



# Understanding Auto-Calculated Fields in Section 7 (HEERF)

Section 7 of the Higher Education Emergency Relief Funds (HEERF) in the Data Collection Tool corresponds to the table displayed in Question 8 from the [Final Data Collection Instrument](#). The guidance in this technical assistance document will help you better understand the layout of the section and the calculations used.

Keep in mind that the *all IHEs* will have the Number of Students and Minimum and Maximum Awards tabs. IHEs will then have a variation of the tabs Amount Disbursed – Section 18004(a)(1), Amount Disbursed – Section 18004(a)(2), and Amount Disbursed – Section 18004(a)(3) *depending on programs funded*.

- 18004(a)(1) - Student Portion and Institutional Portion
- 18004(a)(2) - Historically Black Colleges and Universities (HBCUs), Tribally Controlled Colleges and Universities (TCCUs), Minority Serving Institutions (MSIs), Strengthening Institutions Program (SIP)
- 18004(a)(3) - Fund for the Improvement of Postsecondary Education (FIPSE) Formula Grant

## SECTION 7 LAYOUT

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Below is a list of the five tabs available for data entry in Section 7 of the Data Collection Tool and the row they are mapped to from the table in Question 8 of the OMB data collection instrument for reference.

1. Number of Students: maps to the “Number of Eligible Students” and “Number of HEERF Student Recipients - Emergency Grants to Students (unduplicated)” rows.
2. Amount Disbursed - Section 18004(a)(1): maps to the “HEERF Amount Disbursed (Section 18004(a)(1) Student Aid Portion)” and “HEERF Amount Disbursed (18004(a)(1) Institutional Portion)” rows.
3. Amount Disbursed - Section 18004(a)(2): maps to the “HEERF Amount Disbursed (Section 18004 (a)(2) - HBCUs, TCCUs, MSIs, SIP)” rows.  
**NOTE!** This tab is only displayed for IHEs that received funds under any of these programs (HBCUs, TCCUs, MSIs, SIP).
4. Amount Disbursed - Section 18004(a)(3): maps to the “HEERF Amount Disbursed (Section 18004 (a)(3))” rows.  
**NOTE!** This tab is only displayed for IHEs that received funds under this program (FIPSE).
5. Minimum and Maximum Awards: maps to “Minimum and maximum awards” rows.

Higher Education Emergency Relief Fund (HEERF)  
Annual Report

1 2 3 4 5 6 7 Emergency Financial Aid 8 9 10 11

Instructions

Emergency Financial Aid

7) Use the instructions noted in the Appendix to complete the following table

Emergency Financial Aid Grants Awarded to Students (direct grants and amounts reimbursed)

Number of Students	Amount Disbursed - Section 18004(a)(1)	Amount Disbursed - Section 18004(a)(2)	Amount Disbursed - Section 18004(a)(3)	Minimum and Maximum Awards
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## SECTION 7 AUTO-CALCULATED FIELDS

There are fields in Section 7 that are auto-calculated from manual entry fields. Use the guidance to understand where the auto-calculation is being derived from in Section 7 in order to report accurate data.

### ALL HEERF EMERGENCY FINANCIAL AID GRANT ELIGIBLE STUDENTS

The “All HEERF Emergency Financial Aid Grant eligible students” field (listed below for each tab) is the auto-calculated sum of the values entered for the Full-time or Part-time students for both Undergraduates and Graduates students:

- 7.1.1) Number of Students
- 7.3.1) Amount Disbursed - Section 18004(a)(1)
- 7.7.1) Amount Disbursed - Section 18004(a)(2)
- 7.9.1) Amount Disbursed - Section 18004(a)(3)

7.1.1) All HEERF Emergency Financial Aid Grant eligible students 600

7.1.2) Undergraduates

i) Full-time students

a) Pell grant recipient 100	b) Non-Pell grant recipient 200
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ii) Part-time students

a) Pell grant recipient 50	b) Non-Pell grant recipient 100
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7.1.3) Graduates

i) Full-time students Full-time students 100	ii) Part-time students Part-time students 50
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### ALL HEERF EMERGENCY FINANCIAL AID GRANT ELIGIBLE STUDENTS – MINIMUM AMOUNT

The “All HEERF Emergency Financial Aid Grant eligible students” field in the Minimum and Maximum Awards tab – Minimum combined amount awarded question, auto-calculates with the minimum amount entered for all the Undergraduates and Graduates students.

Minimum and maximum awards  
Minimum combined (combined across HEERF funds) amount awarded to any student who received any HEERF funds and by student recipients

All HEERF Emergency Financial Aid Grant eligible students \$100.00

Undergraduates

Full-time students

Part-time recipients	Non-part-time recipients
a) \$100	b) \$200

Part-time students

Part-time recipients	Non-part-time recipients
a) \$300	b) \$400

Graduates

Full-time students	Part-time students
Part-time students	Part-time students
\$500	\$600

**ALL HEERF EMERGENCY FINANCIAL AID GRANT ELIGIBLE STUDENTS – MAXIMUM AMOUNT**

The “All HEERF Emergency Financial Aid Grant eligible students” field in the Minimum and Maximum Awards tab – Maximum combined amount awarded question, auto-calculates with the maximum amount entered for all the Undergraduates and Graduates students.

Maximum combined (combined across HEERF funds) amount awarded to any student who received any HEERF funds and by student recipients

All HEERF Emergency Financial Aid Grant eligible students \$600.00

Undergraduates

Full-time students

Part-time recipients	Non-part-time recipients
a) \$100	b) \$200

Part-time students

Part-time recipients	Non-part-time recipients
a) \$300	b) \$400

Graduates

Full-time students	Part-time students
Part-time students	Part-time students
\$500	\$600

**SUMMARY SECTION**

The “Summary” section is located on the three tabs listed below and displays the amounts that are auto-calculated based on the responses entered in the Number of HEERF Student Recipients and the HEERF Amount Disbursed questions.

**NOTE!** The Summary corresponds to the last two rows (HEERF Amount of Grants Disbursed and Average HEERF Amount Awarded) from the table in Question 8 of the Data Collection Instrument.

## HEERF Amount of Grants Disbursed

Summary

The amounts displayed under the Summary section are auto-calculated based on the responses entered in the Number of HEERF Student Recipients and the HEERF Amount Disbursed questions.

### HEERF Amount of Grants Disbursed

What was the amount of grants disbursed to students through all HEERF funds?

All HEERF Emergency Financial Aid Grant eligible students

\$0.00

Undergraduates

Full-time students

Per grant recipient: \$0.00  
Non-Per grant recipient: \$0.00

Part-time students

Per grant recipient: \$0.00  
Non-Per grant recipient: \$0.00

Graduates

Full-time students: \$0.00  
Part-time students: \$0.00

## Average HEERF Amount Awarded

Average HEERF Amount Awarded

Among students who received HEERF emergency financial aid grants, what was the average award amount per student?

All HEERF Emergency Financial Aid Grant eligible students

\$0.00

Undergraduates

Full-time students

Per grant recipient: \$0.00  
Non-Per grant recipient: \$0.00

Part-time students

Per grant recipient: \$0.00  
Non-Per grant recipient: \$0.00

Graduates

Full-time students: \$0.00  
Part-time students: \$0.00

### HEERF AMOUNT OF GRANTS DISBURSED

Sum of the amounts disbursed directly to students (Undergraduates and Graduates) as entered in the following questions:

- 7.3) What was the amount disbursed directly to students as Emergency Financial Aid Grants under Section 18004(a)(1) of HEERF?
- 7.5) What was the amount disbursed directly to students as Emergency Financial Aid Grants through the Institutional Portion of Section 18004(a)(1) of HEERF?
- 7.7) What was the amount disbursed directly to students as Emergency Financial Aid Grants through the HBCUs, TCCUs, MSIs, or SIP portion of the fund?  
**NOTE!** This question is only displayed in the Annual Report for an IHE that received grants under Section 18004 (a)(2) - HBCUs, TCCUs, MSIs, SIP
- 7.9) What was the amount disbursed directly to students as Emergency Financial Aid Grants through funds received through Section 18004(a)(3)?  
**NOTE!** This question is only displayed in the Annual Report for an IHE that received grants under Section 18004 (a)(3)

**AVERAGE HEERF AMOUNT AWARDED**

Sum of the amounts disbursed directly to students (Undergraduates and Graduates) divided by the number of HEERF student recipients who received emergency financial aid grants (rounded to two decimals).

**QUESTION 8 FROM FINAL DATA COLLECTION INSTRUMENT**

Included for reference are screenshots of Section 8 from the Final Data Collection Instrument.

Emergency Financial Aid Grants Awarded to Students (direct grants and amounts reimbursed)		All HEERF Emergency Financial Aid Grant eligible students	Undergraduates <sup>5</sup>				Graduates	
			Full-time students <sup>6</sup>		Part-time students		Full-time students	Part-time students
			Pell grant recipient <sup>7</sup>	Non-Pell grant recipient <sup>8</sup>	Pell grant recipient	Non-Pell grant recipient		
Number of Eligible Students	How many students were eligible to receive HEERF emergency grants made available under section 18004 of the CARES Act?	<autofill: sum of #s in row>						
Number of HEERF Student Recipients – Emergency Grants to Students (unduplicated)	How many students received emergency financial aid grants provided under Section 18004 of the CARES Act? (unduplicated across all HEERF sections)	<autofill: sum of #s in row>						
HEERF Amount Disbursed (Section 18004(a)(1) Student Aid Portion)	What was the amount disbursed directly to students as Emergency Financial Aid Grants under Section 18004(a)(1) of HEERF?	<autofill: sum of #s in row>						
	What is the amount reimbursed <sup>9</sup> to your institution for Emergency Financial Aid Grants to students made prior to receiving your Section 18004(a)(1) HEERF grant but after March 27, 2020?	<autofill: sum of #s in row>						
HEERF Amount Disbursed (18004(a)(1) Institutional Portion)	What was the amount disbursed directly to students as Emergency Financial Aid Grants through the Institutional Portion of Section 18004(a)(1) of HEERF?	<autofill: sum of #s in row>						
	What was the amount of the Institutional Portion of Section 18004(a)(1) of HEERF that was used to recover the cost of reimbursing students for room, board, tuition, or fees? If funds were not used for this purpose, report 50.	<autofill: sum of #s in row>						
	What was the amount disbursed directly to students as Emergency Financial Aid Grants through the HBCUs,	<autofill: sum of #s in row>						

<sup>5</sup> For students in both undergraduate and graduate categories, classify as a graduate student.  
<sup>6</sup> For students who had multiple enrollment intensities use the enrollment status at the time of initial disbursement of the HEERF emergency grant (i.e. for students who received multiple disbursements, the status upon the first disbursement) to determine full-time status or part-time status.  
<sup>7</sup> Designate the student as a Pell grant recipient if the student was a Pell grant recipient at the time of initial disbursement of the HEERF emergency grant within the applicable reporting period.  
<sup>8</sup> Includes non-FAFSA filers.  
<sup>9</sup> For the purposes of this report, institutions may determine the number of eligible students based on the number of students for whom the institution has received an Institutional Student Information Record (ISIR) plus the number of students who completed an alternative application form developed by the institution for this purpose. The institution may then apply this number to its own methodological framework for disbursement of funds to produce a final total of eligible students at the institution. The institution is not asked to make assumptions about the potential eligibility of students for whom the institution has not received an ISIR or an alternative application.  
<sup>10</sup> See FAQ #3 [here](#).

<SKIP LOGIC for those who did not receive these funds> HEERF Amount Disbursed (Section 18004 (a)(2)-HBCUs, TCCUs, MSIs, SIP)	TCCUs, MSIs, or SIP portion of the fund? If funds were not used for this purpose, report 50.							
	What was the HBCUs, TCCUs, MSIs, or SIP portion amount used to recover the cost of reimbursing students for room, board, tuition, or fees? If funds were not used for this purpose, report 50.	<autofill: sum of #s in row>						
<SKIP LOGIC for those who did not receive these funds> HEERF Amount Disbursed (Section 18004 (a)(3))	What was the amount disbursed directly to students as Emergency Financial Aid Grants through funds received through Section 18004(a)(3)? If funds were not used for this purpose, report 50.	<autofill: sum of #s in row>						
	What was the amount received through Section 18004(a)(3) used to recover the cost of reimbursing students for room, board, tuition, or fees? If funds were not used for this purpose, report 50.	<autofill: sum of #s in row>						
Minimum and maximum awards	Minimum combined (combined across HEERF funds) amount awarded to any student who received any HEERF funds and by student recipients	<autofill: min of #s in row>						
	Maximum combined (combined across HEERF funds) amount awarded to any student who received any HEERF funds and by student recipients	<autofill: max of #s in row>						
HEERF Amount of Grants Disbursed	What was the amount of grants disbursed to students through all HEERF funds?	<autofill: calculated from #s above>	<autofill: calculated from #s above>	<autofill: calculated from #s above>	<autofill: calculated from #s above>	<autofill: calculated from #s above>	<autofill: calculated from #s above>	<autofill: calculated from #s above>
Average HEERF Amount Awarded	Among students who received HEERF emergency financial aid grants, what was the average award amount per student?	<autofill: calculated from #s above>	<autofill: calculated from #s above>	<autofill: calculated from #s above>	<autofill: calculated from #s above>	<autofill: calculated from #s above>	<autofill: calculated from #s above>	<autofill: calculated from #s above>

**Understanding Auto-Calculated Fields in Section 7 (HEERF)**