or after Program Start Date	Yes getStartDate()	<ul style="list-style-type: none"> Student Summary Program Information

Field: Change Of Program Start Date

Description: To be used only by non term program students

Impact on Financial Aid Processing: Not used for term programs, this is only used for converting students that are changing programs in a non term program.

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
2025-01-01	Date	No	Any Date	No	Program Information

Field: Academic Completion Date

Description: Date student finishes their degree program

Impact on Financial Aid Processing: This field is for UI purposes but can be used in custom configuration and letter generation for exit processing.

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
2025-01-01	Date	No	Any Date	Yes getAcademicCompleti	Program Information

Field: Official Last Date of Attendance

Description: The last date the student attended before leaving or completing their program

Impact on Financial Aid Processing: Date field that describes the student's official last date of attendance. This is used during the R2T4 calculation for program withdrawals, late disbursements, and post withdrawals.

SFP assumes that if the official last date of attendance is before the first academic year start date, then the student hasn't started attending.

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
2025-01-01	Date	No	Any date Last Date Of Attendance is required when StudentEnrollmentStat is W, D or G	Yes getOfficialLastDateOfA	<ul style="list-style-type: none"> Program Information R2T4 Information

Field: Date of Determination

Description: Date school identifies the student withdrew from school

Impact on Financial Aid Processing: Date field that's used during the R2T4 calculation. For example, to ensure the R2T4 calculation is completed within 30 days of the Date of Determination (DOD) and the post withdrawal process to identify an inadvertent payment checked in Post Withdrawal Disbursement (PWD) criteria.

If the student's DOD is changed within the time period that an R2T4 calculation was scheduled, the calculation will still be run on the day it was originally intended. For example, 14 days from the DOD for an unofficial withdrawal.

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
2025-01-01	Date	No	Any date Date Of Determination is required when StudentEnrollmentStatus is W or D	Yes getDateOfDeterminatio	<ul style="list-style-type: none"> Program Information R2T4 Information

Field: Enrollment Status

Description: Defines a students academic load in the defined program

- AM - Admitted/Not Started
- AC - Academic Complete
- F - Full Time
- H - Half-time or more, but less than full-time
- L - Less than half- time
- A - Approved Leave of Absence
- X - Never Attended
- C - Cancel
- D - Deceased
- W - Withdrawn (voluntary or involuntary)
- G - Graduated

Impact on Financial Aid Processing: The program enrollment status can be used when configuring the term enrollment status to control fund eligibility. For example, in baseline configuration if the program enrollment status is X - Never Attended, the enrollment status is set to not attending and the student will not be eligible for Title IV funds.

Also within packaging, this field is also used for deciding how to calculate the COA based on the institutions specific configuration. Ensure your COA doesn't get reduced upon loading a withdrawal SAFI.

Also, the enrollment status is used to decide whether to award or disburse the student if they're in that enrollment status. For awarding, the program enrollment status is configurable (F|H|L|A|X|G|W|AC|AM) The enrollment status is also used within disbursement criteria.

Exit processing is also triggered for D - Deceased, W - Withdrawn (voluntary or involuntary), and G - Graduated to trigger R2T4 calculations and exit counseling notifications as needed.

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
AM	Enum	Yes	<ul style="list-style-type: none"> • AM • AC • F • H • L • A 	Yes getEnrollmentStatus()	<ul style="list-style-type: none"> • Student Summary • Program Information • Packaging • Credit Balance • Disbursing

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
			<ul style="list-style-type: none"> • X • C • G • D • W 		<ul style="list-style-type: none"> • Enrollment Information • R2T4 Information

Field: Enrollment Status Subtype

Description: Used to identify the type of program withdrawal

Impact on Financial Aid Processing: Will be leveraged by R2T4 configuration to decide when to perform the R2T4 calculation based on the value. Within the **R2T4.csv** configuration workbook the start date time frame can be configured for each enrollment status subtype.

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
UW - Unofficial Withdrawal	Enum	No	<ul style="list-style-type: none"> • UW - Unofficial Withdrawal • OW - Official Withdrawal • AW - Administrative Withdrawal • D - Deceased <p>Field MUST be populated when the Enrollment Status = "W"</p>	Yes getEnrollmentStatusSub	<ul style="list-style-type: none"> • Program Information • R2T4 Information

Field: Enrollment Status Effective Date

Description: Date for which the enrollment status is effective.

Impact on Financial Aid Processing: This should be updated whenever the student's enrollment status changes but has no impact on term programs.

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
2025-01-01	Date	Yes	Any date	Yes getEnrollmentStatusEff	<ul style="list-style-type: none"> • Student Summary • Program Information

Field: Admission Status

Description: Student's Student Information System (SIS) defined admission status

Sample values:

- RG - Regular
- RR - Registered
- OP - Orientation Pending
- AM - Admitted
- DF - Deferred
- PV - Provisional
- RI - Registered International Credentials
- CD - Conditional
- ND - Non Degree
- DC - Denied for Cause
- DN - Denied
- DE - Admission Deadline Exceeded
- RE - Re-entry Required

Impact on Financial Aid Processing: This field doesn't drive any downstream processes; however, the awarding and disbursing engine can look at this value, through groovy configuration, to decide whether to award or disburse a student appropriately.

The allowable admission statuses for packaging Title IV funds is configured in the **T4_CRIT.csv** configuration workbook (RG - Regular|AM - Admitted|PV - Provisional).

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
RG - Regular	Non Blank String	Yes	Any string	Yes getAdmissionStatus()	<ul style="list-style-type: none"> • Program Information • Packaging • Disbursing

Field: Academic Status

Description: Student's SIS defined academic status

Sample values:

- RG - Regular
- AP - Academic Probation
- DA - Disqualified for Admission
- AD - Academic Disqualification
- SD - Scholastic Disqualification
- SS - Scholastic Suspension

- EX - Expulsion

Impact on Financial Aid Processing: This field doesn't drive any downstream processes; however, the awarding and disbursing engine can look at this value, through groovy configuration, to decide whether to award or disburse a student appropriately.

The allowable academic statuses for packaging Title IV funds is configured in the T4_CRIT.csv configuration workbook (RG - Regular|AP - Academic Probation).

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
RG - Regular	Non Blank String	Yes	Any string	Yes getAcademicStatus()	<ul style="list-style-type: none"> • Program Information • Packaging • Disbursing

Field: Manual SAP Evaluation Indicator

Description: Identifies whether the SAP evaluation needs to be completed by a manual user rather than automatically by SFP.

Impact on Financial Aid Processing: If a true value is loaded for a student, when SAP is required a task will be created in the review SAP evaluation task queue for manual review. This value can also be controlled on the UI from the student summary. The UI value will override any value sent in the SAFI message if overridden.

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
True	Boolean	No	<ul style="list-style-type: none"> • True • False 	Yes getManualSapEvaluation	Student Summary

Field: Return to Title IV SAFI Indicator

Description: Used to indicate that the R2T4 should be calculated for using this SAFI

Impact on Financial Aid Processing: Once this value is set to true on a withdrawn SAFI the R2T4 will be triggered for this student using the provided SAFI data.

If the student is withdrawn and a SAFI isn't received with the R2T4 indicator set to true by day 29, the R2T4 calculation will be calculated based on the most recent withdrawn SAFI received.

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
True	Boolean	No	<ul style="list-style-type: none"> • True • False Return To Title IV SAFI Indicator must be set	No	Not viewable from UI

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
			only when the Student is Withdrawn		

5 Program Length Element

Specifies the overall duration and measuring criteria of the program, such as years or credits.

Required Element? No

Can Repeat? No

Field: Program Length Measurement Unit

Description: When schools define a program, they've to declare the length of the program. This field defines the measurement unit that's used to measure the defined program length.

Impact on Financial Aid Processing: Use with the number of units for Common Origination and Disbursement (COD) communication, that's:

- If the program length measurement unit is in years, then the number of units will be reported to COD in years.
- If you've a program that's smaller than the Academic Year Definition (AYD), then we'd want the program length measurement unit in weeks.

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
Years	Enumeration (Enum)	Yes	<ul style="list-style-type: none"> • Years • Months • Weeks 	Yes getProgramLengthMea	<ul style="list-style-type: none"> • Program Information • Packaging • Common Record Information

Field: Number of Units

Description: This is the defined program units that's defined with the Department of Education for the program

Impact on Financial Aid Processing: Use with the program length measurement unit for COD communication, that's:

- If the program length measurement unit is months, then the number of units will be reported to COD in months.
- If reporting this value in years, then you'll need to indicate the year as a whole number.

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
120	Non Negative Integer	Yes	Any integer	Yes getProgramLengthNum	<ul style="list-style-type: none"> • Program Information • Packaging

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
					<ul style="list-style-type: none">• Common Record Information

6 Transfer Information Element

Lists credits and relevant institution information for coursework transferred into the student’s program.

Required Element? No

Can Repeat? No

Field: Total Accepted Units

Description: This value represents the number of credits that has been accepted for the program from an external institution.

Impact on Financial Aid Processing: No impact to Financial Aid (FA) processing within Student Financial Planning (SFP). Will affect the amount of credits that need to be sent to complete the program.

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
24.50	Double (can be negative)	Yes	Any numeric value Will repeat for each institution that has accepted transfer credits.	Yes getTotalAcceptedTransf	Program Information

Field: Name

Description: This value represents the name of the institution for which there are accepted transfer credits.

Impact on Financial Aid Processing: No impact to FA processing within SFP

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
University of XYZ	String	Yes	<ul style="list-style-type: none"> Any string Will repeat for each institution that has accepted transfer credits.	No	Program Information

Field: NSLDS School Code

Description: National Student Loan Data System (NSLDS) school code about the transfer institution

Impact on Financial Aid Processing: No impact to FA processing within SFP

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
02809933	String	Yes	<ul style="list-style-type: none">Any string Will repeat for each institution that has accepted transfer credits.	No	Program Information

7 Academic Year Definition Element

Describes how the academic year is established for the program, including credits and weeks of instruction.

Required Element? No

Can Repeat? No

Field: Academic Year Measurement Unit

Description: This value identifies if the academic year is a credit or clock hour.

Impact on Financial Aid Processing: Only credit hour is supported and is sent in with the program measurement unit field.

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
Credit	Enumeration (Enum)	Yes	No	No	<ul style="list-style-type: none"> Program Information Packaging Disbursing

Field: Number of Units

Description: Represents the Academic Year Definition (AYD) in terms of credits required to complete an Academic Year (AY)

Impact on Financial Aid Processing: Student Financial Planning (SFP) relies on the schools setting the academic terms/units to meet the regulatory minimum.

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
24	Non Negative Integer	Yes	No	Yes getAydUnits()	<ul style="list-style-type: none"> Program Information Packaging Disbursing

Field: Number of Instructional Weeks

Description: Represents the AYD in terms of instructional weeks required to complete an AY

Impact on Financial Aid Processing: SFP relies on the schools setting the academic terms/weeks to meet the regulatory minimum.

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
30	Non Negative Integer	Yes	No	Yes getAydWeeks()	<ul style="list-style-type: none">• Program Information• Packaging• Disbursing

8 Term Element

Outlines the way the academic year is divided into terms, such as semesters or quarters.

Required Element? Yes

Can Repeat? No

Best Practices: Once a term has been communicated once in a Student Academic and Financial Information (SAFI) it should remain in the SAFI even if the student never attends.

Field: Term Type

Description: Defines the term type for the program

Impact on Financial Aid Processing: Field is only used for display purposes.

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
Semester	Enumeration (Enum)	Yes	<ul style="list-style-type: none"> Semester Trimester Quarter 	Yes getTermType()	<ul style="list-style-type: none"> Program Information

Field: Terms per Academic Year

Description: Defines the number of terms per academic year. We'll use this value to appropriately create the academic years.

Impact on Financial Aid Processing: Use by Borrower Based Academic Year (BBAY) term schools only.

For BBAY Term schools, we'll never begin an academic year for which a student isn't attending any courses. The academic year can contain terms without any courses as long as it begins with a term that the student is attending.

This field is also use for Pell Formula 1 to decide the number of terms in an academic year.

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
2	Positive Integer (>0)	No	No	Yes getTermAcys()	Not viewable from UI

9 Academic Year Element

Details the start and end dates for each of the student's academic years within a program.

Required Element? Yes

Can Repeat? Yes

Field: Academic Year Number

Description: Number that represents the academic year for the student

Impact on Financial Aid Processing: None

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
1	Positive Integer (>0)	Yes	Academic Year Numbers must be unique	Yes getAcademicYearNum	<ul style="list-style-type: none"> Program Information Packaging

Field: Start Date

Description: Date that represents the student's academic year start date

Impact on Financial Aid Processing: None

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
2025-08-20	Date	Yes	Academic Year dates should not overlap with other academic years	Yes getStartDate()	<ul style="list-style-type: none"> Program Information Packaging

Field: End Date

Description: Date that represents the student's academic year end date

Impact on Financial Aid Processing: None

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
2026-05-04	Date	Yes	Academic Year dates should not overlap	Yes getEndDate()	<ul style="list-style-type: none"> Program Information

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
			with other academic years		<ul style="list-style-type: none">• Packaging

10 Term Periods Element

Breaks down individual terms, specifying dates and student statuses such as enrolled or withdrawn.

Required Element? No

Can Repeat? Yes

Field: Description

Description: Description of the term

Impact on Financial Aid Processing: Students will be packaged based on the terms present in the Student Academic and Financial Information (SAFI).

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
Fall Term	String	No	No	Yes getDescription()	<ul style="list-style-type: none"> Program Information Packaging Disbursing

Field: Start Date

Description: Date that represents the student's term start date

Impact on Financial Aid Processing: The start date is used to define the terms within a students academic year.

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
2025-09-01	Date	Yes	Term Start Date can't be after Term End Date	Yes getStartDate()	<ul style="list-style-type: none"> Program Information Packaging Disbursing

Field: End Date

Description: Date that represents the student's term end date

Impact on Financial Aid Processing: The end date is used to define the terms within a students academic year.

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
2025-12-01	Date	Yes	Term End Date should be after Term Start Date	Yes getEndDate()	<ul style="list-style-type: none"> Program Information Packaging Disbursing

Field: Students Term Status

Description: Used to determine a term withdrawal

Sample values:

- Withdrawn
- Reentering Withdrawn Term

Impact on Financial Aid Processing: Term level enrollment status that's used to identify when an Return to Title IV (R2T4) calculation for a specific term is required.

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
Withdrawn	Enum	No	No	Yes getStudentsTermStatus	<ul style="list-style-type: none"> Program Information Packaging R2T4 Information

Field: Students Term Sub Type

Description: Used to identify the type of term withdrawal

Impact on Financial Aid Processing: Will be leveraged by the R2T4 configuration to decide when to perform the R2T4 calculation based on the value.

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
UW - Unofficial Withdrawal	Enum	No	Field MUST be populated when the Students Term Status = "W"	Yes getEnrollmentStatusSu	<ul style="list-style-type: none"> Program Information Packaging R2T4 Information

Field: Students Term Status Effective Date

Description: Date for which the term status is effective

Impact on Financial Aid Processing: This should be updated whenever the student's term status changes.

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Location(s)
2025-01-01	Date	No	Field MUST be populated when the Students Term Status = "W"	Yes getEnrollmentStatusEff	<ul style="list-style-type: none"> Student Summary Program Information Packaging

Field: Official Last Date of Attendance

Description: The last date the student attended before leaving or completing their term

Impact on Financial Aid Processing: Date field that describes the student's official last date of attendance. This is used during the R2T4 calculation for term withdrawals, late disbursements, and Post Withdrawal Disbursements (PWD).

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
2025-01-01	Date	No	Field MUST be populated when the Students Term Status = "W"	Yes getOfficialLastDateOfA	<ul style="list-style-type: none"> Program Information Packaging R2T4 Information

Field: Date of Determination

Description: Date school identifies the student withdrew from school for the term.

Impact on Financial Aid Processing: Date field that's used during the R2T4 calculation, ensure that the R2T4 calculation is completed within 30 days of the Date of Determination (DOD) and the post withdrawal process identifies an inadvertent payment (checked in PWD disbursement criteria).

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
2025-01-01	Date	No	Field MUST be populated when the Students Term Status = "W"	Yes getDateOfDeterminatio	<ul style="list-style-type: none"> Program Information Packaging R2T4 Information

Field: Return to Title IV SAFI Indicator

Description: Used to indicate that the R2T4 should be calculated for the term using this SAFI.

Impact on Financial Aid Processing: Once this value is set to "True" on a withdrawn SAFI the R2T4 will be triggered for this student using the provided SAFI data.

If the student is withdrawn and a SAFI isn't received with the R2T4 indicator set to true by day 29, the R2T4 calculation will be calculated based on the most recent W SAFI received.

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
True	Boolean	No	Return To Title IV SAFI Indicator must be set only when the Student is Withdrawn for the term.	No	Not viewable from UI

11 Summer Element

Handles student data specifically for summer terms, including dates, statuses, and withdrawal information.

Required Element? No

Can Repeat? Yes

Best Practices: Once a term has been communicated once in a Student Academic and Financial Information (SAFI) it should remain in the SAFI even if the student never attends.

Field: Description

Description: Description of the term

Impact on Financial Aid Processing: Students will be packaged based on the terms present in the SAFI.

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Location(s)
Fall Term	String	No	No	Yes getDescription()	<ul style="list-style-type: none"> • Program Information • Packaging • Disbursing

Field: Start Date

Description: Date that represents the student's term start date

Impact on Financial Aid Processing: The start date is used to define the terms within a students academic year.

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Location(s)
2025-09-01	Date	Yes	Term Start Date can't be after Term End Date	Yes getStartDate()	<ul style="list-style-type: none"> • Program Information • Packaging • Disbursing

Field: End Date

Description: Date that represents the student's term end date

Impact on Financial Aid Processing: The end date is used to define the terms within a students academic year.

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Location(s)
2025-12-01	Date	Yes	Term End Date should be after Term Start Date	Yes getEndDate()	<ul style="list-style-type: none"> Program Information Packaging Disbursing

Field: Students Term Status

Description: Used to determine a term withdrawal

Sample values:

- Withdrawn
- Reentering Withdrawn Term

Impact on Financial Aid Processing: Term level enrollment status that's used to identify when an Return to Title IV (R2T4) calculation for a specific term is required.

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Location(s)
Withdrawn	Enum	No	No	Yes getStudentsTermStatus	<ul style="list-style-type: none"> Program Information Packaging R2T4 Information

Field: Students Term Sub Type

Description: Used to identify the type of term withdrawal

Impact on Financial Aid Processing: Will be leveraged by the R2T4 configuration to decide when to perform the R2T4 calculation based on the value.

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Location(s)
UW - Unofficial Withdrawal	Enumeration (Enum)	No	Field MUST be populated when the Students Term Status = "W"	Yes getEnrollmentStatusSu	<ul style="list-style-type: none"> Program Information Packaging R2T4 Information

Field: Students Term Status Effective Date

Description: Date for which the term status is effective

Impact on Financial Aid Processing: This should be updated whenever the student's term status changes.

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Location(s)
2025-01-01	Date	No	Field MUST be populated when the Students Term Status = "W"	Yes getEnrollmentStatusEff	<ul style="list-style-type: none"> Student Summary Program Information Packaging

Field: Official Last Date of Attendance

Description: The last date the student attended before leaving or completing their term

Impact on Financial Aid Processing: Date field that describes the student's official last date of attendance. This is used during the R2T4 calculation for term withdrawals, late disbursements, and Post Withdrawal Disbursements (PWD).

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Location(s)
2025-01-01	Date	No	Field MUST be populated when the Students Term Status = "W"	Yes getOfficialLastDateOfA	<ul style="list-style-type: none"> Program Information Packaging R2T4 Information

Field: Date of Determination

Description: Date school identifies the student withdrew from school for the term.

Impact on Financial Aid Processing: Date field that's used during the R2T4 calculation, ensure that the R2T4 calculation is completed within 30 days of the Date of Determination (DOD) and the post withdrawal process identifies an inadvertent payment (checked in PWD disbursement criteria).

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Location(s)
2025-01-01	Date	No	Field MUST be populated when the Students Term Status = "W"	Yes getDateOfDeterminatio	<ul style="list-style-type: none"> Program Information Packaging R2T4 Information

Field: Return to Title IV SAFI Indicator

Description: Used to indicate that the R2T4 should be calculated for the term using this SAFI.

Impact on Financial Aid Processing: Once this value is set to true on a withdrawn SAFI the R2T4 will be triggered for this student using the provided SAFI data.

If the student is withdrawn and a SAFI isn't received with the R2T4 indicator set to true by day 29, the R2T4 calculation will be calculated based on the most recent withdrawal SAFI received.

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Location(s)
True	Boolean	No	Return To Title IV Safi Indicator must be set only when the Student is Withdrawn for the term.	No	Not viewable from UI

12 Course Element

Captures information for each enrolled course, such as course ID, status, credits, grades, attendance, and eligibility for financial aid.

Required Element? No

Can Repeat? Yes

Best Practices: Once a student begins attending a course, you'll want to ensure you're sending a first Academic Related Activity (ARA) Indicator = True as several downstream processes like disbursing and Return to Title IV (R2T4) can use this indicator.

Field: External Course Id

Description: Unique course identifier used for display purposes only

Impact on Financial Aid Processing: Course data can have an impact on your enrollment status and Cost of Attendance (COA) depending on your configuration and within credit balance logic to decide whether the associated course charge should be included in the credit balance calculation.

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
012345	String	Yes	No	Yes getExternalCourseId()	<ul style="list-style-type: none"> Program Information Credit Balance

Field: Description

Description: Description of the course used for display purposes only

Impact on Financial Aid Processing: None

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
MATH 100	String	Yes	No	Yes getDescription()	<ul style="list-style-type: none"> Program Information Packaging

Field: Scheduling Status

Description: Scheduling status of the course

- **Projected:** Projected course are for courses that are projected in the future and not actual courses.
- **Scheduled:** Value represents when the student has a course that they're planning on taking in the future but have yet started. This is only for display purposes, no need to use.
- **Enrolled:** Value represents when student's begin the course. Only for display purposes.
- **Withdrawn:** Student is no longer attending course
- **Passed:** Student completed course with a passing grade
- **Failed:** Student completed course with a failing grade
- **Incomplete:** Course has ended but student is still pending a grad

Impact on Financial Aid Processing: The scheduling status is used to drive how and when a course should be included within Satisfactory Academic Progress (SAP), disbursing, credit balance, R2T4, term enrollment status calculations and other areas based on your groovy script logic.

Scheduling status is also used in our awarding criteria for course start offset date. We won't award a student if they only have projected courses within X (configurable) number of days within the future.

It's important to ensure you're sending in the correct course statuses as there are many impacts to student's financial aid eligibility.

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
Projected	Enumeration (Enum)	Yes	<ul style="list-style-type: none"> • Projected • Scheduled • Enrolled • Withdrawn • Passed • Failed • Incomplete 	Yes getSchedulingStatus()	<ul style="list-style-type: none"> • Program Information • Packaging • SAP Information • Credit Balance • R2T4 Information

Field: Start Date

Description: Course start date

Impact on Financial Aid Processing: Identifies the term to which the course will be assigned.

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
2025-09-01	Date	Yes	Course start and end dates must fall within the dates of a Term unless the TermStartDate	Yes getStartDate()	<ul style="list-style-type: none"> • Program Information • Packaging • SAP Information

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
			Element is used to instruct SFP which Term the course falls into.		<ul style="list-style-type: none"> Credit Balance R2T4 Information

Field: End Date

Description: Course end date

Impact on Financial Aid Processing: Identifies the term to which the course will be assigned.

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
2025-10-06	Date	Yes	Course start and end dates must fall within the dates of a Term unless the TermStartDate Element is used to instruct SFP which Term the course falls into.	Yes getEndDate()	<ul style="list-style-type: none"> Program Information Packaging SAP Information Credit Balance R2T4 Information

Field: First ARA Indicator

Description: Represents the first time a student has ARA within the course (could be attendance, work, and so on.)

Impact on Financial Aid Processing: This is used to identify the term enrollment status once the current date is greater than the course end date.

We also use this in our baseline configurable disbursement criteria logic to ensure that they've attended at least one course in the term/payment period before we disburse for that term/payment period, and in our credit balance logic to identify the payment period/term the student is in.

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
True	Boolean	Yes	<ul style="list-style-type: none"> True False 	Yes getFirstAraIndicator()	<ul style="list-style-type: none"> Program Information Packaging

Field: Incomplete Resolution Date

Description: Use for non term only

Impact on Financial Aid Processing: None

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
2025-12-01	Date	No	<ul style="list-style-type: none"> Incomplete Resolution Date must be >= End Date 	Yes getIncompleteResolutio	<ul style="list-style-type: none"> Program Information Packaging (Academic Year information) SAP Information

Field: Grade

Description: This is used for display only

Impact on Financial Aid Processing: This can be leveraged by the non federal fund engine to decide eligibility, awarding, and disbursing criteria.

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
A+	String	No	No	Yes getGrade()	Program Information

Field: Units

Description: This would represent the number of credits for the course and can be used for financial aid purposes

Impact on Financial Aid Processing: This is leveraged in the baseline configuration enrollment status determination groovy script. If the course is withdrawn, only count the credits if the course was withdrawn after the add/drop period. If the course isn't withdrawn, count the course credits.

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
3.0	Double (Can include 0)	Yes	No	Yes getUnits()	<ul style="list-style-type: none"> Program Information Packaging SAP Information

Field: Degree Applicable Units

Description: This would represent the number of credits that apply toward the student's degree. This is non term specific.

Impact on Financial Aid Processing: None

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
3.0	Double (Can include 0)	No	No	No	<ul style="list-style-type: none"> • Program Information • Packaging • SAP Information

Field: Comments

Description: This is used for display only.

Impact on Financial Aid Processing: None

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
Student completed course	String	No	No	Yes getComments()	Program Information

Field: Program GPA at Course End

Description: Program level Grade Point Average (GPA) at the time the student received a grade for the course, or that's, when the scheduling status for the course is updated to passed or failed.

Impact on Financial Aid Processing: When we perform a SAP calculation, we'll use the program GPA at course end for the last course in the term when deciding the SAP status.

If there are multiple courses that end on the same time, then the program GPA at course end must be the same (even if a grade for the concurrent course was decided earlier. This means that a grade could be decided for one of the two concurrent courses, the program GPA at course end would be one value and then when the second concurrent course ends, then we expect that the program GPA at course end for both courses are updated to reflect the appropriate GPA.

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
3.25	Double (Can include 0)	No	Must be populated when Scheduling Status is any of the following <ul style="list-style-type: none"> • Passed • Failed 	Yes getProgramGpaAtCourse	<ul style="list-style-type: none"> • Program Information • SAP Information

Field: Last Date of Attendance

Description: Last day the student attended in the course if they withdrew from the course.

Impact on Financial Aid Processing: This field is mainly used for a non term school where we'd identify the instructional weeks earned based on the point of withdrawal from the course. Since the Financial Aid System (FAS) doesn't need to identify the instructional weeks for term schools, this will be used for display purposes only.

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
2025-10-01	Date	No	<ul style="list-style-type: none"> Must be >= CourseTag."Start Date" && <= CourseTag."End Date" Must be populated if the Course.Scheduling Status == "Withdrawn" 	Yes getLastDateOfAttendance	<ul style="list-style-type: none"> Program Information Packaging SAP Information

Field: Location

Description: Location where the course is being taken

Impact on Financial Aid Processing: Field can be used to identify eligibility, awarding criteria, and disbursing criteria for non federal funds.

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
Los Angeles Downtown	Non Blank String	Yes	No	Yes getLocation()	Program Information

Field: Modality

Description: Provides if the course was taken online or on ground

Impact on Financial Aid Processing: Field can be used to identify eligibility, awarding criteria, and disbursing criteria for non federal funds.

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
Online	Enum	Yes	<ul style="list-style-type: none"> Ground Online 	Yes getModality()	Program Information

Field: SAP Applicable

Description: This is used to identify courses that should be included in a SAP evaluation, regardless of whether the course is program applicable.

Impact on Financial Aid Processing: If the value is true, the course will be included in the SAP evaluation, if the value is false, it will not be included in the SAP evaluation. If the value isn't included in the Student Academic and Financial Information (SAFI), the course will be included in the SAP calculation.

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
True	Boolean	No	<ul style="list-style-type: none"> • True • False 	No	SAP Information

Field: Repeat Indicator

Description: Defines whether a course is being repeated in a program

Impact on Financial Aid Processing:

- If a student is taking a first passed retake, the course would be within the program element and the repeat indicator = True. This ensures that we don't count the first passed retake as counting toward the program required units.
- If the student is taking a second or more retake of the course after they've already passed the course, then we'd expect the course to be within the unspecified program element of the SAFI. This ensures we don't award financial aid for the course as it isn't allowed by regulations.

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
True	Boolean	No	<ul style="list-style-type: none"> • True • False 	Yes getRepeatIndicator()	Program Information

Field: Term Start Date

Description: Used to instruct which term the course falls into

Impact on Financial Aid Processing: Only required if the course start or end dates fall outside of the term the course should be linked to. Once this course is linked to a term financial aid will be evaluated for this course with the term it is tied to.

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
2025-09-05	Date	No	<ol style="list-style-type: none"> 1. Term Start date within the course element does not match a specified Term Start date in the Term element. 2. Course start or end date is not contained within 	No	None

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
			the term dates for the associated term provided using the "Term Start Date" field. 3. Course start or end date shouldn't overlap with more than one term.		

13 Charge Information Element

Lists financial charges related to the student, such as tuition and fees.

Required Element? No

Can Repeat? Yes

Best Practices: Charges need to be communicated accurately for purposes of credit balance and Return to Title IV (R2T4) calculations in Student Financial Planning (SFP).

Field: External Charge ID

Description: Unique value that represents the charge or the student/charge instance

Impact on Financial Aid Processing: Charge data can have an impact on your Cost of Attendance (COA) depending on your configuration and within credit balance logic to decide whether the charge should be included in the credit balance, R2T4, and packaging.

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
123455	String	Yes	No	Yes getExternalChargeId()	<ul style="list-style-type: none"> • Packaging • Credit Balance

Field: Charge Type

Description: This is the charge type associated to the listed charge

Impact on Financial Aid Processing: Charge type data can have an impact on your COA depending on your configuration.

Resource charge type is used in credit balance calculation when parent/student has given Authorization to Hold (ATH) for Resource Fees.

Charge types that are to be used in the R2T4 calculation need to be configured within the R2T4_CHARGES.csv workbook.

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
Fees	Enum	Yes	<ul style="list-style-type: none"> • Tuition • STRF • Taxes • Misc • Resource 	Yes getChargeType()	<ul style="list-style-type: none"> • Packaging • Credit Balance • R2T4 Information

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
			<ul style="list-style-type: none"> • Fees • Course • Book • Fees 		

Field: Description

Description: Description of the listed charge

Impact on Financial Aid Processing: None

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
Course 101 Lab Fee	String	No	No	Yes getDescription()	<ul style="list-style-type: none"> • Packaging • Credit Balance

Field: Date

Description: This is the date for which the charge is incurred or expected to be incurred.

Impact on Financial Aid Processing: This field is used to associate the charge to a payment period/term within the credit balance, COA, and R2T4.

If the charge isn't at the course level, we'll associate the charge to the appropriate academic year based on the date sent.

The charge must be within the Academic Year Start/End Dates to be included in an academic year.

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
2025-01-01	Date	Yes	No	Yes getDate()	<ul style="list-style-type: none"> • Packaging • R2T4 Information • Credit Balance

Field: Amount

Description: This is the net amount of the charge.

If the charge has any adjustments that were made to it (add/drop adjustment) then we'd receive the net amount for the charge within the Charge Element and if desired by the school they could send the associated adjustment in the Adjustment Element.

Impact on Financial Aid Processing: Depending on COA configuration, this can be used to find the total net charges.

Also used in credit balance calculation to decide how much on of a future charge should be considered when student/parent has given ATH.

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
240.43	Decimal	Yes	No	Yes getAmount()	<ul style="list-style-type: none"> Packaging Credit Balance

Field: Open Amount

Description: The amount of the charge that hasn't been paid off by a payment. For example, disbursement, scholarship, and so on.

Impact on Financial Aid Processing: We'll use this along with Financial Aid (FA) eligible indicator and status during the credit balance calculation.

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
5.00	Decimal	Yes	No	Yes getOpenAmount()	<ul style="list-style-type: none"> Packaging Credit Balance

Field: FA Eligible Indicator

Description: Identifies FA eligible charges

Impact on Financial Aid Processing: Credit balance calculation will only include FA eligible charges.

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
True	Boolean	Yes	<ul style="list-style-type: none"> True False 	Yes getFinancialAidEligible()	<ul style="list-style-type: none"> Packaging Credit Balance

Field: R2T4 Only Indicator

Description: Identifies charges that should be used in the R2T4 calculation

Impact on Financial Aid Processing: If the R2T4 indicator is true and the charge type is included in the R2T4_CHARGES.csv workbook, then the charge will be included in the R2T4 calculation for that term.

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
False	Boolean	No	<ul style="list-style-type: none"> True 	Yes getR2t4OnlyIndicator()	<ul style="list-style-type: none"> Packaging

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
			<ul style="list-style-type: none"> False 		<ul style="list-style-type: none"> R2T4 Information

Field: Status

Description: Defines the status of the charge

Impact on Financial Aid Processing: Used in the credit balance calculation to identify if the charge has been posted to the student's account or is a future charge to consider when student/parent has given ATH.

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
Actual	Enum	Yes	<ul style="list-style-type: none"> Actual Estimated 	Yes getStatus()	<ul style="list-style-type: none"> Packaging Credit Balance

14 Adjustment Element

Records changes to existing charges, like refunds or corrections.

Required Element? No

Can Repeat? Yes

Field: External Adjustment ID

Description: Unique value that represents the adjustment or the student/charge/adjustment instance

Impact on Financial Aid Processing: This field is used for display purposes only.

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
123455	String	Yes	No	Yes getExternalAdjustment()	<ul style="list-style-type: none"> • Packaging • Credit Balance

Field: Type

Description: Represents the type of adjustment as defined by the institution

Impact on Financial Aid Processing: This field is used for display purposes only.

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
XYZ Adjustment Type	String	Yes	No	Yes getType()	<ul style="list-style-type: none"> • Packaging • Credit Balance

Field: Description

Description: Represents the description of the adjustment as defined by the institution

Impact on Financial Aid Processing: This field is used for display purposes only.

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
Description of XYZ	String	No	No	Yes getDescription()	<ul style="list-style-type: none"> • Packaging • Credit Balance

Field: Date

Description: Represents the date for which the adjustment was made

Impact on Financial Aid Processing: This field is used for display purposes only

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
2025-01-01	Date	Yes	No	Yes getDate()	<ul style="list-style-type: none"> • Packaging • Credit Balance

Field: Amount

Description: Represents the amount of the adjustment that was made to the charge

If the charge has any adjustments that were made to it (add or drop adjustment), then we'd receive the net amount for the charge within the charge element, and if desired by the school, they could send the associated adjustment in the adjustment element.

Impact on Financial Aid Processing: Depending on Cost of Attendance (COA) configuration, this can be used to determine the in addition to the net charges.

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
20.43	Decimal	Yes	No	Yes getAmount()	<ul style="list-style-type: none"> • Packaging • Credit Balance

Field: Status

Description: Represents the status of the adjustment- if the adjustment had already occurred or if it's planned to occur

Impact on Financial Aid Processing: This field is used for display purposes only.

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
Actual	Enumeration (Enum)	Yes	<ul style="list-style-type: none"> • Actual • Estimated 	Yes getStatus()	<ul style="list-style-type: none"> • Packaging • Credit Balance

15 Student Resource Element

Tracks and records all external funding sources provided to a student, such as scholarships, grants, and payments not managed directly by Student Financial Planning (SFP).

Required Element? No

Can Repeat? Yes

Best Practices: After a Title IV fund is disbursed through SFP, the disbursement details must be sent back via student resources to ensure the disbursement date in SFP matches the record in the student accounting application. If this isn't done downstream processes in SFP will be impacted. These student resources must be retained in the Student Academic and Financial Information (SAFI) for the entire program.

Field: External Transaction ID

Description: Value that represents the student resource

Impact on Financial Aid Processing: Use this ID from an external accounting application.

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
12345	String	Yes	No	Yes getExternalTransaction	<ul style="list-style-type: none"> • Packaging

Field: Payment ID

Description: Payment ID as defined by SFP during the disbursement of a fund

Impact on Financial Aid Processing: For all disbursements that we send across, we expect that at some point, the disbursement would be sent back to SFP with the date for which the payment was posted to the student ledger and the unapplied amount.

SFP expects that all payments are retained within the student resource section as soon as they appear the first time (used for the credit balance calculation).

If this value is blank, then we'll treat the sent fund as a student resource and try to add it to the student's package based on the academic year that contains the ledger posting date or for which the course is in (if the student resource is within the course).

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
0191208-MBA021-PELL-1-1-1-1	String	No	No	Yes getPaymentId()	<ul style="list-style-type: none"> • Disbursing • Credit Balance

Field: Source

Description: A description of the source of the sent student resource

Impact on Financial Aid Processing:None

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
Oracle Financial	String	Yes	No	Yes getSource()	<ul style="list-style-type: none"> • Packaging

Field: Fund Code

Description: Fund code that represents the sent student resource

Impact on Financial Aid Processing: The fund code sent must match a configured fund code within SFP, else the message will be rejected. This is because if the fund is managed outside of SFP, we need to know how to handle the fund (whether it reduces need, and so on.)

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
MNSTATEGRANT	String	No, if Payment ID is populated Yes, if Payment ID isn't populated	Must match Fund Code listed on Fund Configuration Engine	Yes getFundCode()	<ul style="list-style-type: none"> • Packaging

Field: Description

Description: Description of the sent student resource

Impact on Financial Aid Processing: This will be used in the UI when sending across a fund that isn't managed within SFP (For example: Walmart scholarship, grandma's contribution, and so on.). When a fund is managed outside of SFP and sent in to be added to the student's package, we don't use the description as defined when configuring the fund in SFP, instead we use this one. That way institutions can consolidate fund codes if all the funds act the same way, but send a separate description.

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
Minnesota State Grant	String	No	No	Yes getDescription()	<ul style="list-style-type: none"> • Packaging

Field: Amount

Description: Amount for which the student resource refers to (whether a payment or a fund managed outside of SFP)

Impact on Financial Aid Processing: This field is used in packaging non Title IV funds.

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
3000.32	Decimal	Yes	No	Yes getAmount()	<ul style="list-style-type: none"> Packaging

Field: Credit Balance Indicator

Description: Indicator representing if the fund can be used in the credit balance calculation

Impact on Financial Aid Processing: The credit balance calculation will only include payments in the student resource section if the credit balance is true.

If you don't want to use SFP to calculate credit balance stipends, you should include this as false for all payments.

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
True	Boolean	No	<ul style="list-style-type: none"> True False 	Yes getCreditBalanceIndicator	Not viewable from the UI

Field: Resource Fee Discount

Description: Indicator representing if the discount is being used to pay for a resource fee

Impact on Financial Aid Processing: The credit balance calculation will include resource fee discounts if configured for Authorization to Hold (ATH) for resource fees and student or parents has sent ATH resource fee.

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
True	Boolean	No	<ul style="list-style-type: none"> True False 	No	Not viewable from the UI

Field: Ledger Posting Date

Description: Date for which the payment was made on the student's ledger

Impact on Financial Aid Processing: For disbursed Title IV Payments, this date is reconciled with the date communicated with Common Origination and Disbursement (COD), and it's required to be sent before Return to Title IV (R2T4) calculation.

If the student resource isn't associated to an existing Title IV fund, or to a course in the SAFI, packaging logic will identify which payment period or term to package the student resource to.

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
2025-01-01	Date	Yes	No	Yes getLedgerPostingDate()	<ul style="list-style-type: none"> Disbursing

Field: Unapplied Amount

Description: Amount of the payment that hasn't been applied to a particular charge. This value is used in the credit balance calculation.

Impact on Financial Aid Processing: This field is used in right to cancel calculation and in credit balance calculation.

Unapplied amount must be present for Title IV funding.

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
2775.00	Decimal	No	No	Yes getUnappliedAmount()	<ul style="list-style-type: none"> Credit Balance Disbursing

Field: Amount Applied to Prior

Description: Amount of the payment that was applied to previous academic year charges.

Impact on Financial Aid Processing: Used in the credit balance calculation to allow for \$200 to go to prior year charges. Also, calculated when sending informational applied to charge amounts in late disbursement and post withdrawal disbursement messages.

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
50.00	Decimal	No	No	No	<ul style="list-style-type: none"> Credit Balance

Field: Status

Description: Status of the student resource

Impact on Financial Aid Processing: This field is used in packaging non Title IV funds. If set to actual the fund will be Awarded.

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
Actual	Enumeration (Enum)	Yes	<ul style="list-style-type: none"> Actual Estimated 	Yes getStatus()	<ul style="list-style-type: none"> Packaging Credit Balance

16 Credit Balance Element

Tracks situations where a student has a refundable balance (overpayment or excess aid) and manages the status and amount of these balances to support regulatory refund requirements.

Required Element? No

Can Repeat? Yes

Best Practices: Only needed if a school is planning to process credit balances in Student Financial Planning (SFP).

Field: Credit Balance ID

Description: SFP generated number that's the unique identifier for the credit balance

Impact on Financial Aid Processing: This field is used to associate the credit balance created in SFP.

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
12345	String	Yes	SFP generated number that's the unique identifier for the Credit Balance	No	<ul style="list-style-type: none"> Credit Balance

Field: Status

Description: Current status of the credit balance from an institutions perspective

Impact on Financial Aid Processing: This field is used to set the status of the credit balance created in SFP.

- If the recipient of the credit balance is a student or a parent, and the status of the credit balance is Pending, the credit balance calculation will be held until an updated Student Academic and Financial Information (SAFI) is received with the status updated to Cut to Recipient.
- If the status is Check Returned, a refund is triggered for the payment associated to the credit balance.
- If the status is Canceled, the amount is updated to \$0.

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
Cut to Recipient	Enumeration (Enum)	Yes	<ul style="list-style-type: none"> Pending Cut to Recipient Check Returned Returned to Lender 	No	<ul style="list-style-type: none"> Credit Balance

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
			<ul style="list-style-type: none"> Applied to Grant Overpayment Canceled 		

Field: Posted Amount

Description: Actual Credit Balance Amount Posted to the Ledger

Impact on Financial Aid Processing: None

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
250.00	Non negative decimal	No	No	No	<ul style="list-style-type: none"> Credit Balance

17 Refund Element

Documents details about processed refunds, including amounts and status.

Required Element? No

Can Repeat? Yes

Best Practices: Only needed if a school is planning to process credit balances in Student Financial Planning (SFP).

Field: Return ID

Description: SFP generated number that's the unique identifier for the return.

Impact on Financial Aid Processing: Used to associate the refund created in SFP credit balance, calculations will be on hold if there are any pending returns that haven't been posted to the student's ledger.

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
12345	String	Yes	Number that's the unique identifier for the Return	No	<ul style="list-style-type: none"> Credit Balance

Field: Status

Description: Current status of the return from an institutions perspective

Impact on Financial Aid Processing: Credit balance calculations will check the return information included to ensure that all returns associated to the program (the credit balance was triggered for) are included and posted to ledger.

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
Pending	Enumeration (enum)	Yes	<ul style="list-style-type: none"> Pending Posted to Ledger 	No	<ul style="list-style-type: none"> Credit Balance

Field: Amount

Description: Current return amount

Impact on Financial Aid Processing: SFP will not reconcile the date or amount for the returns, however this is accessible in reporting within the STUDENT_REFUND_VW view and can be used for reconciliation.

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
3000.32	Decimal	No	No	No	• Credit Balance

Field: Ledger Posting Date

Description: Date the return was posted to the student's ledger

Impact on Financial Aid Processing: SFP will not reconcile the date or amount for the returns, however this is accessible in reporting within the STUDENT_REFUND_VW view and can be used for reconciliation.

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
2025-01-01	Date	No	No	No	• Credit Balance

18 Client Message Element

Allows student-specific information to be transmitted with the Student Academic and Financial Information (SAFI) data.

Required Element? No

Can Repeat? No

Field: Message Description

Description: High level description of the message

Impact on Financial Aid Processing: Reported in resulting Financial Packaging Output (FPO) and can be used when requesting web-service to see what triggered the SAFI and package, or any other associated data customer wants to send.

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
SIS Trigger	String	No	No	No	Not viewable from UI

Field: Message

Description: Client message

Impact on Financial Aid Processing: Reported in resulting FPO and can be used when requesting web-service to see what triggered the SAFI and package, or any other associated data customer wants to send.

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
Course Change	String	Yes	No	No	Not viewable from UI

Field: Accounting Updates Indicator

Description: Defines if the update is coming from the accounting department

Impact on Financial Aid Processing: If credit balance calculation results in \$0, it will be saved and displayed on UI to show it was calculated if this indicator is true.

Example	Data Type	Required	XML Schema Validation	Accessible via Configuration?	Display Locations
True	Boolean	No	<ul style="list-style-type: none"> True False 	No	<ul style="list-style-type: none"> Credit Balance

