



Voluntary System of Accountability™ College Portrait College Affordability Estimator Configuration Guide

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This Guide provides an overview of the configuration process for the VSA College Affordability Estimator. The VSA Estimator is configured through the College Portrait application.

All VSA participants are required to include a link to a net price calculator/estimator within their College Portrait. However, the use of the VSA Estimator is optional. VSA participants may link to their own locally developed net price calculator/estimator, a commercial project, or the Department of Education Net Price Calculator template. **The target date for VSA institutions to make a net price calculator/estimator available is March 18, 2011 with the publishing of their updated 2011 College Portrait.**

The VSA College Affordability Estimator is part of the Voluntary System of Accountability (VSA) - a voluntary initiative by 4-year public universities to communicate basic, comparable information on the undergraduate student experience to important constituencies through a common web report. For more information on the VSA project visit www.voluntarysystem.org or the College Portrait website at www.collegeportraits.org.

- ❖ For more information on creating your institution's College Portrait or for assistance with the general administrative application, please see the *2010-11 College Portrait Administrative Guide* available in the Participant Resources section of the College Portrait Administrator application.
- ❖ It is strongly recommended that your institution's financial aid office be consulted and/or asked to complete the Estimator configuration to ensure data entered will most accurately reflect budgets and costs for your institution.



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Purpose of VSA College Affordability Estimator

The VSA College Affordability Estimator provides prospective students with a customized estimate of the net cost to attend a specific institution. Recent surveys^{1,2} show that students/families overestimate the actual costs to attend a public institution by as much as 30 percent, and nearly 60 percent of students/families make college choices based on published “sticker” prices alone. The VSA Estimator is intended to help students better understand that attending college is possible and financial assistance is often available.

- ❖ The VSA Estimator is designed to estimate the net price for a new full-time student during their first academic year. Please keep this purpose in mind as you make decisions about cost of attendance figures and award data.
- ❖ The VSA Estimator uses the Simplified Needs Test (income-based, without assets) within the Federal Methodology and the Automatic Zero EFC Methodology to estimate a student’s Effective Family Contribution or EFC. For those interested in the specific calculation process, two flow charts are available – one for Dependent students and one for Independent students. The flow charts can be accessed through the College Portrait Administrative Home Page, under Participant Resources.
- ❖ The VSA Estimator fulfills the requirements of the Higher Education Opportunity Act (HEOA) for a net price calculator. The HEOA deadline for institutions to post a net price calculator is October 29, 2011.
- ❖ One source for additional information on net price calculators/estimators is the Association for Institutional Research (AIR) Net Price Calculator Resource Center – see <http://airweb.org/page.asp?page=2106>

Getting Started

To start the Estimator configuration process, log into the College Portrait administrative home page using your email address and password – <http://www.collegeportraits.org/login>.

¹ Dickeson, R (2004). Collision Course. Lumina Foundation for Education Policy Brief.
<http://www.luminafoundation.org/publications/CollisionCourse.pdf>

² Hoover, E (May 24, 2010). On Sticker Prices and 'Wishful Thinking.' Chronicle of Higher Education.
<http://chronicle.com/blogPost/On-Sticker-PricesWishful/24250/>

Tips:

- ✓ All College Portrait Administrators have access to the Estimator configuration process.
- ✓ Some College Portrait Users may need to be granted permission by their institution's College Portrait Administrator. If you do not see the Estimator Configuration link, contact your institution's Administrator.

Detailed information on the administrative functions within the College Portrait application is not repeated here. For more information on the College Portrait web application, please refer to the *2010-11 College Portrait Administrative Guide* that can be found on the College Portrait Administrative homepage under Participant Resources.

Reporting Problems

If you encounter a problem or error while configuring your VSA Estimator, you can report these issues in two ways:

- ❖ Use the Report an Issue found on the left Menu of the College Portrait Administrative homepage. You can also view or edit your open issues under Open Issues.
 - A new window will open for you to describe the issue, select the issue type, indicate the page where the issue was experienced, and submit the issue. The issue will then be sent to the Support Team. There are two types of issues:
 - Critical Issues: Problems or errors that prevent you from successfully completing the Estimator configuration process. These issues will be addressed as soon as possible.
 - Feature Requests: Suggestions and feedback for improvement to the application, data entry screens, help text, etc. Feature requests will be reviewed on a regular basis and included as part of the annual evaluation of the College Portrait website and application.
- ❖ Contact the Support Team and developers using support@collegeportraits.org. Using this email will ensure that you receive answers in a timely manner from the correct person or persons.

Administrative Home Page Displays

The College Portrait administrative homepage displays the status of your institution's VSA Estimator configuration using the following indicators:

- ❖ **Not Started** – appears until the configuration process is started by clicking on the “configure Estimator” link
- ❖ **Deactivated** – Estimator configuration has started however the Estimator has not be activated to appear on the College Portrait
- ❖ **Activated** – the Estimator is configured and active on the College Portrait.

College Affordability Estimator Configuration

To start the Estimator configuration process click on the link **Configure College Affordability Estimator** to go to the College Affordability Estimator Configuration Menu

The Estimator configuration process is divided into 8 steps to help guide you through the configuration process. **It is necessary to complete the configuration in the order presented as each step builds on information entered in the previous step.** The order is particularly important if you wish to upload award data. The steps are listed below with a brief explanation and helpful hints

Tip:

- ✓ To save your work, click on the **SAVE** button at the bottom of every screen. If you click on the **GO BACK to MENU** button your work will not be saved.

Step 1. Select Academic Year and Award Data Source

Select the academic year for the cost of attendance and award data you will enter in later steps. There are three academic year options: 2009-10, 2010-11, and 2011-12.

- ❖ Both of attendance and award data must be from the same academic year for the net price estimates to be meaningful.
- ❖ The methodology for calculating a student’s EFC is based on the federal methodology and allowances from the academic year that you select.

The Estimator allows institutions to use two separate sets of award data – one for in-state students and one for out-of-state students. If your institution would prefer to use only one set of

award data for all students, check the box labeled “Use In-State Award Data Only.” You will then enter data only in the in-state award tables and those tables will be used for all students regardless of residency.

Once you’ve selected the year and whether to use one or two sets of award data, click the **SAVE** button to load the rest of the configuration menu.

Step 2. Enter Budget

Cost of Attendance budget data are entered in this step and include: tuition and fees, room and board, books and supplies, and other expenses including transportation.

- ❖ There are separate budgets for Dependent and Independent students, in-state and out-of-state students, and by living arrangement.
- ❖ The cost of attendance data should be the “typical” cost estimates for an entering first-time student.

Step 3. Customize EFC ranges (optional)

Expected Family Contribution (EFC) ranges for both in-state and out-of-state awards can be customized in this step. If no changes are made, the default EFC ranges will be displayed in the award tables. Each of the award tables will have the same EFC ranges. Award ranges can be customized in a number of ways.

- ❖ Enter the desired range directly into the data entry field in place of the default ranges
- ❖ Remove all the rows by clicking on the remove link to the far right; new rows can be added using the “add a row” button at the bottom of the row list.
- ❖ EFC ranges can also be “de-activated” by unchecking the box next to a specific row.
 - This option may be useful for the higher EFC ranges where no federal grants or loans are available. Note that if an EFC range is deactivated, it will affect all award tables for Dependent and Independent students.
 - When an EFC range is inactive, no award estimate will be generated and a custom message will display instead; the message can be entered in Step 6. Messages cannot be customized by student type or other circumstance; only one message can be displayed for all students in any deactivated range.
- ❖ For the calculations to work properly the ranges must be discrete and **cannot** overlap. When the **SAVE** button is clicked the EFC ranges will be saved, checked and automatically

adjusted so there are no overlapping ranges. After saving your work, please go back and carefully check to make sure that any automatic adjustments have not altered your intended ranges.

Tip:

- ✓ EFC ranges should be customized before award data are entered to minimize the risk of deleting award data by mistake. If EFC ranges need to be modified after award data are entered it is recommended that you download a backup copy of your award data before modifying EFC ranges.

Step 4. Add Question(s) for Additional Awards (optional)

Institution-specific awards can be included as part of the aid estimate for in-state and/or out-of-state awards; the questions to determine eligibility are added in this step. The questions must be dichotomous – “yes” or “no” answers are required. Institutions may add as many additional questions as desired.

- ❖ Click on the link – **Enter Additional Question (s)** – to go to the set-up screen. Please note that there are two links – one for in-state additional questions and one for out-of-state additional questions. If you would like to ask a question of both in-state and out-of-state students, you will need to add it in both places.
 - To add a new award click on the link – **Additional Award Set-up** – to enter the question text and award criteria.
 - For the award criteria, select the response (yes or no) that indicates a student is eligible for the award. For instance, select **YES** if the question asks if the student is a resident of Missouri with a GPA above 3.0 and all Missouri students who meet that criteria receive a \$500 grant.
 - Enter the award amounts for Dependent and Independent students in the table at the bottom of the page.
 - If you would like to enter another award question, click on **Save** and then **Return to Award List** to start the process again.
- ❖ To view or edit an existing question, click on the **View/Edit Award or Enter Data** link in the question row.
- ❖ To delete an existing question, click on the **Delete** link in the question row.

Tip:

- ✓ The text you enter in this step will appear exactly as entered for users of your institution's Estimator.

Step 5. Enter or Upload Award Data

Award data for grants, loans, and other aid for both in-state and out-of-state awards can be directly entered into the application or uploaded using an Excel spreadsheet in this step. (Note that only .xls files - not .xlsx files - can be uploaded at this time)

Recommended Guidelines for Generating Award Data

The specific award data that are produced to enter or upload into the VSA Estimator are based on the professional judgment of the financial aid officer at each institution. The following guidelines are offered to provide comparability across institutions that elect to use the VSA cost Estimator.

- ❖ The cost and aid estimates are targeted at new, full-time students at your institution. The estimates are intended to reflect aid that is typically available to the majority of students in a particular EFC range.
- ❖ The loan data should include subsidized loans and work study, not unsubsidized or private loans.
- ❖ The grant data should include at a minimum federal grant programs. If your state or institution offers other grant aid to a large number of students based on EFC level that data can also be included. It is recommended that institutions use the “additional questions” to include aid programs with more specific criteria – e.g., merit aid or athletic scholarships.
- ❖ Estimates will be more meaningful to a typical student if the award data is carefully examined and then “normalized” to exclude or adjust outliers and special cases. Examples of special cases that may require special handling include:
 - Athletic scholarship recipients
 - Military aid recipients or ROTC participants
 - Students who did not file the FAFSA before aid deadlines
 - Students who withdrew or attended less than the full academic year

Structure of Award Tables

- ❖ Award data is separated into several possible tables; the tables are presented on separate pages within the application:
 1. In-state Dependent students;
 2. In-state Independent students;
 3. Out-of-state Dependent students; and
 4. Out-of -state Independent students.
 5. The links for the Additional Award data will bring you to the Additional Awards set up page for either in-state or out-of-state awards. Please refer to the instructions in Step 4 for information on creating Additional Awards.
- Each of the pages for Independent and Dependent students contains sections representing students' intended housing choice – on campus, off campus with parents, or off-campus on own.
- The EFC ranges are identical across all of the tables.

- ❖ Six columns of data are entered for each EFC range – three for subsidized loans and three for grants. The six columns are described briefly below.
 - Loan Low - The lower bound for the amount of subsidized loans and work study typically offered to students within this EFC range.
 - Loan High - The upper bound for the amount of subsidized loans and work study typically offered to students within this EFC range.
 - Loan Median - The median amount of subsidized loans and work study typically offered to students within this EFC range. In other words, 50% of students receive an amount below this figure and 50% of students receive an amount above. **Do not enter the average award or the average of the low and high loans.**
 - Grant Low – The lower bound for the amount of grant aid typically offered to students within this EFC range.
 - Grant High – The upper bound for the amount of grant aid typically offered to students within this EFC range.
 - Grant Median - The median amount of grant aid typically offered to students within this EFC range. In other words, 50% of students receive an amount below this figure and 50% of students receive an amount above. **Do not enter the average grant award or the average of the low and high grant.**

Direct Data Entry

Award data can be entered directly into each of the tables by clicking on each of four links:

1. In-state Dependent students;
2. In-state Independent students;
3. Out-of-state Dependent students; and
4. Out-of -state Independent students.
5. The links for the Additional Award data will bring you to the Additional Awards set up page for either in-state or out-of-state awards. Please refer to the instructions in Step 4 for information on creating Additional Awards.

Tip:

- ✓ Be sure to save your work after entering each set of data.
- ✓ Download a backup copy of your data using the **Download Award Data Template** link described in the next section.

Uploading Award Data

Award data can be uploaded from an Excel file directly into the application. (Note that only .xls files - not .xlsx files - can be uploaded at this time) Additionally, you can download a copy of the award data you have either entered or uploaded to save as a backup.

- ❖ To upload your data, you will want to complete the Excel spreadsheet available by clicking one of the **Download Award Data Template** links. **Do not change the file layout (number of rows or columns) or alter the column headings or the data upload will fail.** The file itself can be renamed.
- ❖ When the award data template is complete, click the appropriate **Upload Award Data Spreadsheet** link for the template you completed from the Estimator configure menu, use the browse button to locate the file on your computer or network, and click on the upload button.
- ❖ Once you have uploaded your data, click on each of the three **Enter or View Award Data** links to review the upload and make any adjustments. Remember to click on **SAVE** if you make changes.

Tip:

- ✓ **IMPORTANT:** Uploading the award data template will replace any award-related data previously entered within the application including award data, EFC ranges, and additional question text with the data with the Excel template. It will not replace cost of attendance data.

Step 6. Enter Data and Text for the Results page

The VSA Estimator results page displays cost of attendance, financial aid, net cost estimates and other contextual data. Also included on the results page are disclaimers and certain data elements that are required by the Department of Education to comply with the Higher Education Opportunity Act (HEOA). The elements are described in more detail below.

Required Elements

- ❖ **Financial aid office email or web contact form URL and phone number.** This contact information is displayed on the Estimator results page so that prospective students can easily contact the financial aid office at your institution with questions or to apply for financial aid.
- ❖ **Percent of first-time, full-time students that received any need-based scholarship or grant aid.** The academic year for this percentage should match the academic year for the other data within the Estimator. This data element description is taken directly from the Dept. of Education template.
 - The percentage can be calculated using the definitions within the Common Data Set, Section H: divide H2(e) for First-time Full-time students (first column) by H2(a) for First-time Full-time students (first column). *(Note that this number is different than the percentage reported on the College Portrait for all full-time undergraduate students)*

Optional Elements

- ❖ **Explanations 1, 2, and 3** appear as paragraphs below the net cost estimates. The text can be used to provide additional information on aid opportunities than cannot be included in the Estimator. For example, differential tuition rates for certain programs, reciprocity agreements with other states, aid for transfer students, merit scholarships for specific groups too complicated for the additional questions, or directions on how to apply to your institution.
- ❖ **Inactive Award range message.** If any EFC ranges were deactivated in Step 3, enter the message you want to display to students with EFC in those ranges in this text box.

Tip:

- ✓ Any text entered in this Step can be previewed in Step 7.

Step 7. Review Calculations and Preview Results page

The tool on this page provides a less complex version of the user interface than prospective students will see for testing and reviewing the internal calculations and estimates provided to Estimator users. It also displays a preview of the any text or links added to the results page.

- ❖ To use the tool, enter example data for the type of student you wish to test – e.g. Dependent, in-state student living on campus, Independent out-of-state student living off campus on own, etc.
 - The first several questions determine whether a student is Dependent or Independent.
 - Once the system determines whether a student is Dependent or Independent, the remaining applicable questions for that student will automatically display.
- ❖ After all the data is entered select from one of the two view types.
 - **Review calculations**. If you select this option, the following will be displayed:
 - EFC calculations based on the academic year selected at the start of the configuration process;
 - The award data entered for the EFC range and the net price based on your institution's cost of attendance; and
 - Any additional award estimates.
 - **Preview results output**. This option will display the layout of the final results page (but not the color or exact formatting). You can use this preview to review any text that you entered in Step 6; if you need to adjust the text, go back to Step 6, revise the text and resave the page.

Step 8. Activate Estimator for Link to Appear on College Portrait

When the Estimator configuration is finished, it must be activated for the link to be included in the College Portrait. Once the Estimator is activated the Estimator URL will automatically populate the Estimator data entry field in your College Portrait. A special link directly to the Estimator will also display on the home page of your College Portrait.

- ❖ To activate the Estimator click on the **Activate** link.
 - Clicking on the **Activate** link will run a check process and display warnings (e.g., awards with zero values) that may need to be addressed to produce accurate aid estimates for Estimator users.

- Because of the multiple and varied ways that financial aid awards are determined by different institutions, the decision to address any warnings is made by the institution's financial aid officer. The Support Team or VSA staff cannot offer a judgment on their potential impact.
- ❖ If you need to deactivate your Estimator for any reason, you can do so by clicking on the **Deactivate** link.

Tip:

- ✓ Until your Estimator is activated, please ensure that you have entered an alternate cost Estimator URL or your College Portrait will fail to validate. If you deactivate your Estimator at any time after initial activation, you will need to enter an alternate cost Estimator URL in order to republish your College Portrait.
- ✓ Your institution's VSA Estimator has a unique URL that can be accessed outside the College Portrait.
 - The URL is formulaic – it is the URL of your institution's College Portrait plus “/estimator” (e.g. www.collegeportraits.org/DC/StateU/estimator).
 - A link to the VSA College Affordability Estimator can be included within other webpages at your institution.

Reset Estimator Data

The final option within the Estimator configuration process is an option to remove all of the entered data and start the configuration process over. **If you choose this option, all data will be reset to the original values. It will remove all budget and award data. The data cannot be recovered.**