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"Requires Review" Category on the IPEDS Cognos Reports

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Summary: To resolve most issues causing a "requires review" status:
1) If the employee has an SOC of 25-1xxx, check the activity percentages
2) If there is no assigned effort record, create one with an effective date of November 1 or earlier of the IPEDS reporting year.
3) Check the Tenure Data record – it must exist and must have an effective date, rank change date, and tenure status date all November 1 or earlier of the IPEDS reporting year.

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READ THE REST OF THIS DOCUMENT FOR FURTHER EXPLANATION

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I. Background

In IPEDS reports, employees are first grouped into Instructional and Non-Instructional Staff. These designations are based on an employee's activity percent distribution (aka Funding and Effort or Assigned Effort).

Instructional Staff-An occupational category that is comprised of staff who are either: 1) Primarily Instruction or 2) Instruction combined with research and/or public service. The intent of the Instructional Staff category is to include all individuals whose primary occupation includes instruction at the institution.
- Instruction: actual_activity_academic_pct > 50
- Instruction/Research/Public Service:
  (actual_activity_academic_pct + actual_activity_research_pct + actual_activity_pub_svc_pct) >= 50
  AND actual_activity_research_pct <= 50
  AND actual_activity_pub_svc_pct <= 50

Non-Instructional Staff Group 1
- Research: actual_activity_research_pct > 50
- Public Service: actual_activity_pub_svc_pct > 50

Non-Instructional Staff Group 2
- Individuals not meeting any of the above criteria.

IPEDS further requests that Non-Instructional Staff Group 2 are broken down into Bureau of Labor Standard Occupational Categories (SOC). This is done by translating BCAT to SOC using the crosswalk: https://www.usg.edu/research/assets/research/documents/BCAT_Crosswalk_03222021.pdf

II. Requires Review

In Cognos IPEDS HR Validation Reports Parts B, D, E, G and H, you may see a "fake" occupational category called "Requires Review". Employees in this category do not fit any "true" IPEDS SOC due to a conflict in the data between their SOC category and their activity percent distributions.

Specifically, employees with an SOC of 25-1xxx **MUST** have activity percent distributions meeting the criteria of Instructional Staff or Non-Instructional Staff Group 1.

The "Requires Review" category is provided in the Cognos IPEDS HR Validation Reports as an alert/diagnostic aid for institutions. If SOC category or activity percent distributions are not corrected or modified, **these employees will not be included in the IPEDS upload survey.**

The table below shows a sample of an IPEDS HR Cognos Report that contains "Requires Review":

IPEDS HR 2020

Part B2 - Number of full-time non-instructional staff
by tenure status, medical school status and occupational category

Medical Status	Occupational Category	Tenured	On Tenure Track	Not on Tenure Track Multi-Year Contract	Not on Tenure Track Annual Contract	Not on Tenure Track Less-than-annual contract	Without Faculty Status
Non-Medical	Postsecondary Teachers - Research	3	2	0	0	0	0
	Librarians	0	0	0	1	0	1
	Other Teaching and Instructional Support Occupations	0	0	0	1	0	112
	Management Occupations	13	3	0	2	0	63
	Business and Financial Operations Occupations	0	0	0	0	0	22
	Computer, Engineering, and Science Occupations	0	0	0	0	0	49
	Community Service, Legal, Arts, and Media Occupations	0	0	0	0	0	10
	Healthcare Practitioners and Technical Occupations	0	0	0	0	0	2
	Service Occupations	0	0	0	0	0	104
	Office and Administrative Support Occupations	0	0	0	0	0	87
	Natural Resources, Construction, and Maintenance Occupations	0	0	0	0	0	13
	Requires Review	4	11	0	3	0	7
Non-Medical - Summary		**20**	**16**	**0**	**7**	**0**	**470**
Overall - Summary		**20**	**16**	**0**	**7**	**0**	**470**

In any of the cells where a number appears in the "Requires Review" column, you can drill down to the individual employee detail records which will show the data in conflict. Below are the relevant data for all the records flagged as "Requires Review" in the report above:

FULL TIME EMPLOY-MENT IND	ACTUAL ACTIVITY ACADEMIC PCT	ACTUAL ACTIVITY RESEARCH PCT	ACTUAL ACTIVITY PUB SVC PCT	ACTUAL ACTIVITY ADMIN PCT	JOB CODE	JOB TITLE	SOC OCCUPATIONAL CATEGORY
Y	0	0	0	0	202X00	Assistant Professor	Postsecondary Teachers
Y	0	0	0	0	201X00	Associate Professor	Postsecondary Teachers
Y	0	0	0	0	202X00	Assistant Professor	Postsecondary Teachers
Y	0	0	0	0	202X00	Assistant Professor	Postsecondary Teachers
Y	0	0	0	100	201X00	Associate Professor	Postsecondary Teachers
Y	0	0	0	100	200X00	Professor	Postsecondary Teachers
Y	0	0	0	0	202X00	Assistant Professor	Postsecondary Teachers
Y	0	0	0	0	202X00	Assistant Professor	Postsecondary Teachers
Y					202X00	Assistant Professor	Postsecondary Teachers
Y	0	0	0	0	201X00	Associate Professor	Postsecondary Teachers
Y					932X00	Temporary Faculty	Postsecondary Teachers
Y					932X00	Temporary Faculty	Postsecondary Teachers
Y	0	0	0	100	202X00	Assistant Professor	Postsecondary Teachers
Y					932X00	Temporary Faculty	Postsecondary Teachers
Y	0	0	0	0	203X00	Instructor	Postsecondary Teachers
Y	0	0	0	0	202X00	Assistant Professor	Postsecondary Teachers
Y	0	0	0	0	202X00	Assistant Professor	Postsecondary Teachers
Y	0	0	0	0	203X00	Instructor	Postsecondary Teachers
Y	0	0	0	0	202X00	Assistant Professor	Postsecondary Teachers
Y	0	0	0	0	202X00	Assistant Professor	Postsecondary Teachers
Y	0	0	0	0	202X00	Assistant Professor	Postsecondary Teachers
Y	0	0	0	0	202X00	Assistant Professor	Postsecondary Teachers
Y	0	0	0	0	202X00	Assistant Professor	Postsecondary Teachers
Y					204X00	Lecturer	Postsecondary Teachers
Y	0	0	0	0	200X00	Professor	Postsecondary Teachers

These "Requires Review" employees have an SOC code of 25-1xxx but their activity percent distribution does not fit the definition of Instructional Staff or Non-Instructional Staff Group 1 because:

1. The activity percent is more than 50 percent administrative.
2. The activity percent fields are all zero, and/or the 4 fields don't equal to 100%
3. All fields are null.

   - Either there is no Tenure Data record in OneUSG or no Assigned Effort record in OneUSG for the employee.

   - The source for the activity percent fields is the Assigned Effort record, but **this data will not be extracted at all into HRDM if there is not a corresponding Tenure Data record for the employee.**

   - In order for an employee to be included, they must have **both a Tenure Data** record and an **Assigned Effort record** in OneUSG.

      - The **effective date, the rank change date and the tenure status date** on the Tenure Data record must **ALL** be less than or equal to the November 1 fall census date.
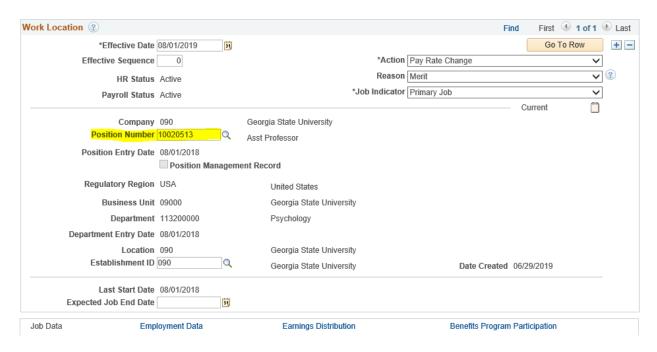
III. Resolving the "Requires Review" Errors

Options:

1. If appropriate, change the employee's Job Code to something other than SOC 25-1xxx
2. If appropriate, change the activity percent distributions so they align with Instructional Staff or Non-Instructional Staff Group 1.
   - If there is no assigned effort record, create one with an effective date that is less than or equal to November 1 of the IPEDS reporting year.
   - Check **to make sure there exists a corresponding Tenure Data record**. If not, then create one with the effective date, rank change date, and tenure status date all November 1 or earlier of the IPEDS reporting year.

OneUSG Guidance for Option 1 – Changing the Job Code:

Use the following Navigation to locate the Employee Position number:

Workforce Administration>Job Information>Job Data

Enter the Empl ID and select search. The Position Number is located on the first panel: Work Location.

Use the following Navigation to access the Position Data:

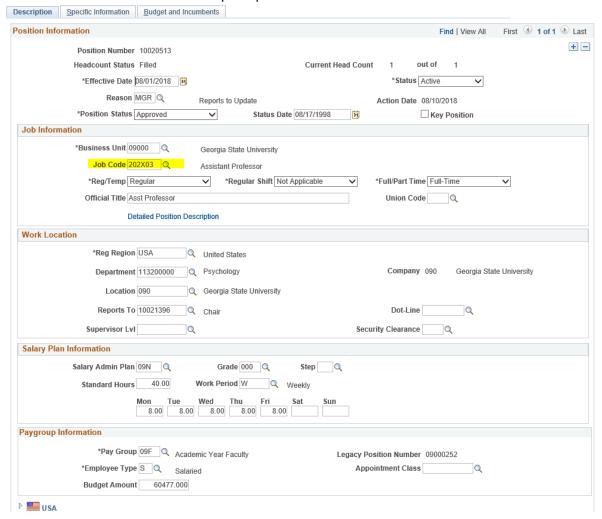*Organizational Development>Position Management>Maintain Positions/Budgets>Add/Update Position Info*

Enter the Position Number into the search field and select Search.

The Jobcode is located on the Description panel.

| Description | Specific Information | Budget and Incumbents |

Position Information   Find | View All   First ◀ 1 of 1 ▶ Last

Position Number 10020513

Headcount Status Filled   Current Head Count   1   out of   1

*Effective Date 08/01/2018 📅   *Status Active ⌄

Reason MGR 🔍   Reports to Update   Action Date 08/10/2018

*Position Status Approved ⌄   Status Date 08/17/1998 📅   ☐ Key Position

Job Information

*Business Unit 09000 🔍   Georgia State University

Job Code 202X03 🔍   Assistant Professor

*Reg/Temp Regular ⌄   *Regular Shift Not Applicable ⌄   *Full/Part Time Full-Time ⌄

Official Title Asst Professor   Union Code 🔍

Detailed Position Description

Work Location

*Reg Region USA 🔍   United States

Department 113200000 🔍   Psychology   Company 090   Georgia State University

Location 090 🔍   Georgia State University

Reports To 10021396 🔍   Chair   Dot-Line 🔍

Supervisor Lvl 🔍   Security Clearance 🔍

Salary Plan Information

Salary Admin Plan 09N 🔍   Grade 000 🔍   Step 🔍

Standard Hours 40.00   Work Period W 🔍   Weekly

Mon	Tue	Wed	Thu	Fri	Sat	Sun
8.00	8.00	8.00	8.00	8.00		

Paygroup Information

*Pay Group 09F 🔍   Academic Year Faculty   Legacy Position Number 09000252

*Employee Type S 🔍   Salaried   Appointment Class 🔍

Budget Amount 60477.000

▷ 🇺🇸 USA

OneUSG Guidance for Option 2 – Changing the Activity Percent distribution:

Use the following navigation to update the Activity percent fields, be sure to check the effective date:

Workforce development > Faculty Events > Track Events > Assigned Effort