2020 Human Resources Data Validations Webinar

October 28, 2020
Rachana Bhatt
Research and Policy Analysis
Logistics & Introduction

Please **mute** microphone when not speaking

To ask questions:
Type your question in the chat

We will stop periodically to address chat questions
and you can un-mute your microphone to talk.

Following the webinar, **we will send slides** to all attendees.
Webinar will be recorded and saved in Teams.

**Angie Bell**, Vice Chancellor for Research & Policy Analysis
Agenda

- Team Members
- Data Flow, Timeline & New User Access
- IPEDS HR
- Digest HR
- Refresh Schedule
- Changes to survey for 2020
- Guidance for data validations
- Questions/Comments
# HRDM Team Members

<table>
<thead>
<tr>
<th>ITS Administrative Services</th>
<th>Research and Policy Analysis</th>
<th>Shared Services Center</th>
<th>DBAs</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Jason Beitzel</td>
<td>• Cherry Zhang</td>
<td>• Kristine Lesher</td>
<td>• Amy Edwards</td>
</tr>
<tr>
<td>• Debbie Exum</td>
<td>• Phyllis Gagne</td>
<td>• Team</td>
<td>• Steve McDaniel</td>
</tr>
<tr>
<td>• Eddie Sellers</td>
<td>• Rachana Bhatt</td>
<td></td>
<td>• Denise Fulton</td>
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<tr>
<td>• Laurie Bush</td>
<td>• Patrick Harris</td>
<td></td>
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<tr>
<td>• David Van Houten</td>
<td>• Leslie Hodges</td>
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<td></td>
</tr>
</tbody>
</table>


Data Flow

Data entered in PeopleSoft

Data extracted to USO

HR Reports

PeopleSoft

HR Data Collection

IPEDS HR (Cognos)

Digest HR (Listserv)

All cohorts on PeopleSoft
Data Validations Timeline

Nov. 1, 2020
• Validation opens for IPEDS HR and Digest HR reports

Nov 1 - Jan 14
• Institutions review data
  • IPEDS HR Reports available for review in Cognos*
  • Digest HR Reports produced and emailed to HR POC listserv.
• Institutions make corrections in PeopleSoft so changes can be reflected in IPEDS and Digest reports

Dec 9, 2020
• IPEDS HR survey data uploaded to NCES site by RPA (initial)
  • IPEDS data will not be complete until all October payroll records are extracted. May want to wait until ~Nov 3rd to look at data.
Data Validations Timeline

Dec 20, 2020
• Digest HR reports distributed via listserv, and rerun and circulated on bi-weekly basis

Jan. 14, 2020
• Deadline for all PeopleSoft corrections

Jan. 15, 2020
• Data finalized and frozen (MAY NOT BE CHANGED)
  • IPEDS HR survey data uploaded to NCES website by RPA (final)
  • Digest HR reports run and posted on website by RPA
Access for New Users

New users need:

Access to **NCES website**
• Request from institution’s IPEDS-Keyholder

Access to **HRDM POC listserv** and **IPEDS HR Cognos reports**
• Submit an ITS Help-Desk ticket to helpdesk@usg.edu

Email to helpdesk

**Subject:** 2020 HRDM Data Validations, User Access

**Be sure to include:**
• Name, email address, and title
• Which system you need access to (HRDM POC list and/or HR Cognos reports)
IPEDS HR Reports

IES > NCES National Center for Education Statistics

IPEDS Integrated Postsecondary Education Data System

IPEDS Survey Components
IPEDS HR Reports: Cognos Website

- [https://analytics.usg.edu](https://analytics.usg.edu/)
- Use Internet Explorer
- Logon using credentials
- Go to IPEDS HR Survey Reports:
  - Cognos > Public Folders > Secure Folders > Human Resources > Navigation > Navigation Pages > IPEDS HR Survey Reports
- Follow [Cognos User Guide](https://analytics.usg.edu/) on [HR Guidance website](https://analytics.usg.edu/) to add permanent tab
# IPEDS HR Reports: Cognos

## IPEDS HR Survey Reports

**IPEDS HR Survey Reports for Current Fall Year**

First, select an Institution. Next, click on a report link below to view results.

<table>
<thead>
<tr>
<th>Institution</th>
<th>(All)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fall Year</td>
<td>2020</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>HR Detail</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>IPEDS HR Detail</strong></td>
</tr>
<tr>
<td><strong>IPEDS HR Part A</strong> - Full-time Instructional Staff (1-5)</td>
</tr>
<tr>
<td><strong>IPEDS HR Part A</strong> - Full-time Instructional Staff (Totals)</td>
</tr>
<tr>
<td><strong>IPEDS HR Part A</strong> - Full-time Instructional Staff without Faculty Status (6)</td>
</tr>
<tr>
<td><strong>IPEDS HR Part A2</strong> - Number of Full-time Instructional Staff by Tenure Status, Medical School Status and Function</td>
</tr>
<tr>
<td><strong>IPEDS HR Part B</strong> - Number of Full-time Non-instructional Staff by Occupational Category, Gender and Race/Ethnicity</td>
</tr>
<tr>
<td><strong>IPEDS HR Part B2</strong> - Number of Full-Time Non-instructional Staff by Tenure Status, Medical School Status and Occupational Category</td>
</tr>
<tr>
<td><strong>IPEDS HR Part D</strong> - Number of Graduate Assistants by Occupational Category, Gender and Race/Ethnicity</td>
</tr>
<tr>
<td><strong>IPEDS HR Part D</strong> - Number of Part-Time Staff by Occupational Category, Gender and Race/Ethnicity</td>
</tr>
<tr>
<td><strong>IPEDS HR Part E</strong> - Number of Part-time Staff by Tenure Status, Medical School Status and Occupational Category</td>
</tr>
<tr>
<td><strong>IPEDS HR Part G</strong> - Number of Full-time Instructional Staff, Contract Length and Salary</td>
</tr>
<tr>
<td><strong>IPEDS HR Part G</strong> - Salary Outlays for Full-time Non-instructional Staff by Occupational Category</td>
</tr>
<tr>
<td><strong>IPEDS HR Part H</strong> - Number of Newly Hired Full-time Staff by Occupational Category, Gender and Race/Ethnicity</td>
</tr>
<tr>
<td><strong>IPEDS HR Part H</strong> - Number of Newly Hired Permanent Instructional Staff by Tenure Status, Gender and Race/Ethnicity</td>
</tr>
</tbody>
</table>

Definitions provided in [IPEDS Report Descriptions & Data Definitions](#) guidance document
# IPEDS HR Reports: Cognos Requires Review Errors

## IPEDS HR 2020

### Part B - Number of full-time non-instructional staff by occupational category, gender, and race/ethnicity

<table>
<thead>
<tr>
<th>Male</th>
<th>Nonresident alien</th>
<th>Student and Academic Affairs and Other Education Service Occupations</th>
<th>Management Occupations</th>
<th>Business and Financial Operations Occupations</th>
<th>Computer, Engineering and Science Occupations</th>
<th>Community, Social Service, Legal, Arts, Design, Entertainment, Sports, and Media Occupations</th>
<th>Requires Review</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Male</td>
<td>Hispanic/Latino</td>
<td>18</td>
<td>2</td>
<td>2</td>
<td>20</td>
<td>7</td>
<td>1</td>
<td>202</td>
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<tr>
<td></td>
<td>American Indian or Alaska Native</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>7</td>
</tr>
<tr>
<td></td>
<td>Asian</td>
<td>1</td>
<td>3</td>
<td>47</td>
<td></td>
<td>2</td>
<td>3</td>
<td>125</td>
</tr>
<tr>
<td></td>
<td>Black or African American</td>
<td>115</td>
<td>12</td>
<td>14</td>
<td>73</td>
<td>30</td>
<td></td>
<td>2,047</td>
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<tr>
<td></td>
<td>Native Hawaiian or Other Pacific Islander</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>5</td>
</tr>
<tr>
<td></td>
<td>White</td>
<td>149</td>
<td>69</td>
<td>65</td>
<td>472</td>
<td>134</td>
<td>5</td>
<td>3,183</td>
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<tr>
<td></td>
<td>Two or more races</td>
<td>8</td>
<td>1</td>
<td>1</td>
<td>9</td>
<td>2</td>
<td>52</td>
<td>52</td>
</tr>
<tr>
<td></td>
<td>Race and ethnicity Unknown</td>
<td>11</td>
<td>1</td>
<td>3</td>
<td>36</td>
<td>7</td>
<td></td>
<td>231</td>
</tr>
<tr>
<td>Male</td>
<td>Total</td>
<td>303</td>
<td>65</td>
<td>88</td>
<td>701</td>
<td>191</td>
<td>12</td>
<td>5,901</td>
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<tr>
<td>Female</td>
<td>Nonresident alien</td>
<td>3</td>
<td>38</td>
<td></td>
<td></td>
<td>4</td>
<td>1</td>
<td>72</td>
</tr>
<tr>
<td>Female</td>
<td>Hispanic/Latino</td>
<td>45</td>
<td>1</td>
<td>9</td>
<td>15</td>
<td>10</td>
<td>2</td>
<td>308</td>
</tr>
<tr>
<td>Female</td>
<td>American Indian or Alaska Native</td>
<td>3</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1</td>
</tr>
<tr>
<td>Female</td>
<td>Asian</td>
<td>19</td>
<td>1</td>
<td>2</td>
<td>91</td>
<td>4</td>
<td>2</td>
<td>238</td>
</tr>
<tr>
<td>Female</td>
<td>Black or African American</td>
<td>370</td>
<td>19</td>
<td>63</td>
<td>97</td>
<td>47</td>
<td></td>
<td>3,930</td>
</tr>
</tbody>
</table>

**Total**

- Male: 5,901
- Female: 3,930
- Total: 9,831
IPEDS HR Reports: Cognos
Requires Review Errors

Employees in the ‘Requires Review’ column do not fit the definition of any IPEDS occupational category and will not appear in the IPEDS HR Survey upload file unless the job code or activity percent distributions are changed.
IPEDS HR Reports:
Uploading files to NCES

https://surveys.nces.ed.gov/IPEDS

Upload files are generated from HR Cognos reports, then uploaded to NCES

RPA will upload to NCES site on 12/09, and again 1/15 (intermediate uploads must be requested by institution)
Digest HR Reports

- Starting **December 20**, Digest HR Reports are emailed every two weeks during the validation period to reflect changes.
- Definitions provided in [Digest Data Definitions](#) guidance document
- Final reports posted on [Faculty Data](#) website
OneUSG HRDM Refresh Process

Data lag between PeopleSoft and Cognos

- HCM update: Monday, 5pm
- Cognos update: Wednesday, 8 am

Data lag between PeopleSoft and NCES website

- Dec. 9, 2020 & Jan. 15, 2020
  - Uploads for all institutions
- After Dec. 9, 2020
  - Uploads by request
2020 changes

• No changes from NCES on the IPEDS survey

• Extraction & Report changes
  – Classification of Instructional Program (CIP)
  – Multiple Components of Pay (MCOP)
  – 9/10-month contract
  – Funding and Effort
  – Citizenship
  – Gender
2020 changes

CIP

- NCES CIP codes were updated in 2020. Teaching CIPs will need to be updated in PeopleSoft.
- Will not impact IPEDS/Digest.

MCOP

- Administrative supplement MCAFA will be added to base pay for administrative faculty.
- Will impact IPEDS/Digest reported salary.
2020 changes

9/10 Month Contract

- Previously, instructional staff that are not on 12-month contracts have been reported to IPEDS with contract length of 10 months. This is being changed to 9 months.

- This change stems from institutional feedback and allows for a more accurate calculation of ‘9 Month Equated’ Salary Outlays by IPEDS.

- Annual salary calculated as usual. No impact on Digest HR Reports.

- If an institution believes that 10 months is a better representation of contract length they will need to:
  - Confirm rationale with their HR department
  - Send an email to HelpDesk requesting the change
  - RPA will work with you to create new upload file

- **NOTE:** COGNOS REPORTS WILL NOT CHANGE. COGNOS WILL SHOW EMPLOYEES IN THE 9 MONTH CATEGORY EVEN IF A 10 MONTH EXCEPTION IS GRANTED.
2020 changes

Funding and Effort

• Pull from top of stack with an effective date earlier than or equal to November 1, 2020.
• Will impact designation of Instructional Staff for IPEDS. No impact on Digest.

Citizenship

• Pull from top of stack with an effective date earlier than or equal to November 1, 2020.
• Will impact designation of Race for IPEDS. No impact on Digest.

Gender

• If Gender is not specified:
  • Will show as ‘unknown’ on Cognos IPEDS HR.
  • As done in past years, will be reported as female in IPEDS
  • Will report as female in Digest Reports *new*
Guidance
Guidance

Data Validations: Service Now Tickets

Questions about HR data discrepancy issues? Submit an ITS Help Desk Ticket (helpdesk@usg.edu)

Email to helpdesk

Subject: 2020 HRDM Data Validations

Be sure to include:
• Brief description of the data issue/discrepancy
• Provide emplsids and names as examples
• Provide screenshot of issue (if necessary)
• DO NOT include SSNs
Guidance
Website Redesign:

https://www.usg.edu/research/reporting_resources/hrdm_data

2019 documents archived here!
Guidance: Website Redesign

2020 HR IPEDS AND DIGEST

Presentations

• This section will contain this presentation

IPEDS

• Schedule, Report Descriptions, and Definitions
• Cognos User Guide
• BCAT Crosswalk
• How to handle Requires Review

Digest

• Schedule, Report Descriptions, and Definitions
Guidance: Website Redesign

2020 CHANGES

Contains guidance documents for each of the 2020 changes

- Citizenship
- Multiple Components of Pay (MCOP)
- CIP
- Funding and Effort (Assigned Effort)
- 9/10 month contract
- Gender
Guidance

OneUSG Job Aids

New Location:

https://usg.service-now.com/usgsp?id=kb_article_view&sysparm_article=USGKB0011977&sys_kb_id=633c0980db0a6010ee065cb8dc9619bb&spa=1

*NOTE: You will need to log in with your SSO credentials to access the job aids information
Q&A, Contact Info

For access and data validation questions or issues send an e-mail to HelpDesk.

The subject line “2020 HRDM Data Validations” will route your questions faster!

Additional Questions:
Rachana.bhatt@usg.edu