IPEDS Update

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Research and Policy Analysis

Spring 2024 RACIRP

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2023-24 IPEDS Collection

❖ MOVEit
  ▪ IPEDS – 45 Days
  ▪ Other – 30 Days

As previously announced in the Fall by RPA leadership, an automated cleanup protocol for all RPA folders was established in MOVEit. This protocol was implemented well before the USO mandate as a precautionary measure. To the best of my knowledge, only two institutions reached out to me to obtain your IPEDS detail files after the scheduled 45-day cleanup. So, it seems like the 45 days were long enough.

Winter 2023-24 IPEDS Collection

❖ Student Financial Aid
❖ Graduation Rates
❖ 200% Graduation Rates
❖ Outcome Measures
❖ Admissions

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The **Winter IPEDS collections** opened on December 6th. These surveys underwent minimal modifications as neither the NCES nor the RPA introduced substantial changes. Updates primarily included revised FAQs, rephrased definitions, and enhanced clarifications and details in the instructions.

Postmortem:
For the **Student Financial Aid** survey, the IR office at your institution manually compiled and provided to RPA the HEERF/CARES Act disbursement data collected during the Fall semester. RPA then processed this data and included it in the upload file to IPEDS along with the student-level detail files, consistent with the procedure used over the previous two years. This effort required approximately 50 hours of collaborative effort between RPA and EDMA and was completed by December 7th, just a day after the collection period began.

- However, we encountered a complication with the uploaded data. On January 3rd, it was discovered that several data elements had been added to the IPEDS upload specifications without prior notification to Keyholders and State Coordinators. This oversight led to Fatal Error #7131 due to blank data fields appearing in your edit reports. RPA and EDMA promptly addressed this issue and re-uploaded the corrected survey data on January 11th. I communicated these updates to the Keyholder listserv on the same day.

- The following day, we identified a glitch (error #7821) that affected the reported amounts of federal loans for non-degree-seeking subcohorts, impacting 8 institutions. We quickly resolved this issue, updated the financial aid data on the IPEDS interface, and replaced your Part A Detail File in MOVEit.
- On January 25th, I updated the Keyholders experiencing error #7147, explaining that the primary cause was a decline in the number of federal aid recipients and the amounts awarded. This reduction was directly linked to the gearing-down or discontinuation of CARES Act funding.

Similarly, the **Graduation Rates** and the **200% Graduation Rates** surveys were successfully uploaded to the IPEDS interface, and the respective detailed files were provided on December 7th. These efforts required 28 and 18 hours of effort from EDMA and RPA, respectively. No significant issues were reported.

The **Outcome Measures** survey was uploaded to the IPEDS interface, and detailed files were submitted on December 13th. This survey was completed with 26 hours of effort from EDMA and RPA, and again, no issues were reported by institutions.

Lastly, the **Admissions** survey was directly managed on campus by you and your colleagues,

Spring 2023-24 IPEDS Collection

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

* Leslie's update
** Institutions' responsibility

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The **Spring IPEDS** surveys featured only minor modifications, as neither the NCES nor the RPA introduced significant changes. These updates mainly consisted of revised FAQs, rephrased definitions, and more detailed clarifications and instructions.

Postmortem:
The **Fall Enrollment** survey data was successfully uploaded to the IPEDS interface, and the respective detailed files were also submitted on March 1st. This task required approximately 30 hours of collaborative effort between RPA and EDMA.

- Please remember that since last year's Fall Enrollment survey, we have implemented new logic to exclude students without earned hours when reporting Distance Education data. Consequently, some differences will exist in headcounts between the Winter Collection's Admissions survey and the Spring Collection's Fall Enrollment survey. Similar variations may also appear between some public-facing reports and the Fall Enrollment survey data. I sent a reminder about this last year and again this year as a refresher.

Leslie will soon provide an update on the **Human Resources** survey and discuss its particulars with you.

Lastly, the **Academic Libraries** and **Finance** surveys were directly managed by you and your

colleagues.

As a reminder, if you need to make changes to the Spring IPEDS data based on the prior year's submissions, these can be updated when the IPEDS Prior Year collection opens this December. Please ensure you have all necessary documentation ready to email us when the collection becomes available.

2024-25 IPEDS Collection

❖ **2024-25 changes**?
   (the answer is that we don't know yet)

   However, RPA will review updates and
   communicate procedural changes ASAP!

The proposed 24-25 changes should be finalized and made available online by sometime around IPEDS Registration or early August.
I will keep you all updated.

2024-25 IPEDS Collection

❖ **Completions Survey Award Level Updates**

Education Specialist degree (Ed.S) – Re-alignment from IPEDS Award Level 08 (post-master's certificate) to 07 (Master's degree)

Advanced Certificates (F) - Post-Master's Certificates currently reported as a Post-Bachelor's Certificate (currently with the Data Governance Committee)

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Continuing the 24-25 IPEDS Collections conversation with a focus on the Completions survey:
NCES does not have a classification for Education Specialist Degrees (Ed.S). For years, we have reported those awards as a post-master's certificate. However, recently, when I requested guidance from the IPEDS Help Desk, they recommended that we report Ed.S degrees as Master's Degrees, even though they are considered at a higher level. This update will be in place in time for the 2024-25 IPEDS Collections.

Also, the degree level of Advanced Certificates, currently classified as "post-master's" and reported at the post-bachelor certificate level to the IPEDS Completions survey, is under review. The scope currently includes creating specific certificate levels for each graduate degree level.
Detailed updates on these forthcoming changes will be provided as they are defined in preparation for future IPEDS Collections.

Next, onto a few NCES proposed changes:
NCES requests changes to multiple survey components and other updates to the identification, cross-cutting terminology, and glossary.

On of the largest changes is the proposed **Cost Component.** It will join elements from both the Student Financial Aid and Institutional Characteristics surveys. It enhances these with additional questions aimed at uncovering and subsequently disseminating comprehensive details about the methods institutions use to gather financial information that extends beyond the requirements of the FAFSA.

NCES Proposal

❖**Academic Libraries Component (AL)**

The Academic Libraries survey component will be discontinued starting with the 2025–26 academic year.

The last of the most notable proposals is the planned elimination of the **Academic Libraries** survey beginning in the 25–26 collection year.

NCES Proposal

Publication Date: 03/04/2024
Agency: Department of Education
Comments Close: 05/03/2024
Document Type: Notice
Document Citation: 89 FR 15558
Page: 15558-15559 (2 pages)
Agency/Docket Number: Docket No.: ED-2024-SCC-0040
Document Number: 2024-04509

To learn more about these proposals, or to provide your comments, here is the URL and document info. Comments close on May 3rd.

OMB's Directive No. 15 & IPEDS

Adding Middle Eastern or North African as a new minimum category. The new set of minimum race and/or ethnicity categories are:
- ❖ American Indian or Alaska Native
- ❖ Asian
- ❖ Black or African American
- ❖ Hispanic or Latino
- ❖ Middle Eastern or North African
- ❖ Native Hawaiian or Pacific Islander
- ❖ White

(Impacts: Fall Enrollment, Completions, 12-Month Enrollment, Human Resources)

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On March 28th, the Office of Management and Budget (OMB), under the Executive Branch, announced significant updates to the guidelines for collecting race and ethnicity data. These updates include the addition of a Middle Eastern or North African category among other key recommendations aimed at improving how this data is collected and reported. Following this announcement, federal agencies are now tasked with promptly revising their data collection instruments, such as surveys and forms, to align with these new standards.

IPEDS Administrators delivered a "This Week in IPEDS" alerting institutions on April 4th. However, the IPEDS Help Desk stated on April 9th that they don't know when institutions will be required to implement this for IPEDS. More to come.

Housekeeping

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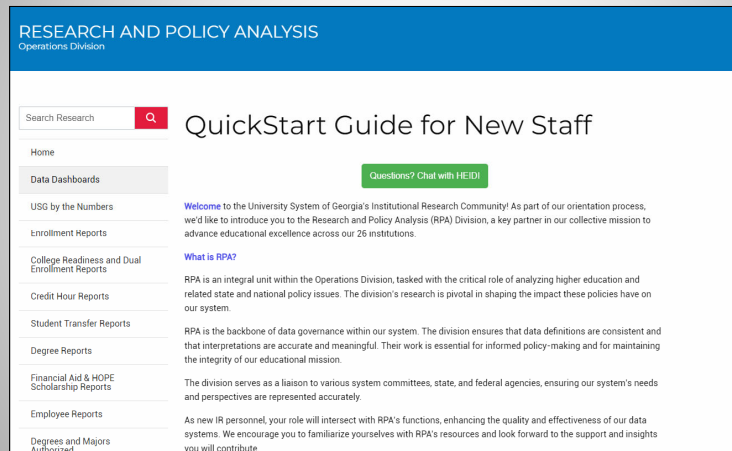❖ Net Price Calculator
❖ Report Requests

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- Any **manual changes to your IPEDS surveys** that we support should always be reported to us. Document your changes for your records and email me this information along with your justification.
- Be on the lookout, IPEDS Help Desk will start notifying institutions of any **Post Submission Review Edits** or **Data Quality Checks** for your Spring Collection surveys soon. As a reminder, they like to contact your Bursar's Office in June. Please let me know when you receive these from the IPEDS Help Desk. We can assist you with your investigation and response – or at minimum make us aware because there could be a global issue that impacts more than your institution.
- Just last week, the **Net Price Calculator Help Desk** informed me that a new template is expected sometime soon. When that occurs, we will deliver your institution's Table 2 or Grants & Scholarships data to your MOVEit folder approximately one to two months later. So, please plan to update your institution's online Net Price Calculator as soon as I notify you.
- **Report requests**—Please always email those. Requests are placed in a queue on a first-come, first-served basis.

QuickStart Guide for New IR Staff

https://www.usg.edu/research/onboarding

I recently developed a page on the RPA website designed to facilitate the onboarding process for new campus IR staff. The goal is to thoroughly acquaint your new team members with RPA and the available support system, enhancing their effectiveness in their new roles.

There is an available GPT I created and named HEIDI – Higher Education Intelligent Data Interface.

HRDM

https://www.shutterstock.com/image-vector/human-resources-word-cloud-260nw-1165788328.jpg

HRDM 2023 Recap

All institutions completed eCertification and locked data.

Even with corrections, this is the earliest since I've been part of the collection!

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A big thank you to all institutions for their work!

This is a continually improving process!

Updates

- Extractions now back to daily (reduced benefits updates)
- Verification process aligned with other collections
- Final Digest reports available online

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HRDM – Improvements from last year

Questions that did NOT arise as much this year
=
PROGRESS!

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Some questions that were more frequent last year seem to have been socialized enough that they did not come up as much this year:

Questions from HR 2022 collection

- Q: I fixed the issues in OneUSG, why are you still asking me to fix errors?
- Q. Why is this person listed as instructional (25-1xxx)? How can I change their SOC?
- Q. Why is this person listed as instructional (25-1xxx)? How can I change their SOC?
- Q. What do you mean, the activity percentages aren't in the Cognos reports?

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These were some questions that we noticed with some frequency last year that were greatly reduced this year, so time to fix other issues!

HRDM - Clarifications

Some great questions/issues came up through the collection!

Some great questions came up throughout the collection, and a few areas where we noted some additional clarity was needed. We made notes of these for future updates to documents, and will review here as well

Q. Can we have IPEDS records sooner?

- Complete IPEDS detail files and reports cannot be shown earlier than November 1
- Partial information was available this year ~October 15 for employees on bi-weekly pay
- HOWEVER, the general HR detail files ARE available earlier for review

IPEDS Definition	**Digest Definition**
Employee is active, on leave, on a short work break, or suspended (employee_status_code is A, L, P, S, W) as of November 1, 2023 AND the employee received a non-zero paycheck anytime in the month prior to November 1, 2023.	Employee is active, on leave, on a short work break, or suspended (employee_status_code is A, L, P, S, W) as of November 1, 2023 AND the employee received a non-zero paycheck anytime in the last 9 months prior to November 1, 2023.

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Issue: Re-hires

- Issues with correctly counting re-hires
  - due to dates available in the HRDM
  - testing a workaround so that institutions do not need to make manual changes without having to make major changes to extraction or HRDM

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Issue: Salary

- Questions/concerns arose about salary calculations and alignment with IPEDS definition
  - Will review again before next collection

HRDM 2023 Salary Change

COMP_RATECD	EFFDT	EFF_STATUS	DESCR	DESCRSHORT
MCACPF	1/1/1901	A	Acad Consortium Prog Faculty	AcConPgFac
MCAFA	9/1/2021	A	Academic Faculty Admin Assign	AcadFacAdm
MCCDI	1/1/1901	A	Course Delivery Incentive	CrsDelInct
MCCHR	1/1/1901	A	Special Chair	Spec Chair
MCFYO	12/1/2022	A	First Year Odyssey/Grad First	First Year
MCOVL	1/1/1901	A	Overload	Overload
MCTAF	1/1/1901	A	Temporary Assignment Faculty	TmpAsgnFac
MCTAS	1/1/1901	A	Temporary Assignment Staff	TmpAsgnStf

Additional supplementary pay codes will be included in the calculation of base salary (formerly only MCAFA as of 2020)

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Issue: Rank/Tenure Change Date

- Incorrect rank change date/tenure change dates
  - When a new tenure status or rank is entered, the tenure/rank status DATE must be changed.
  - Cognos reports pull the most recent status by date. If dates are not correct, it will not pull the correct status
- Relevant job aid (referenced in HR DED)
- Will also lay this out more explicitly when updating resources, currently stated in requires review resource, but needs to exist elsewhere

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Issue: Rank/Tenure Change Date

– When a new tenure status or rank is entered, the tenure/rank status DATE must be changed.

Example of what showed in IPEDS data:

TENURE_STATUS_DATE	TENURE_STATUS_CODE	ACADEMIC_RANK_DATE	ACADEMIC_RANK
▶ 8/1/2016	NA	8/1/2017	003

Example of PeopleSoft data showing incorrect

Most recent effective date is 4/1/2023

Most recent tenure status date is 8/1/2016

For U235216

EFFDT	EG_TENURE_HOME	EG_TRACK_HIRE_DT	TENURE_STATUS	EG_RNK_CHG_DT	EG_ACADEMIC_RANK
8/1/2017	10011	8/1/2016	NA	17	003
4/1/2023	101134	9/4/2010	NTK	8/1/2017	003

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Before today, they DID enter a new tenure status of NTK for these guys in PS. HOWEVER, they did not change the tenure status date on the new NTK record, so it was the **same** tenure status date of the previous NA record. When the cognos report pulls the tenure status data for an employee, it pulls the record with the highest tenure status date that is <= Nov. 1, 2022. If both tenure records have the same tenure status date, it does not know which one to pick (in this case it picked the NA record).

Issue: Rank/Tenure Change Date

– Cognos reports pull the most recent status by date. If dates are not correct, it will not pull the correct status

Example of IPEDS data:

	TENURE_STATUS_DATE	TENURE_STATUS_CODE	ACADEMIC_RANK_DATE	ACADEMIC_RANK
▶	8/1/2017	NA	8/1/2018	003

Example of PeopleSoft data:

For 0021253, since our logic pulls top-of-stack (most recent), if there are two rows with the same date there is no way for the logic to choose correctl selects one at random.

| EFFDT	EG_TENURE_HOME	EG_TRACK_HIRE_DT	TENURE_STATUS	EG_RNK_CHG_DT	EG_ACADEMIC_RANK
8/1/2017	1001134	8/1/2017	NA	8/1/2017	003
8/1/2018	1001134	8/1/2017	NTT	8/1/2018	003
7/1/2020	1001134	8/1/2017	NTK	8/1/2018	003

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If both tenure records have the same tenure status date, it does not know which one to pick (in this case it picked the NA record).

HRDM 2024 **Looking Ahead**

❖ Guidance documents: updates
  ❖ Working with Shared Services to develop queries to find records with incorrect rank dates or tenure dates
  ❖ Create a review checklist: we had requests for changes after surveys were locked because data were not fully reviewed
❖ Explicit instructions to wait to lock survey
  ❖ Institutions locked their surveys, then needed changes multiple times
  ❖ This requires the IPEDS helpdesk to re-open the survey to make the needed changes and delays process

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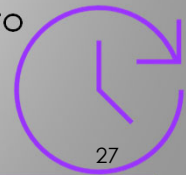
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(Leslie's cat Titus)

(Patrick's dog Ranger)

Questions?

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