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 8\textsuperscript{th} (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)
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)
### 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.

<table>
<thead>
<tr>
<th>Group</th>
<th>Description</th>
<th>Fall 2020</th>
<th>Prior Year Data</th>
</tr>
</thead>
<tbody>
<tr>
<td>01</td>
<td>All undergraduate students</td>
<td></td>
<td></td>
</tr>
<tr>
<td>02</td>
<td>Of those in Group 1, those who are full-time, first-time degree/certificate-seeking</td>
<td></td>
<td></td>
</tr>
<tr>
<td>02a</td>
<td>Of those in Group 2, those who were awarded any Federal Work Study, loans to students, or grant or scholarship aid from the federal government, state/local government, the institution, or other sources known to the institution</td>
<td></td>
<td></td>
</tr>
<tr>
<td>02b</td>
<td>Of those in Group 2, those who were awarded any loans to students, or grant or scholarship aid from the federal government, state/local government, or the institution</td>
<td></td>
<td></td>
</tr>
<tr>
<td>03</td>
<td>Of those in Group 2, those paying the in-state or in-district tuition rate who were awarded grant or scholarship aid from the federal government, state/local government, or the institution</td>
<td></td>
<td></td>
</tr>
<tr>
<td>04</td>
<td>Of those in Group 2, those paying the in-state or in-district tuition rate who were awarded any Title IV federal student aid</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- Add in HEERF-only FTF students on top of the headcount already displayed.
### Student Financial Aid

**HEERF (Higher Education Emergency Relief Fund)**

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

**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:
  - All undergraduate students enrolled in Fall 2020
  - Grant or scholarship aid from:
    - Federal government
    - State/local government
    - Institution
    - Other sources known to the institution
    - Loans to students from:
      - Federal government
      - 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.**

<table>
<thead>
<tr>
<th>Aid Type</th>
<th>Number of Group 1 students who were awarded aid</th>
<th>Percentage of Group 1 students who were awarded aid</th>
<th>Total amount of aid awarded to Group 1 students</th>
<th>Average amount of aid awarded to Group 1 students</th>
</tr>
</thead>
<tbody>
<tr>
<td>01</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>02</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>03</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

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

October 27, 2021
Student Financial Aid
HEERF (Higher Education Emergency Relief Fund)

<table>
<thead>
<tr>
<th>Aid Type</th>
<th>Fall 2020</th>
<th>YOUR PRIOR YEAR DATA</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Number of Group 2 students who were awarded aid</td>
<td>Percentage of Group 2 students who were awarded aid</td>
</tr>
<tr>
<td>01</td>
<td>Grants or scholarships from the federal government, state/local government, or the institution</td>
<td></td>
</tr>
<tr>
<td>02</td>
<td>Federal grants</td>
<td></td>
</tr>
<tr>
<td>02a</td>
<td>Fall Grants</td>
<td></td>
</tr>
<tr>
<td>02b</td>
<td>Other federal grants</td>
<td></td>
</tr>
<tr>
<td>03</td>
<td>State/local government grants or scholarships</td>
<td>(Includes fellowships/tuition waivers/exemptions)</td>
</tr>
<tr>
<td>04</td>
<td>Institutional grants or scholarships</td>
<td>(Includes fellowships/tuition waivers/exemptions)</td>
</tr>
<tr>
<td>05</td>
<td>Loans to students</td>
<td></td>
</tr>
<tr>
<td>05a</td>
<td>Federal loans</td>
<td></td>
</tr>
<tr>
<td>05b</td>
<td>Other loans (including private loans)</td>
<td></td>
</tr>
</tbody>
</table>

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

October 27, 2021
# Student Financial Aid
## HEERF (Higher Education Emergency Relief Fund)

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

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Group 3</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>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)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>01</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Report the number of Group 3 students with the following living arrangements:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>01a</strong></td>
<td>On-campus</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>01b</strong></td>
<td>Off-campus (with family)</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>01c</strong></td>
<td>Off-campus (not with family)</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>01d</strong></td>
<td>Unknown (calculated)</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>This value is calculated using the following formula:</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>[A03-D01a+D01b+D01c]</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>02</strong></td>
<td>Report the total amount of grant or scholarship aid from the federal government, state/local government, or the institution awarded to Group 3 students</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>03</strong></td>
<td>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:</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>[D02]*A03]</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Year</th>
<th>Presentation</th>
<th>IPEDS</th>
<th>Digest</th>
<th>Changes</th>
</tr>
</thead>
<tbody>
<tr>
<td>2020</td>
<td>2020 HRDM Data Validation Presentation</td>
<td>2020 IPEDS Data Validation Schedule</td>
<td>2020 Digest HR Data Validations Schedule</td>
<td>Citizenship Change</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2020 IPEDS HRDM Survey Report Definitions</td>
<td>2020 HRDM Digest Reports and Definitions</td>
<td>MCOP Change</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2020 Cognos User Guide</td>
<td>2020 USG Faculty Definitions</td>
<td>OIP Change</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2020 SOC BCAT Crosswalk</td>
<td>2020 How to handle Requires Review</td>
<td>Funding and Effort Change</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Unknown Gender</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Contract Length Change</td>
</tr>
</tbody>
</table>
HRDM 2021
Cognos Updates

IPEDS HR Survey Reports for: 2020-21
First, select an institution. Next, click on a report link below to view results.

Staff DG FT 15 or more
- FT Full-Time Employees
- 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, FTE
- A2 - FT Instructional, FTE - Total

FT by primary function
- B1 - FT Non-instructional, Occupation - 1
- B2 - FT Non-instructional, Occupation - 2
- B3 - FT Non-instructional, Occupation - 3
- B4 - FT Non-instructional, Occupation - 4
- H1 - FT Non-instructional, Occupation - 1
- H2 - FT Non-instructional, Occupation - 2
- H3 - FT Non-instructional, Occupation - 3

DT by primary function
- C1 - FT Summary, Non-medical school staff (reference only - IPEDS generated)
- C2 - 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, Occupation - 3
  - D - PT Staff, Occupation - 4
  - D - Graduate Assistants
  - E - PT Staff, Medical School Status - 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
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

UNIVERSITY SYSTEM OF GEORGIA
Questions?

Patrick Harris
(IPEDS Questions)
Patrick.Harris@usg.edu

Leslie Hodges
Leslie.Hodges@usg.edu

Ready for Questions