



IPEDS Update

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Research and Policy Analysis

Spring 2023 RACIRP





Winter 2022-23 IPEDS Collection

- ❖ Student Financial Aid
 - ❖ NCES update
 - ❖ HEERF/GEER/SSARP
 - ❖ Dalton State College
 - ❖ Key



File Home Insert Draw Page Layout Formulas Data Review View Automate Developer Help Acrobat

Clipboard Font Alignment Number Styles

Calibri 11 A⁺ A⁻ B I U Wrap Text General \$ % .00 →

Normal Bad Good Neutral Check Cell Explanatory... Input Linked Cell

1	Part	Field	Field Description
2	Part A	IS_UG	Student is Undergraduate Level
3	Part A	IS_FTF	IPEDS First-time Freshman
4	Part A	DEG_SEEKING	Degree/certificate-seeking student
5	Part A	ALL_AID	Student received any financial aid. (i.e. Federal Work Study, grants, loans to students (government and/or private), assistantships, scholarships, fellowships, tuition waivers, tuition discounts, employer aid (tuition re
6	Part A	LOAN_FED	Student received a federal student loan, but not PLUS (i.e. DLUNS, DIRECT).
7	Part A	LOAN_OTHER	Student received a student loan, but not a federal student loan (i.e. LOAND, STLND)
8	Part A	LOAN_ALL	Student received a loan, but not PLUS (i.e. DLUNS, DIRECT, LOAND, STLND).
9	Part A	GRANT_ALL	Student received any grant aid (i.e. institution, state, local, federal).
10	Part A	GRANT_FED_ALL	Student received any federal aid (i.e. Pell, SEOG, EMERG).
11	Part A	GRANT_FED_OTHER	Student received other federal grants besides the federal Pell grant (i.e. SEOG, EMERG).
12	Part A	GRANT_PELL	Student received the federal Pell grant (e.g. Pell).
13	Part A	GRANT_STATE	Student received a Georgia grant (i.e. HOPE, ZHOPE, HOPEGED, STSCHD).
14	Part A	GRANT_INST	Student received any institutional grant aid (i.e. INSCHD, ISRA, waivers).
15	Part A	UGAIDN	Number of all undergraduate students who were awarded aid
16	Part A	UGAIDPN	Number of all undergraduate students who were awarded Pell grants
17	Part A	UGLNFN	Number of all undergraduate students who were awarded and accepted federal loans
18	Part A	UGAIDA	Total grant aid dollars awarded to all undergraduate students, from the federal government, state/local government, the institution, and other sources known to the institution
19	Part A	UGAIDPA	Total Pell grant aid dollars awarded to all undergraduate students
20	Part A	UGLNFA	Total federal loan dollars awarded to and accepted by all undergraduate students
21	Part A	SCFA2A	For academic reporters: the total number of degree/certificate-seeking undergraduate students enrolled in Fall 2021
22	Part A	UGAIDDGN	Number of all degree/certificate-seeking undergraduate students who were awarded aid
23	Part A	UGAIDDGA	Total grant aid dollars awarded to all degree/certificate-seeking undergraduate students, from the federal government, state/local government, the institution, and other sources known to the institution
24	Part B	IS_UG	Student is Undergraduate Level
25	Part B	IS_FTF	IPEDS First-time Freshman
26	Part B	IN_STATE	Students who paid in-state tuition rate
27	Part B	ALL_AID	Student received any financial aid. (i.e. Federal Work Study, grants, loans to students (government and/or private), assistantships, scholarships, fellowships, tuition waivers, tuition discounts, employer aid (tuition re
28	Part B	ALL_AID_NO_WS	Any aid, but federal work study and Plus loans.
29	Part B	LOAN_FED	Student received a federal student loan, but not PLUS (i.e. DLUNS, DIRECT).
30	Part B	LOAN_OTHER	Student received a student loan, but not a federal student loan (i.e. LOAND, STLND)
31	Part B	LOAN_ALL	Student received a loan, but not PLUS (i.e. DLUNS, DIRECT, LOAND, STLND).
32	Part B	GRANT_ALL	Student received any grant aid (i.e. institution, state, local, federal).
33	Part B	GRANT_FED_ALL	Student received any federal aid (i.e. Pell, SEOG, EMERG).
34	Part B	GRANT_FED_OTHER	Student received other federal grants besides the federal Pell grant (i.e. SEOG, EMERG).
35	Part B	GRANT_PELL	Student received the federal Pell grant (e.g. Pell).
36	Part B	GRANT_STATE	Student received a Georgia grant (i.e. HOPE, ZHOPE, HOPEGED, STSCHD).
37	Part B	GRANT_INST	Student received any institutional grant aid (i.e. INSCHD, ISRA, waivers).
38	Part B	SCFA12N	Number of first-time degree/certificate-seeking undergraduate students paying in-state tuition rates. Applicable only to public reporters.
39	Part B	SCFA13N	Number full-time first-time degree/certificate-seeking undergraduate students paying out-of-state tuition rates. Applicable only to public reporters.
40	Part B	ANYAIDN	Number of full-time, first-time degree/certificate-seeking undergraduates who were awarded any Federal Work Study, loans to students, or grant or scholarship aid from the federal government, state/local government
41	Part B	ANYAIDNF	Number of full-time, first-time degree/certificate-seeking undergraduates who were awarded any loans to students or grant or scholarship aid from the federal government, state/local government, or the institution



Winter 2022-23 IPEDS Collection

- ❖ Outcome Measures
- ❖ Graduation Rates
- ❖ Graduation Rates 200
- ❖ Admissions





Winter 2022-23 IPEDS Collection

❖ Admissions

- ✓ Three new admission considerations have been added.
- ✓ The options for how institutions use the admission considerations have changed.
- ✓ There is now a "50th percentile (median)" for test scores.
- ✓ References to "summer term" have been changed to "summer session".
- ✓ Added information to not report test percentiles when there are less than 5 students.
- ✓ FAQ #3 revised to clarify how to report applicants that were considered for admission.
- ✓ The consideration of 'TOEFL' scores was expanded to 'English Proficiency Test' scores to cover the range of options available to institutions.
- ✓ NCES has added a column for Institutions to report 'Another gender' in Applicants/Admissions/Enrollees.



Spring 2022-23 IPEDS Collection



- ❖ Fall Enrollment
- ❖ Human Resources*
- ❖ Academic Libraries**
- ❖ Finance**

* Leslie's update

** Institutions' responsibility

2023-24 IPEDS Collection

- ❖ Proposed 2023-24 changes

<https://www.regulations.gov/document/ED-2022-SCC-0026-0003>

- ❖ 2023-24 changes will be posted here:

<https://surveys.nces.ed.gov/ipeds/public/changes-to-the-current-year>

- ❖ RPA will review updates and communicate procedural changes



2023-24 IPEDS Collection

- ❖ 12-month Enrollment (Fall)
 - ❖ New Part C – Dual Enrollment
 - ❖ New Part D – Noncredit Enrollment
- ❖ IC Header & Institutional Characteristics
- ❖ Proposed 2023-24 changes

<https://www.regulations.gov/document/ED-2022-SCC-0026-0003>



Housekeeping

- ❖ Manual changes to your IPEDS data
Document and email us
- ❖ NCES Post Submission Review Edits
- ❖ Net Price Calculator
- ❖ Report Requests



HRDM



HRDM 2022 Recap

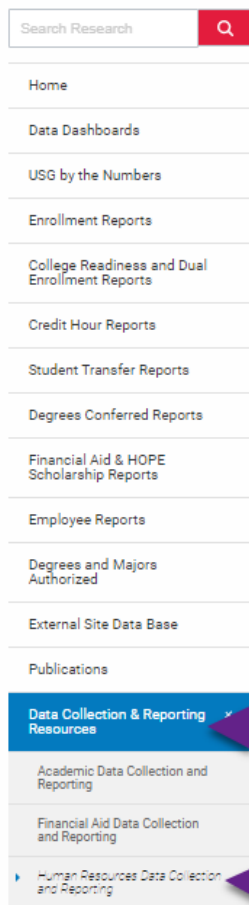


All institutions completed eCertification and locked data.

Multiple changes/requests to change data after lock date

HRDM 2022 Recap

- ❖ Updated website
 - ❖ Access from main page, under Data Collection and Reporting
 - ❖ Access the updated DED, PS to HRDM mapping report, current POC list
 - ❖ Access the specific data validations guidance docs



Human Resources

Data Collection & Reporting

Human Resources Data Element Dictionary

- [HR Data Element Dictionary with Valid Values](#)
- [PeopleSoft to HRDM Valid Value Mapping Report](#)
- [HR Data Element Dictionary Business Processes Updates Coming](#)

Updating Human Resources Data Elements

- [HRDM New Data Element/Update to Existing Data Element Request Form](#)

Submitting Human Resources Data

- [HRDM Data Validations, IPEDS HR, and Digest HR Guidance Documents](#)
- [HR Data Submission User Guide](#)

Human Resources Institution Contacts

- [Human Resources Point of Contact list](#)



HRDM 2022 Recap

- ❖ Updated documents, particularly requires review for clarity

"Requires Review" Category on the IPEDS Cognos Reports

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.

READ THE REST OF THIS DOCUMENT FOR FURTHER EXPLANATION



HRDM 2022 Recap

❖ eCertification

- ❖ Intended to confirm data have been fully reviewed by all parties, updated, and verified in Cognos
- ❖ Parallel to other data collections

Complete the eCertification (takes about 1 minute)

We are adapting this certification process as a formal signoff that the Human Resources data have been reviewed, validated, and corrected if needed.

- This form does not replace an IPEDS keyholder's responsibility for locking their IPEDS survey by the appropriate due date. Completing this form is required.
- For those selected to complete the form: access the eCertification form by clicking on the icon below. Then confirm and sign the eCertification form.



HRDM - Clarifications



Some great questions came up through the collection!

Q1. I fixed the issues in OneUSG, why are you still asking me to fix errors?

Review reports in Cognos!

The screenshot shows the IPEDS HR Survey Reports interface in Cognos Analytics. The top navigation bar includes a home icon, a search icon, and a 'What's New' notification. The main content area is titled 'IPEDS HR Survey Reports for: 2022-23'. Below the title, there is a dropdown menu for 'Institution' set to '(All)'. The interface is divided into several sections:

- Staff DG FT 15 or more**
 - FT IS/Tenure/Rank**
 - [A1 - FT Instructional, Rank and Tenure - Tenured](#)
 - [A1 - FT Instructional Rank and Tenure - On Tenure Track](#)
 - [A1 - FT Instructional Rank and Tenure - Multi-Year Contract](#)
 - [A1 - FT Instructional Rank and Tenure - Annual Contract](#)
 - [A1 - FT Instructional Rank and Tenure - Less-Than-Annual Contract](#)
 - [A1 - FT Instructional Rank and Tenure - Indefinite duration contract](#)
 - [A1 - FT Instructional Without Faculty Status](#)
 - [A2 - FT Instructional, Function](#)
 - [A3 - FT Instructional Totals](#)
 - FT by primary function**
 - [B1 - FT Non-instructional, Occupation - 1](#)
 - [B1 - FT Non-instructional, Occupation - 2](#)
 - [B1 - FT Non-instructional, Occupation - 3](#)
 - [B1 - FT Non-instructional, Occupation - 4](#)
 - [B2 - FT Non-instructional, Occupation and Tenure - 1](#)
 - [B2 - FT Non-instructional, Medical School Status - 2](#)
- Salaries**
 - [G1 - Salaries Worksheet](#)
 - [G2 - Salary Outlays, Instructional Staff](#)
 - [G3 - Calculated by IPEDS](#)
 - [G4 - Salary Outlays, Non-Instructional Staff](#)
- Staff DG PT 15 or more**
 - PT by primary function**
 - [D - PT Staff, Occupation - 1](#)
 - [D - PT Staff, Occupation - 2](#)
 - [D - PT Staff, Occupation - 3](#)
 - [D - PT Staff, Occupation - 4](#)
 - [D - Graduate Assistants](#)
 - [E - PT Staff, Occupation and Tenure - 1](#)
 - [E - PT Staff, Medical School Status - 2](#)
 - PT Summary**
 - [F - PT summary Non-medical school staff](#) (reference only - IPEDS generated)
 - [F - PT summary Medical school staff](#) (reference only - IPEDS generated)
- Detail files**
 - [HR Detail](#)
 - [IPEDS HR Detail](#)

Additional information at the bottom right includes: 'Requires Review: 40' and '*Review Parts B, D, E, G and H'. 'Gender Unknown: 513'.

Q1. Review Reports in Cognos

What you see in OneUSG may not match Cognos reports:

1. IPEDS HR reports are based on the HRDM
 - See HR DED and PS to HRDM translation document
2. The Cognos reports reflect the definitions used in IPEDS reports.

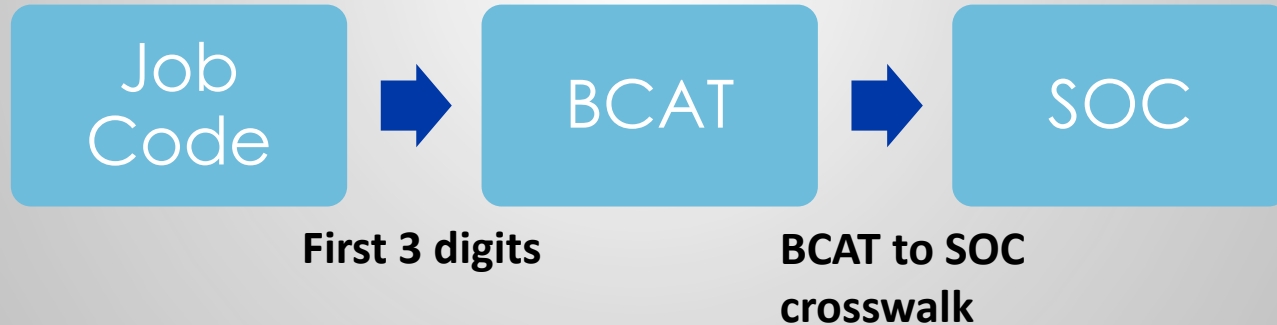
IPEDS Human Resources Survey - 2022/2023 USG Cognos Report Definitions			
These data definitions are applied to create reports in Cognos for review PRIOR to the IPEDS Human Resources Survey Submission. Please note that some differences between Cognos reports and files submitted to IPEDS (for example, 'requires review' or 'unknown' gender)			
Variable	HRDM Field (See HRDM DED for more information)	Source Field OneUSG Table.Field	Expression
Fields in blue are entered in the Managed Faculty Events section and found in the 'Employee Faculty' section of the HRDM			
Full Time/Part Time	Fulltime Employment Indicator	PS.JOB_FULL_PART_TIME	Fulltime Employment Indicator = 'Y' or 'N'
Faculty Status	Tenure Status Code	PS_EG_TENURE_DATA.TENURE_STATUS	tenure_status_code in ('NTK', 'NA', 'TEN')
Not on Tenure Track	PS		Always zero since we have no multi-year contracts

Q1. Review Reports in Cognos



Q2. Why is this person listed as instructional (25-1xxx)? How can I change their SOC?

SOCs are set at the system level.
Institutions control the job code.



Q3. Why are you asking me to create a tenure record for this person? They are not faculty!

Having a tenure record \neq faculty

IPEDS Human Resources Survey - 2022/2023 USG Cognos Report Definitions			
These data definitions are applied to create reports in Cognos for review PRIOR to the IPEDS Human Resources Survey Submission. Please note that some differences between Cognos reports and files submitted to IPEDS (for example, 'requires review' or 'unknown' gender)			
Variable	HRDM Field (See HRDM DED for more information)	Source Field OneUSG Table.Field	Expression
Fields in blue are entered in the Managed Faculty Events section and found in the 'Employee Faculty' section of the HRDM			
Full Time/Part Time	Fulltime Employment Indicator	PS_JOB.FULL_PART_TIME	Fulltime Employment Indicator: 'FT', 'PT'
Faculty Status	Tenure Status Code	PS_EG_TENURE_DATA.TENURE_STATUS	tenure_status_code in ('NTK', 'NA', 'TEN')
Not on Tenure Track	n/a		Always zero since we have no multi-track positions

For IPEDS, Faculty = tenure status of 'Tenured,' 'Not Tenured, on Track,' 'Not in a Tenure Track Position.'

Q4. What do you mean, the activity percentages aren't in the Cognos reports?

Activity percentages will not be extracted if there is not an MFE record with:

- Tenure status with an effective date less than the census date
- Rank with an effective date less than the census date

**If the Cognos report shows blanks for the activity percentages in a 'requires review' record, one of these things is missing (it's often a date issue)!

Human Resources Data Element Dictionary Updates

We have been working to make the Data Element Dictionary more useful and more user friendly!



HR DED: New Intro

Human Resources Data Element Dictionary

The data element dictionary provides detailed information about each of the data elements stored in the Human Resources Data Mart (HRDM). The table below describes the information found in each field for each data element.

Element Name	Element Number						
Category	Grouping of data elements, for example, Employee Payroll						
Description	The description provides clarification on the information contained in the field. If the field is no longer in use, it will be specified in the description. If the PeopleSoft data entry field has a different name than the element name, it will be noted here.						
Data Type	Character/Number/Date						
Length	Maximum length of entry						
Format	Date format, otherwise blank						
Collection Period	Frequency of data extracted from PeopleSoft into HRDM						
Business Practices	Provides information on how to input information, including relevant knowledge articles. Knowledge articles are labeled as practitioner or employee self-service processes. Knowledge articles are located in USG Service Now (https://usg.service-now.com/usgsp).						
Validation Rules	<table border="1"><thead><tr><th>Severity</th><th>Code</th><th>Description</th></tr></thead><tbody><tr><td colspan="3">Evaluation rules during extraction that will cause errors</td></tr></tbody></table>	Severity	Code	Description	Evaluation rules during extraction that will cause errors		
Severity	Code	Description					
Evaluation rules during extraction that will cause errors							

Valid Values

Code	Description
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This section includes all HRDM valid values, both those currently in use and those that are no longer active. This is because historical data are still extracted and used for reporting. For information on which values are currently active refer to the "PeopleSoft to HRDM Valid Value Mapping" report in Cognos – in the PS Status column, 'A' indicates an active value and 'I' indicates an inactive value. This report is located here: Cognos > Data Collections > Human Resources > 'PeopleSoft to HRDM Valid Value Mapping'

HR DED: New Intro

Data Source	<i>Provider</i>	Source of the data (Primarily PeopleSoft or Human Resources Data Mart (HRDM))
	<i>Table</i>	In the source application, this is the table where the element value is stored
	<i>Column</i>	In the source application table, this is the column where the values are stored
	<i>Page</i>	If relevant, the PeopleSoft page where the information is entered
	<i>Navigation</i>	If relevant, the navigation to the PeopleSoft page where the information is entered
Effective Terms	<i>Start</i>	Date the element was first collected
	<i>End</i>	Date the element stopped being collected, (None) if the element is currently collected.
Target Files	<i>Target Type</i> <i>Table Name</i> <i>Column Name</i>	
	This section describes where the data are stored in the HRDM	
Change History	<i>Date</i> <i>Notes</i>	
	This section includes information about any changes made to the element over time	

HR DED: Valid Values

- For paired code/description elements, only the code element will contain the list of codes and descriptions.
- For elements with many values that are updated frequently (e.g., Job Code), valid values NOT in the HR DED but included in the (SUPPLEMENTAL DOCUMENT) [PeopleSoft to HRDM Valid Value Mapping Report](#)

Current HRDM Valid Values			
Element ID	Element Name	HRDM Value	HRDM Description
HED004	Degree Level	01	No Formal Education
HED004	Degree Level	02	Elementary School Completed
HED004	Degree Level	03	Some High School
HED004	Degree Level	04	High School Graduate
HED004	Degree Level	05	Terminal Occupation Program
HED004	Degree Level	06	Terminal Occupation Program
HED004	Degree Level	07	Some College - Less than 1 Yr
HED004	Degree Level	10	Associate Degree
HED004	Degree Level	13	Bachelor Degree
HED004	Degree Level	14	Post Bachelors
HED004	Degree Level	15	First Professiona

HR DED: Translation

Not all values are the same in OneUsg as in the HRDM. The second part of the [PeopleSoft to HRDM Valid Value Mapping Report](#) shows the relationship between OneUSG and HRDM values

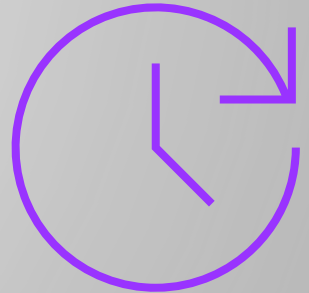
PeopleSoft to HRDM Valid Value Mapping

Element ID	Element Name	PS Field Name	PS Value	PS Description	PS Status	HRDM Value	HRDM Description	Translated
HEE004	Race Code	ETHNIC_GRP_CD	BLACK	Black/African American	A	B	Black	TRANSLATED
HEE004	Race Code	ETHNIC_GRP_CD	AMIND	American Indian/Alaska Native	A	I	American Indian or Alaskan Native	TRANSLATED
HEE004	Race Code	ETHNIC_GRP_CD	NSPEC	Not Specified	A	NULL	Not Specified	TRANSLATED
HEE004	Race Code	ETHNIC_GRP_CD	HISPA	Hispanic/Latino	I	NULL	Not Specified	TRANSLATED
HEE004	Race Code	ETHNIC_GRP_CD	PACIF	Native Hawaiian/Other Pacific Islander	A	P	Native Hawaiian or Other Pacific Islander	TRANSLATED
HEE004	Race Code	ETHNIC_GRP_CD	WHITE	White	A	W	White	TRANSLATED
HEE004	Race Code	ETHNIC_GRP_CD	ASIAN	Asian	A	Z	Asian	TRANSLATED



HRDM 2023 Looking Ahead

- ❖ Guidance documents: updates to clarify
- ❖ Adding additional POC validation in the fall to capture staffing/role changes
- ❖ Help desk tickets for changes to the POC list, HRDM listserv, or access to Cognos reports



Brainstorm Time

Problem: We are running down to the wire on the HR collection even making updates AFTER the lock date.

Question: How can RPA help expedite this process?



Questions?

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