

IPEDS Update

Patrick Harris and Rachana Bhatt

Research and Policy Analysis



Fall 2021 IPEDS Cycle

- Keyholder lock date was October 13th
- Coordinator lock date will be October 27th
- Fall Survey updates:
 - Completions
 - 12-month Enrollment
 - Institutional Characteristics
- Prior Year



Winter 2021 IPEDS Cycle

- Keyholder access December 8th (closes Feb. 9)
- Winter Survey updates:
 - Graduation Rates
 - 200% Graduation Rates
 - Outcome Measures
 - Student Financial Aid
 - Admissions (*self reports*)

Spring 2022 IPEDS Cycle

- Spring Survey updates:
 - Fall Enrollment
 - Human Resources
 - Finance (*self reports*)
 - Academic Libraries (*self reports*)



Changes to the 2021-22 IPEDS Data Collection

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



Student Financial Aid

HEERF (Higher Education Emergency Relief Fund)





Angela Bell

Institutional Research and Planning; FINAID-L@LISTSERV.UGA.EDU; CBO-L@LISTSERV.UGA.EDU; Patrick Harris ▾

📎 1

12/7/2020

CARES emergency grant guidance for IPEDS Financial Aid

i You replied to this message on 12/10/2020 12:12 PM.



SFA_Guidance.pdf
357 KB

[Bing Maps](#)

+ Get more apps

Greetings,

Please find attached guidance on adding in CARES emergency grants to students in the Winter IPEDS Financial Aid Survey. Because CARES funds were awarded by different methods across institutions, USG did not collect CARES funds in the 2019-20 USG Financial Aid Data Collection. Therefore, CARES funds must be added in manually by institutions where required by IPEDS using the attached guidance and files provided via MOVEit. The MOVEit files (which your Institutional Research staff can access) will help determine if a CARES student should be added in the IPEDS item because he/she has not received other aid in the category. CARES dollars need to be supplied in all designated fields.

Because CARES was awarded either via financial aid disbursements or application to student accounts, campus IPEDS keyholders need to work with those offices (copied) to get CARES awards information. The attached guidance indicates the method each campus used according to a survey earlier this fall.

We will upload IPEDS survey data and MOVEit files the week of December 14th. The IPEDS Financial Aid survey locking deadline is February 10th.

IPEDS Keyholders, please respond to Patrick Harris (PatrickHarris@usg.edu) by Thursday, December 10th that you have received this guidance; Patrick is happy to assist you in this task.

Thank you in advance for your efforts.

Sincerely,
Angie Bell

Angela Bell, Ph.D.
Vice Chancellor of Research and Policy Analysis
Board of Regents of the University System of Georgia
270 Washington Street, SW
Atlanta, GA 30334
Ph: 404-962-3069

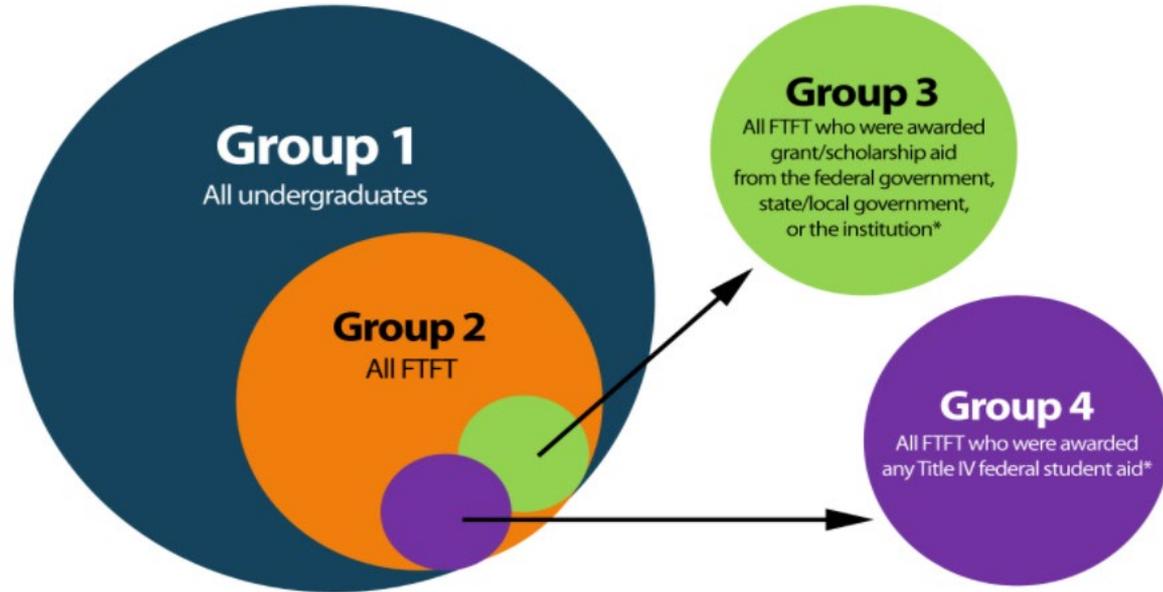


UNIVERSITY SYSTEM OF GEORGIA



Student Financial Aid

HEERF (Higher Education Emergency Relief Fund)





Student Financial Aid

HEERF (Higher Education Emergency Relief Fund)

Section 1: Part A

Part A - Establish Your Groups

Reporting Reminders:

- Part A establishes the number of students in various groups. Note that the numbers on this screen will be carried forward to other parts of the Student Financial Aid component.
- In the fields below, report the number of students in each of the following groups.

		Fall 2020	YOUR PRIOR YEAR DATA
			Fall 2019
01	Group 1 All <u>undergraduate</u> students	<input type="text"/>	
02	Group 2 Of those in Group 1, those who are <u>full-time, first-time</u> degree/certificate-seeking	<input type="text"/>	
02a	Of those in Group 2, those who were awarded any <u>Federal Work Study, loans to students</u> , or grant or scholarship aid from the federal government, state/local government, the institution, or other sources known to the institution	<input type="text"/>	<div style="border: 1px solid blue; padding: 5px; width: fit-content;"> Add in HEERF-only FTFT students on top of the headcount already displayed </div>
02b	Of those in Group 2, those who were awarded any <u>loans to students</u> or grant or scholarship aid from the federal government, state/local government, or the institution	<input type="text"/>	
03	Group 3 Of those in Group 2, those <u>paying the in-state or in-district tuition rate</u> who were awarded grant or scholarship aid from the federal government, state/local government, or the institution	<input type="text"/>	
04	Group 4 Of those in Group 2, those <u>paying the in-state or in-district tuition rate</u> who were awarded any <u>Title IV federal student aid</u>	<input type="text" value="X"/>	



Student Financial Aid

HEERF (Higher Education Emergency Relief Fund)

Section 1: Part B

Part B - Enter Information About Group 1

Reporting Reminders:

- Group 1 students are **ALL undergraduate** students (including first-time students) enrolled in Fall 2020.
- For this part, report:

For These Students	The Following Type(s) of Aid	Awarded in This Period
<ul style="list-style-type: none"> All undergraduate students enrolled in Fall 2020 	<ul style="list-style-type: none"> Grant or scholarship aid from: <ul style="list-style-type: none"> federal government state/local government the institution other sources known to the institution Loans to students from: <ul style="list-style-type: none"> the federal government 	<ul style="list-style-type: none"> Any time during academic year 2020-21

- In the fields below, report the number of Group 1 students and the total amount of aid awarded to these students for each type of aid.

Information from Part A	Fall 2020
Group 1: All undergraduate students (This number is carried forward from Part A, Line 01.)	

Aid Type	2020-21			
	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
01 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)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
02 Pell Grants	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
03 Federal student loans	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Add in HEERF-only undergraduates on top of the headcount already displayed

Add in ALL the HEERF paid funds to undergraduates on top of the amount already displayed

Section 1: Part B, about Group 1 (Fall 2020 undergraduates)

October 27, 2021



Student Financial Aid

HEERF (Higher Education Emergency Relief Fund)

Aid Type		Fall 2020				YOUR PRIOR YEAR DATA
		Number of Group 2 students who were awarded aid	Percentage of Group 2 students who were awarded aid	Total amount of aid awarded to Group 2 students	Average amount of aid awarded to Group 2 students	Average amount of aid awarded to Group 2 students
01	Grants or scholarships from the federal government, state/local government, or the institution	<input type="text"/>				
02	<u>Federal grants</u>	<input type="text"/>				
02a	<u>Pell Grants</u>	<input type="text"/>		<input type="text"/>		
02b	<u>Other federal grants</u>	<input type="text"/>		<input type="text"/>		
03	<u>State/local government grants or scholarships</u> (includes <u>fellowships</u> /tuition waivers/exemptions)	<input type="text"/>		<input type="text"/>		
04	<u>Institutional grants or scholarships</u> (includes <u>fellowships</u> /tuition waivers/exemptions)	<input type="text"/>		<input type="text"/>		
05	<u>Loans to students</u>	<input type="text"/>				
05a	<u>Federal loans</u>	<input type="text"/>		<input type="text"/>		
05b	<u>Other loans (including private loans)</u>	<input type="text"/>		<input type="text"/>		

Add in HEERF-only FTFT students on top of the headcount already displayed

Add in ALL the HEERF paid funds to FTFT students on top of the amount already displayed

Section 1: Part C, about Group 2 (Fall 2020 FTFT students)

October 27, 2021



Student Financial Aid

HEERF (Higher Education Emergency Relief Fund)

Information from Part A:		YOUR PRIOR YEAR DATA 2018-2019	YOUR PRIOR YEAR DATA 2019-2020	2020-2021
Group 3 Full-time, first-time degree/certificate-seeking undergraduate students paying the in-state or in-district tuition rate who were awarded grant or scholarship aid from the following sources: the federal government, state/local government, or the institution (This number is carried forward from Part A, Line 03)		<input type="text"/>	<input type="text"/>	
01	Report the number of Group 3 students with the following living arrangements:	YOUR PRIOR YEAR DATA	YOUR PRIOR YEAR DATA	
		2018-19	2019-20	2020-21
	01a On-campus	<input type="text"/>	<input type="text"/>	<input type="text"/>
	01b Off-campus (with family)	<input type="text"/>	<input type="text"/>	<input type="text"/>
	01c Off-campus (not with family)	<input type="text"/>	<input type="text"/>	<input type="text"/>
	01d Unknown (calculated) This value is calculated using the following formula: [A03-(D01a+D01b+D01c)]			
02	Report the total amount of grant or scholarship aid from the federal government, state/local government, or the institution awarded to Group 3 students	<input type="text"/>	<input type="text"/>	<input type="text"/>
03	Average grant or scholarship aid from the federal government, state/local government, or the institution awarded to Group 3 students (calculated value). This value is calculated using the following formula: [D02/A03]			

Add in HEERF-only FTFT, in-state rate students in the correct living arrangement on top of the headcount already displayed

Section 1: Part D, about Group 3 (Fall 2020 FTFT students paying in-state rate)

October 27, 2021

Student Financial Aid

HEERF (Higher Education Emergency Relief Fund)

Section 1: Part E, about Group 4

The IPEDS Help Desk explicitly requests that student headcounts for those who only received a HEERF grant, **not be added in Group 4**. HEERF is not considered Title IV aid. The inclusion of it would skew the calculation of Net Price. – IPEDS Help Desk



Student Financial Aid

HEERF (Higher Education Emergency Relief Fund)

Part A: Add in the HEERF-only students in Part A (groups 2 and 3) – Lines 02a, 02b, & 03: *Report HEERF headcounts only*

Part B: Add in the HEERF-only students in Part B (group 1) – Line 01: *Report HEERF headcounts and HEERF \$ amounts*

Part C: Add in the HEERF-only students in Part C (group 2) – Lines 01, 02: *Report HEERF headcounts,*
– Line 02b: *Report HEERF headcounts and HEERF \$ amounts*



Student Financial Aid

HEERF (Higher Education Emergency Relief Fund)

Part D: Add in the HEERF-only students in Part D (group 3)
– Lines 01a, 01b, 01c: *Report HEERF headcounts only*

Part E: Do nothing (group 4).
HEERF is not considered Title IV aid.

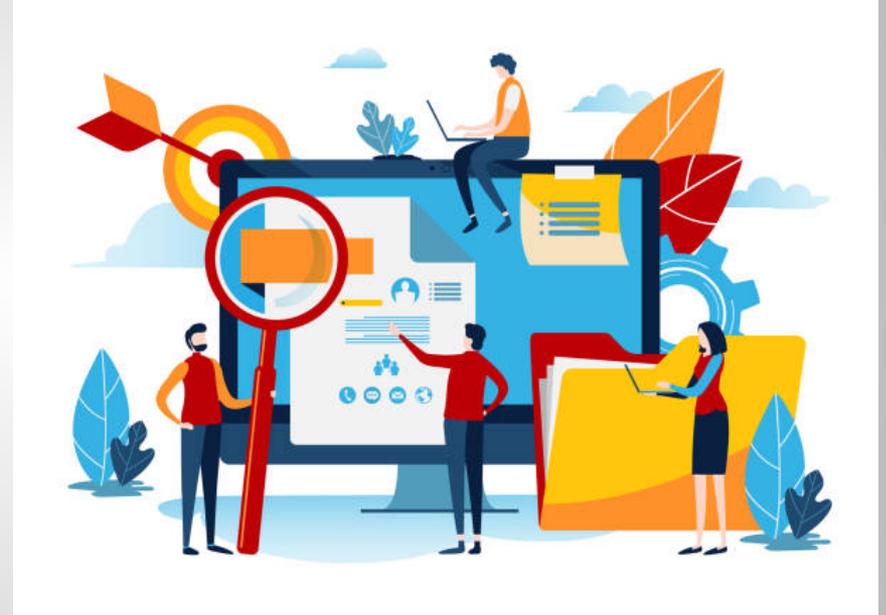


Housekeeping

- Manual changes to your IPEDS data
 - Document
 - Email me
- Report requests (e.g., FTF)
- NPC
- New IPEDS Keyholder listserv

HRDM 2021

- ❖ Reorganized website (again) and updated HR Resource documents
- ❖ Cognos –
 - ❖ Updated to Cognos 11
 - ❖ Updated Cognos IPEDS reports to better match NCES IPEDS layouts – Available Nov. 3



HRDM 2021

Website Updates

HRDM Data and IPEDS HR Guidance Documents

2021 HRDM PRESENTATION, IPEDS HR AND DIGEST HR

Presentations

- HRDM Data Validation Presentation - Coming Soon!
This webinar reviews the logistics, timeline, and important dates for the HR data validation period.

IPEDS

- [IPEDS HR Data Validation Schedule](#) 
- Cognos User Guide - Coming Soon!
This document serves as the user guide for running the Cognos IPEDS Human Resources reports.
- Report Descriptions and Data Definitions - Coming Soon!
This document contains the USG Cognos Report Definitions on the IPEDS Human Resources Survey.
- [BCAT SOC Crosswalk](#) 
This document is the updated BCAT SOC crosswalk table for Fall 2021 reporting.
- How to Handle Requires Review - Coming Soon!
This document provides guidance on how to work employee records flagged with a "Requires Review" status on the

ARCHIVED HRDM GUIDANCE DOCUMENTS

Year	Presentation	IPEDS	Digest	Changes
2020	<ul style="list-style-type: none"> • 2020 HRDM Data Validations Presentation  	<ul style="list-style-type: none"> • 2020 IPEDS Data Validation Schedule  • 2020 IPEDS HRDM Survey Report Definitions  • 2020 Cognos User Guide  • 2020 SOC BCAT Crosswalk  • 2020 How to handle Requires Review  	<ul style="list-style-type: none"> • 2020 Digest HR Data Validations Schedule  • 2020 HRDM Digest Reports and Definitions  • USG Faculty Definitions  	<ul style="list-style-type: none"> • Citizenship Change  • MCOP Change  • CIP Change  • Funding and Effort Change  • Unknown Gender  • Contract Length Change 



HRDM 2021 Cognos Updates

The screenshot shows the IPEDS HR Survey Reports for: 2020-21 interface. The top navigation bar includes 'IPEDS HR Home Tabs'. The main content area is titled 'IPEDS HR Survey Reports for: 2020-21' and includes instructions: 'First, select an Institution. Next, click on a report link below to view results.' An orange arrow points from the top right towards the 'For Help' link.

For Help: [HRDM Data and IPEDS HR Guidance Documents](#)

Institution: (All) [v]

Staff DG FT 15 or more

- [FT Instructional 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](#)
- FT by primary function**
- [C - FT Summary Non-medical school staff](#) (reference only - IPEDS generated)
- [C - FT Summary Medical school staff](#) (reference only - IPEDS generated)

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 All](#)
- [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)

Staff DG New Hires

- [H - New Hires Instructional, Tenure](#)
- [H - New Hires, Occupation - 1](#)
- [H - New Hires, Occupation - 2](#)
- [H - New Hires All](#)
- [H - New Hires, Occupation - 3](#)

Detail files

- [HR Detail](#)
- [IPEDS HR Detail](#)

Requires Review: [71](#)
*Review Parts B, D, E, G and H

Gender Unknown: [338](#)

Legend:
DG = Degree Granting
FT / PT = Full-Time / Part-Time
IS = Instructional Staff

Annotations: Orange circles highlight 'Staff DG FT 15 or more' and 'B1 - FT Non-instructional, Occupation - 2'. Orange arrows point to the 'IPEDS HR Home Tabs' and 'IPEDS HR Detail' links.

HRDM 2021

- ❖ HRDM data validations will open November 1st, 2021 for the 2021 collection
- ❖ No changes to the IPEDS survey this year, please review the numerous 2020 changes
- ❖ Help desk tickets for changes to the HRDM listserv or Cognos access

Email to helpdesk

**Subject: 2021 HRDM
Data Validations**

- **Be sure to include:**
 - Brief description of the data issue/discrepancy
 - Provide emplids OR names as examples
 - Provide screenshot of issue (if necessary)
 - DO NOT include SSNs





Questions?

Patrick Harris
(IPEDS Questions)

Patrick.Harris@usg.edu

Leslie Hodges

Leslie.Hodges@usg.edu