

IPEDS Update

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Research and Policy Analysis



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Fall 2018 IPEDS Cycle

- Job well done!
- Coordinator lock date October 31st
- Tweaks
- Observations
- Prior Year



- Job well done! All institutions were locked by 4:59PM on October 17th
- Coordinator lock data is Wednesday, October 31st
- A few Tweaks made to the Fall's surveys:
 - Completions survey - Excluded CIP 34.xxxx programs. This CIP is recognized for programs that only support a student's personal enrichment. Per IPEDS, programs of this type are typically not for credit toward a formal award such as a degree, program of study, or certificate.
 - 12-month Enrollment survey - Updated logic to only use the student's Banner PIDM, while being concatenated with the institution's SETID, as opposed to using only the STUDENT_ID (SSN). Prior years, several institutions reported having duplicate IDs for the same student, often resulting from changing SSNs in Banner.
 - 12-month Enrollment survey - Updated logic for Part B to include INSTRUCTION_LEVEL = '80' for 'GR'. This is the professional level that has been reported in previous collections under Part A; however, not for Part B in error.
- Some observations after uploading the surveys:
 - For both the 12-month Enrollment survey and Completions survey:
 - Unknown race indicator – the 'unknown/undeclared' indicator = Y is

only reflected in the ADC (and IPEDS) if nulls are reported for race and ethnicity.

- New ethnicity race indicator – As a reminder, if in the New Ethnicity code 'Hispanic or Latino' is selected, that will always result in the IPEDS data as 'Hispanic', regardless of what's entered in Banner for Race.
- For the 12-month Enrollment survey - To exclude students who are exclusively auditing classes, student level must be reported as 52 or 90
- Again, for the 12-month Enrollment survey – We should not include students who are studying abroad. We will work on this for next year.
- A reminder for Prior Year submission, that after October 31st, necessary changes to the Fall 2018 IPEDS data can be updated next Fall. If that's the case for you, have your documentation together so to email us next Fall when Prior Year is open.

Winter 2018 IPEDS Cycle

- Opens Dec. 12th
 - Student Financial Aid
 - Graduation Rates
 - 200% Graduation Rates
 - Admissions (*self reports*)
 - Outcome Measures



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- REVIEW SLIDE
- You all will receive a few emails from me, especially when your Winter uploads to IPEDS are complete and Winter detail files available on MOVEit.

Winter 2018 IPEDS Cycle

- Student Financial Aid
 - Tuition & Fee Waivers



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- This is not a recent change conducted by NCES.
 - Last year, paid Tuition and Fee Waivers were added. However, these amounts were only submitted for the FTFT students awarded financial aid (known as Group 2).
 - For this year, we anticipate also reporting paid Tuition and Fee Waivers to all undergraduates (known as Group 1). *This is Part B, Line 01 "Grant or scholarship aid from the federal government, state/local government, the institution, and other sources known to the institution (except loans)."*
 - This will include Dual Enrollment (waivers)
 - This was overlooked last year do to the IPEDS Help Desk only informing us to apply these amounts to FTFT students.

Group 2: We should anticipate that the Net Price (average) on College Navigator will reflect more positively for 2017-18 (e.g. lowering the Net Price) . The increased amount of aid submitted for Group 2 (because of including Waivers) will lower the net (average) amount after deducting from the 2017-18 estimated expenses (submitted in the 2017-18 IC survey).

Group 1: As we include these paid waivers for Group 1, in the future, the College

Navigator will reflect the headcounts and amounts under All Undergraduate Students for 1) Number Receiving Aid, 2) Percent Receiving Aid, 3) Total Amount of Aid Received, 4) Average Amount of Aid Received.

Winter 2018 IPEDS Cycle

- Outcome Measures
 - Corrections
 - Enhancements



- Corrections: Our programmers are looking into a few discrepancies reported to us last year. Those include:
 - Some students incorrectly placed in First-time Freshman cohort when the student's IPEDS Transfer Indicator = Y in the USG data.
 - Also, one student was incorrectly counted in the Full Year Cohort for enrollment in trailer summer term; however, this student continued their enrollment in the following Fall and Spring; therefore, they should not have been counted in the Full Year Cohort, but the next year's cohort.
- Enhancement:
 - We anticipate including in the upload, the headcounts for the 'number who enrolled at another institution after leaving your institution' of each of the 8 sub-cohorts. This will replace the manual data entries onto the form you complete from the pivot table I provide you over MOVEit.

Winter 2018 IPEDS Cycle

- Graduation Rates
 - Corrections
 - Enhancements



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- Corrections: Our programmers are looking into a few discrepancies reported to us last year. Those include:
 - Why the race/ethnicity and gender headcounts were not included in last year's upload for column 18 – Bachelor sub-cohort of full-time, first-time students, those completed bachelor's degree within 150%.
 - Also, when multiple awards with separate award terms exist for a student, the earliest award term is not utilized. Often, the most recent award term is utilized when determining if the student completed the degree within 150%
Columns 11, 12, 18, 19, 20, 29
- Enhancement:
 - We anticipate including in the upload, the 'Transfer-Out' student headcounts in column 30 for the gender and race data fields. This will replace the manual data entries onto the form you complete from the pivot table I provide you over MOVEit.

IPEDS 2017-18 Finance Follow-up

IPEDS identifying Finance and Student Financial Aid surveys differences.



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For the institutions not involved, you may not have a full understanding of my email delivered on June 29th.

Several of you received a follow-up message regarding a post-data collection review from IPEDS in June identifying differences between the Student Financial Aid survey and the Finance survey (e.g. Follow-up on the IPEDS 2017-18 Finance data collection).

As you are aware, the Student Financial Aid and Finance surveys may not always be in sync. They are reported at different times – SFA in the Winter, FA in the Spring. Also, the SFA reports aid awarded while the FA survey reports amount paid.

So, at first impression, we assumed it involved the addition of the paid tuition and fee waivers in the Student Financial Aid survey. The emails from IPEDS to the institutions did not provide enough specifics. So, I started giving out instructions on your revisions without knowing for sure if any of it would put you in the clear.

IPEDS 2017-18 Finance Follow-up

IPEDS was identifying differences (e.g. “exceeds”) of your institution’s total grant/scholarship aid awarded in the Student Financial Aid component when compared to the scholarship/fellowship revenue reported in the Finance component, was newly introduced in the 2017-18 (winter) collections.



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However, as I continued to work with the various offices on campus and emailing the IPEDS help desk, we concluded that IPEDS was identifying differences (e.g. “exceeds”) of your institution’s total grant/scholarship aid awarded in the Student Financial Aid component when compared to the scholarship/fellowship revenue reported in the Finance component. Well, that should be the case, SFA is aid awarded versus the FA survey being aid paid.

The screenshot displays two forms side-by-side. The left form is the 'Part E - Scholarships and Fellowships' section of the Finance Survey for the fiscal year July 1, 2016 - June 30, 2017. It contains a table with the following data:

Line No.	Scholarships and Fellowships	Current year amount	Prior year amount
01	Fed grants (Federal)	5,242,330	6,166,630
02	Other federal grants (Do NOT include FDSL amounts)	183,272	163,213
03	Grants by state government	0	0
04	Grants by local government	0	0
05	Institutional grants from restricted resources	35,560	203
06	Institutional grants from unrestricted resources (CV-510-511* -512)	0	613,604
07	Total revenue that funds scholarships and fellowships	5,421,933	6,882,450
Discounts and Allowances			
08	Discounts and allowances applied to tuition and fees	2,575,979	2,125,496
09	Discounts and allowances applied to sales and services of auxiliary enterprises	0	0
10	Total discounts and allowances (CV-510-510)	2,575,979	2,125,496
11	Net scholarships and fellowships expenses after deducting discounts and allowances (CV-510-510) This amount will be carried forward to C10 of the expense section.	2,845,953	4,746,954

The right form is the 'Student Financial Aid' form, Section I: Part B. It includes a table for 'Information from Part A: Group 1 Undergraduate Students' for Fall 2016:

Aid Type	Number of Group 1 students who were awarded aid	Percentage of Group 1 students who were awarded aid	Total amount of aid awarded to Group 1 students	Average amount of aid awarded to Group 1 students
Grant or scholarship aid from the federal government, state/local government, the institution, and other sources known to the institution (Do NOT include federal student loans)	1,468	59	7,379,206	5,033
07 Zell Grants	1,348	55	6,479,393	4,814
03 Federal student loans	814	33	4,036,094	4,969

A red arrow points from the value '5,421,933' in the Finance Survey table to the value '2,468' in the Student Financial Aid table.

These are the separate fields IPEDS was comparing - The revenue reported for the Finance survey's Scholarships and Fellowships and the undergraduate grant or scholarship aid awarded. Attention was placed largely on the HOPE and Zell scholarships and Tuition & Fee waiver amounts reported in the Finance Survey.

What I came to realize, several business offices report aid HOPE and Zell, and tuition & fee waivers under Discounts and Allowances (below the Revenue portion of the survey). Even though IPEDS informed me and the institutions these amounts belong on Line 5 (Institutional grants from restricted resources). This contributed to why several institutions were notified – These institutions reported and have always reported these amounts as a “pass-thru” not as revenue, per their guidelines.

So I called the IPEDS help desk for some straight answers. I learned that the logic used in identifying these differences was newly introduced in the 2017-18 collections. We nor you received any communication that this was going to happen. They also informed me that this was requested by NCES. However, the help desk did not understand the intentions of this new post-data review. They said they will be seeking additional guidance from the NCES.

Since it's been 4 months now and Winter reporting is approaching, I will follow up with IPEDS and hope to get back to you all soon.

In the meantime, there should be some orchestrated efforts on campus and system-wide to uncover what is the right way to report these amounts in the Finance Survey (revenue or pass-thru?).

Housekeeping

- Manual changes to your IPEDS data
 - Document
 - Email me
- Report requests (e.g. FTF)
- Gateway to Completion
 - FY2018
 - Institution's responsibilities



- Manual changes to your IPEDS that was uploaded should be reported to us. Just document your change for your records and email me this information for your justification.

Contact

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HRDM Data Validations – Timeline

- Week of October 22 – Respond to Pre-Nov. 1 inquiries
- October 30 – 2018 HRDM Data Validations Kick-Off Webinar
- November 1 Snapshot
 - All institutions (except Augusta, Georgia Tech, and UGA) live on PeopleSoft HCM
 - HR IPEDS Reports are ready for review in Cognos
 - HR Digest Reports produced and shared (via listserv); bi-weekly updates
- December 12 – HR IPEDS survey data available on NCES site



HRDM Data Validations – Timeline

- Nov. 1 – Jan. 16 – Validation and correction; reminders to CHRO and HRDM POCS on Nov. 1
- January 16, 2019 – Deadline for all campus changes
- January 17, 2019 - Snapshot frozen. Data final
 - IPEDS reports will be run, uploaded, & locked by institutions. MAY NOT BE CHANGED
 - HRDM reports run for legislature and other inquiries



HRDM Data Validations – More Information

- Big thanks to institutions who helped with validating their **pre-Nov. 1** HR Detail files
- **TWO tentative** December 2018 OneUSG Blackout Periods:
 - 12/7 at 5 pm TO 12/12 at 7 am
 - 12/21 at 5 pm TO 12/27 late PM or 12/28 early AM
- HRDM Data Validations and IPEDS Guidance Documents - https://www.usg.edu/research/reporting_resources

Reporting Resources

This page contains information that may be useful to data entry practitioners and institutional research professionals.

Academic Reporting Resources

- [Data Element Dictionary with Valid Values](#)
- [Data Element Dictionary Business Processes](#)
- [Data Element Dictionary Derived Field Appendix A & B](#)
- [New Data Element Request Form](#)
- [Update to Existing Data Element Request Form](#)
- [Ending an Attribute in Banner](#)

Administrative Reporting Resources

- [HR Data Element Dictionary with Valid Values](#)
- [HR Data Element Dictionary Business Processes](#)
- [HRDM Data Validations and IPEDS Guidance Documents](#) ❖ [3rd link](#)

HRDM Data Validations and Guidance Documents

FUNCTIONAL DOCUMENTS +

TECHNICAL DOCUMENTS -

- [Fall 2018 HRDM Digest Reports Definitions](#)
- [IPEDS HRDM Survey Report Definitions](#)



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HRDM – OneUSG

- Remaining Non-USG institutions:
 - UGA – Cutover in December 2018
 - Augusta University – Cutover in June 2019
 - Georgia Tech – Cutover in January 2020
- 1st Phase of HRDM DED project – COMPLETED and included:
 - HRDM elements' DATA SOURCE information updated to reflect PeopleSoft HCM tables and fields names
 - Cognos version of DED
 - PDF version DED

(https://www.usg.edu/research/reporting_resources/)



HRDM – OneUSG

- 2nd Phase of HRDM DED project – TBD and will include:
 - Working with HR Data Governance Group (with institutional representation and **collaboration** with IR, HR and MFE Groups) to come up with:
 - Definitions for **non**-IPEDS HR & MFE HRDM elements
 - Review and update Business Practices for HRDM elements
 - Other Phase 2 work will include: Governance of data elements not approved
 - See **attached list** of proposed HR Data Governance Group membership



Microsoft Word
Document



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