"Requires Review" Category on the IPEDS Cognos Reports

In the Cognos IPEDS Non-Instructional Staff reports which are broken out by Occupational Category, you may see a "fake" occupational category listed in the report named "Requires Review". Employees in this category do not fit into any "true" IPEDS occupational category, due to a conflict in their data between their SOC category and their activity percent distribution (aka Funding and Effort or Assigned Effort). This "fake" category is provided in the IPEDS Cognos Validation reports purely as an alert/diagnostic aid to the institutions.

The conflict for all employees in the "Requires Review" category must be resolved so that the employee will transfer over to one of the Postsecondary Teachers categories on the Instructional Staff IPEDS reports **OR** will fit into one of the true occupational categories on the Non-Instructional Staff reports. The ultimate goal is that the "Requires Review" category will not appear on any of the IPEDS reports. Any employees still appearing in the Requires Review category in the Cognos reports will **not be included in the HR IPEDS Survey**.

Description of the Requires Review category:

From the IPEDS Survey Glossary:

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

Postsecondary Teachers - An occupational category in the 2018 Standard Occupational Classification (SOC) Manual with the SOC code 25-1000. **This category is not an IPEDS reporting category.**

In the IPEDS Survey reports, the SOC category Postsecondary Teachers is broken out into four **IPEDS occupational categories, which are defined by the activity percentages (Assigned Effort in OneUSG) of the employee**. (All the other IPEDS occupational categories are defined by the employee's SOC category. which is cross-walked from the BCAT).

The first two IPEDS Postsecondary Teachers categories are considered Instructional Staff. The second two categories are considered Non-Instructional Staff:

Instructional Staff:

1. **Postsecondary Teachers - Instruction** (determined by actual_activity_academic_pct > 50)

2. **Instruction/Research/Public Service** (Instruction combined with research and/or public service) (determined by
   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:

3. **Postsecondary Teachers - Research** (determined by actual_activity_research_pct > 50)

4. **Postsecondary Teachers - Public Service** (determined by actual_activity_pub_svc_pct > 50)

If an the activity percent distribution of an employee in the Postsecondary Teachers SOC category does not meet the criteria for Instructional Staff (1. or 2. above), they will not be included in any Cognos IPEDS reports of **Instructional Staff**. The employee will be counted in the Cognos IPEDS reports of **Non-**

Instructional Staff.

However, since the employee's SOC category is Postsecondary Teachers, if their activity percent distribution does not meet the criteria for the two categories of Postsecondary Teachers in Non-Instructional Staff (3. and 4. above) they will not fit into any legitimate occupational category on any Non-Instructional Staff reports that are broken out by IPEDS occupational categories. They will be dumped into the "fake" Requires Review category on those reports.

Sample IPEDS Cognos Report that contains the Requires Review category:

IPEDS HR 2019

	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 for the Requires Review category, 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 employees have a Job Code that maps to the SOC category of Postsecondary Teachers and that implies that their activity is primarily instructional, research or public service. However their activity percent distribution does not support this. In the records shown above, there are three scenarios in which this conflict occurs:

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 (There is simply no MFE record for the employee (the source for the activity percent fields even if an employee does not have faculty status).

Resolving the Requires Review errors:

Options:

1. Change the Job Code to one that does not map to the Postsecondary Teachers SOC category.
2. Change the activity percent distributions so that the sum of Instruction, Research and Public Service >= 50.

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 fisrt 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

Position Data

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value | Add a New Value

▼ Search Criteria

Position Number	begins with ⌄	10020513 ✕
Long Description	begins with ⌄	
Position Status	= ⌄	⌄
Business Unit	begins with ⌄	🔍
Department	begins with ⌄	🔍
Job Code	begins with ⌄	🔍
Reports To Position Number	begins with ⌄	

☐ Include History ☐ Correct History ☐ Case Sensitive

[Search] [Clear] Basic Search 🔲 Save Search Criteria

The Jobcode is located on the Description panel.

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:

     Workforce development > Faculty Events > Track Events > Assigned Effort.

Tenure/Home Dept 5101080   Reade Hall

Academic Rank

Empl ID

Annual Rate 8400.000

Tenure Status

Company 510   Valdosta State University

Assigned Effort

Find | View All   First ◀ **1 of 1** ▶ Last

➕ ➖

*Effective Date 11/12/2019 📅   EFT 1.000

Salary %

State Salary [ ]

Sponsored Salary [ ]

Contract Salary [ ]

Activity %

Instruction Activity [100]

Administrative Activity [ ]

Research Activity [ ]

Service Activity [ ]

Clinical Activity [ ]

💾 Save   🔍 Return to Search   📧 Notify   Update/Display   📄 Include History   📝 Correct History