



STATE
UNIVERSITY
SYSTEM
of FLORIDA
Board of Governors

2014 Higher Education Summit/SUS Data Workshop

Thursday, June 5, 2014

Session: IRM Data Workshop

Facilitator: Gene Kovacs

As of August 5, 2014

Table of Contents

Welcome: Gene Kovacs	4
Reports from Breakout Sessions from Session Facilitators:	4
IPEDS - 2014-2015 Due Dates	5
IPEDS - 2014-2015 & 2015-2016 Summary of Changes	6
General – SUDS Due Dates	18
General – Space File Redesign	20
General – UF Online and Innovation Academy	21
General – Complete Florida	22
General – Race Ethnicity	23
General – Student Program Category & Degree Program Category	24
General – Student Type	25
General – Object Code and Appropriation Category Error Report	26
Hours To Degree – Type of Student at Date of Entry & Student’s Date of Entry	28
Hours To Degree – Type of Student at Time of Most Recent Adm & Date of Most Recent Adm	29
Hours To Degree – Cumulative Excess Credit Hours	30
Modify the coding instructions for the Cumulative Excess Credit Hours or delete this element.	30
Hours To Degree – Months To Degree Dynamic SQL Report	31
Instruction & Research – University Fund Identifier	34
Instruction & Research File – Invalid Instruction and Research Activities Report	35
Operating Budget – Object Code	36
Retention – Completion Term of Undergraduate Courses	37
Student Instruction – Fee Waiver Kind	38
Student Instruction – Cumulative Hours Accepted (Transfer)	39
Student Instruction – Catalog Hours to Degree	40
Student Instruction – Course Budget Entity	41
Student Instruction – Current Term Course Load	42
Teacher Education Information – Milestone	43
Teacher Education Information – Milestone	44
Teacher Education Information – Duplicate Milestone	45
Teacher Education Information - Milestone	46
Teacher Education Information – Milestone	47
Teacher Education Information – Milestone	48
Teacher Education Information – Milestone	49
Teacher Education Information – DOE Level	50
Teacher Education Information – EPI Subject Area	51
Teacher Education Information – Submitted and Accepted with Duplicate Milestones	52

Welcome: Gene Kovacs

Chancellor's Address: Marshall Criser III

Legislative Update: Janet Owen

Reports from Breakout Sessions from Session Facilitators:

- SUS Data Administrators

- Physical Facilities and Space

- All Things Institutional Research

- Admissions and Registrars

- Council on Equal Opportunity and Diversity

- Budget Directors/Budget Information Workshop

- Teacher Education Information

IPEDS - 2014-2015 Due Dates

Description:

Topic ID: 10-10

Initiator: IPEDS

Affects: N/A

<https://surveys.nces.ed.gov/ipeds/>

2014-15	Registration	Fall 6 weeks	Winter 9 weeks	Spring 17 weeks
Collection Opens	August 6	September 3	December 10	December 10
Collection Closes for Keyholders		October 15	February 11	April 8
Collection Closes for Coordinators		October 29	February 25	April 22
Components included	Registration; Report Mapping; Institution ID; IC-Header	Institutional Characteristics; Completions; 12- month Enrollment	Student Financial Aid; Graduation Rates; 200% Graduation Rates; Admissions	Fall Enrollment; Finance; Human Resources; Academic Libraries

IPEDS - 2014-2015 & 2015-2016 Summary of Changes

Description:

Topic ID: 10-15

Initiator: IPEDS

Affects: Multiple

<https://surveys.nces.ed.gov/ipeds/>

2014-15 Detailed Changes to Forms by IPEDS Survey Component

Institutional Characteristics (IC) – Fall Collection

The first two changes below will provide important information about veterans and academic libraries; these were proposed by the IPEDS TRP. The TRP suggested that an item concerning services available to veterans be placed on IC. The TRP also suggested that the Academic Libraries Survey be re-integrated into IPEDS and a screening question to determine institutional level of reporting for a new Academic Libraries component be placed on IC.

The estimated enrollment items on IC were added in 2006-07 to fill a perceived need for an early estimate of fall enrollment, due to the fact that the IPEDS Fall Enrollment component is not collected until the following Spring. However, NCES has determined that these data are not of particularly good quality. Their inclusion in the IPEDS Data Center is a source of confusion to many (if not most) data users, and there is evidence that they are not being widely used. Further, these data are not displayed on College Navigator because they are estimates.

The last proposed change listed relates to moving the collection of admissions data to a small, separate component in the Winter. This change was proposed by the IPEDS TRP; moving the due date will enable all institutions to report data for the most recent Fall period. This, in turn, will make the IPEDS admissions data in the Data Center less confusing for data users, since only one reporting period will be represented in each data file. It will also mean that admissions data will be able to be used in the Trend Generator, which many data users have requested.

As a result of TRP suggestions and public comments, NCES requested and received clearance on the following two new items on the Institutional Characteristics component, the deletion of estimated enrollment items, and the creation of a new Admissions component in the Winter data collection, comprised entirely of items moved from the Institutional Characteristics component.

Changes to the Institutional Characteristics (IC) Form (all versions)			
Change	Implementation Year	Source	Estimated burden
<p>Add the following item to collect data on veterans:</p> <ul style="list-style-type: none"> Which of the following are available to veterans, military service members, or their families? <ul style="list-style-type: none"> Post-9/11 GI Bill Yellow Ribbon Program Credit for military training Dedicated point of contact for support services for veterans, military service members, and their families Recognized student veteran organization Member of Servicemembers Opportunity Colleges URL for tuition policies specifically related to veterans and military service members 	<p>2014-15 (2013-14 preview year)</p>	<p>Veterans TRP</p>	<p>Minimal</p>
<p>Add screening question for degree-granting institutions to determine level of reporting on new Academic Libraries component:</p> <ul style="list-style-type: none"> What are your annual total library expenditures? <ul style="list-style-type: none"> If annual total library expenditures = 0 there is no additional reporting. If annual total library expenditures >0, the institution will submit the new Academic Libraries component, as described in the Academic Libraries section below. 	<p>2014-15 (2013-14 preview year)</p>	<p>Academic Libraries TRP</p>	<p>Minimal</p>
<p>Delete Estimated Enrollment Items</p> <ul style="list-style-type: none"> Early estimates of full-time and part-time undergraduate students, first-time undergraduate students, and graduate students, as of October 15 or the institution's official fall reporting date. 	<p>2014-15</p>	<p>NCES, public comments</p>	<p>Slight decrease</p>
<p>Delete the following items that collect admissions information from IC, and create a separate small component in the Winter collection. Items will be collected only from institutions that do not have an open admission policy. Moving the collection of these items to the Winter collection will enable all institutions to report data for the most recent fall period.</p> <ul style="list-style-type: none"> Admissions requirements: Select the option (required, recommended, neither required nor recommended, don't know) that best describes how your institution uses any of the following data in its undergraduate selection process: <ul style="list-style-type: none"> Secondary school GPA Secondary school rank Secondary school record Completion of college-preparatory program Recommendations Formal demonstration of competencies 	<p>2014-15</p>	<p>Calendar TRP</p>	<p>No change in burden. Change in when data are collected.</p>

- (e.g., portfolios, certificates of mastery, assessment instruments)
- Admission test scores
 - SAT/ACT
 - Other test (ABT, Wonderlic, WISC-III, etc.)
 - TOEFL
- Provide the number of first-time, degree/certificate-seeking students who applied, who were admitted, and who enrolled (either full- or part-time) at your institution for the most recent fall period. For each category, report men, women, and total as available.
 - Number of applicants
 - Number of admissions
 - Number (of admitted) that enrolled full-time
 - Number (of admitted) that enrolled part-time
- If test scores are required for admission for first-time, degree/certificate-seeking undergraduate students, provide the number and percentage of enrolled students submitting SAT and/or ACT scores, and the 25th and 75th percentile scores for each test listed:
 - SAT Critical Reading, Math, Writing
 - ACT composite, English, Math, Writing

Student Financial Aid (SFA) – Winter Collection

TRP 36, Collecting Data on Veterans, focused on discussing possible ways to utilize existing data and collect new information on veterans and military service members to better address policy and research questions, as well as to provide more detailed information on the number and types of students using education benefits and how these students are being served by institutions. Many of the panel members either directly represented veterans organizations or represented institutions enrolling a large number of veterans and military service members.

Additionally, Executive Order 13607 requires the Secretary of Education, in consultation with the Secretaries of Defense and Veterans Affairs, as part of IPEDS and other data collection systems, to collect information on the amount of funding received pursuant to the Post-9/11 Bill and the Tuition Assistance Program, for posting on the College Navigator website.

As a result of TRP suggestions, public comments, and Executive Order 13607, NCES requested and received clearance on the following items on the Student Financial Aid component.

Changes to the Student Financial Aid (SFA) Form (all forms)			
Change	Implementation Year	Source	Estimated burden
Add the following items:	2014-15	Veterans TRP	Moderate
<ul style="list-style-type: none"> Number of undergraduate and graduate students receiving Post-9/11 GI Bill benefits and the total dollar amount of tuition and fee benefits awarded to them through the institution Number of undergraduate and graduate students receiving DoD Tuition Assistance and the total dollar amount of DoD Tuition Assistance awarded to them through the institution 	(2013-14 preview year)		

Admissions (ADM) – Winter Collection

As detailed in the Institutional Characteristics section above, NCES proposes moving the collection of admissions data to a small, separate component in the Winter. This change was proposed by the IPEDS TRP so that all institutions will be able to report data for the most recent Fall period. This, in turn, will make the IPEDS admissions data in the Data Center less confusing for data users, since only one reporting period will be represented in each data file. It will also mean that admissions data will be able to be used in the Trend Generator, which many data users have requested. Finally, it will ensure that admissions data displayed on College Navigator will represent the same Fall period.

NCES requested and received clearance to establish a separate Admissions component in the Winter collection.

New Separate Admissions (ADM) Component			
Change	Implementation Year	Source	Estimated burden
Create separate small component in the Winter collection from items formerly in IC component. Items will be collected only from institutions that do not have an open admission policy. Moving the collection of these items to the Winter collection will enable all institutions to report data for the most recent fall period.	2014-15 (no preview year, as items are collected on IC through 2013-14)	Calendar TRP	No change in burden. Change in when data are collected.
<ul style="list-style-type: none"> Admissions requirements: Select the option (required, recommended, neither required) 			

nor recommended, don't know) that best describes how your institution uses any of the following data in its undergraduate selection process:

- Secondary school GPA
- Secondary school rank
- Secondary school record
- Completion of college-preparatory program
- Recommendations
- Formal demonstration of competencies (e.g., portfolios, certificates of mastery, assessment instruments)
- Admission test scores
 - SAT/ACT
 - Other test (ABT, Wonderlic, WISC-III, etc.)
 - TOEFL
- Provide the number of first-time, degree/certificate-seeking students who applied, who were admitted, and who enrolled (either full- or part-time) at your institution for the most recent fall period. For each category, report men, women, and total as available.
 - Number of applicants
 - Number of admissions
 - Number (of admitted) that enrolled full-time
 - Number (of admitted) that enrolled part-time
- If test scores are required for admission for first-time, degree/certificate-seeking undergraduate students, provide the number and percentage of enrolled students submitting SAT and/or ACT scores, and the 25th and 75th percentile scores for each test listed:
 - SAT Critical Reading, Math, Writing
 - ACT composite, English, Math, Writing

Finance (F) – Spring Collection

TRP 39, Improving Finance Survey Forms for For-Profit Institutions, centered around how to increase data comparability across institutional sectors and utility to institutions and decision makers, while also ensuring data being reported are appropriate for the sector and accurately represent the institutions. Members of the for-profit sector were well represented on the panel.

The for-profit sector has experienced dramatic growth in both the number of institutions and enrollments since 2000. At the same time, demand for transparency around college costs and spending at all types of

postsecondary institutions has increased. Policymakers and other stakeholders have expressed interest in topics like the distribution of instructional expenses by expense type and the percentage of total revenue from federal grants. However, the FASB forms for for-profit institutions collect considerably less detail than the FASB forms for nonprofit institutions and GASB forms, so there are limitations to accurately comparing these data statewide or aggregating them at the national level.

The panel examined the current finance survey forms item by item to consider which items are reported by GASB and nonprofit FASB institutions that could also be reported by the for-profit institutions to increase comparability across the forms. This review of the finance forms also focused on possible additions to the FASB forms for for-profit institutions that could help provide a more complete picture of financial conditions within higher education and address changing policy and research needs.

As a result of TRP suggestions and public comments, NCES requested and received clearance on the following items on the Finance component.

Changes to the For-Profit Finance (F) Form				
Change	Implementation Year	Source	Estimated burden	
Make changes to Revenues information collected	2014-15	Finance TRP	Significant increase	
<ul style="list-style-type: none"> • Separate federal appropriations, grants, and contracts into two categories: <ul style="list-style-type: none"> ○ Federal appropriations ○ Federal grants and contracts • Separate state and local government appropriations, grants, and contracts into four categories: <ul style="list-style-type: none"> ○ State appropriations ○ State grants and contracts ○ Local appropriations ○ Local grants and contracts • Add private gifts to be reported with private grants and contracts • Add the following two revenues categories: <ul style="list-style-type: none"> • Hospital services • Independent operations revenue 	(2013-14 preview year)			

2014 Higher Education Summit/SUS Data Workshop – IRM

June 5, 2014, 8:00 - 3:00

<p>Make changes to Expenses information collected:</p> <ul style="list-style-type: none"> • Separate research and public service into two categories: <ul style="list-style-type: none"> ○ Research ○ Public service • Separate academic support, student services, and institutional support into three categories: <ul style="list-style-type: none"> ○ Academic support ○ Student services ○ Institutional support • Add the following new functional expense categories: <ul style="list-style-type: none"> ○ Operation and maintenance of plant ○ Hospital services ○ Independent operations • The following categories will be allocated across the functional categories and will also be reported as a total amount following the expense matrix used by public and private nonprofit institutions: <ul style="list-style-type: none"> ○ Salaries and wages ○ Employee fringe benefits ○ Operations and maintenance ○ Interest ○ Depreciation ○ All other • Add a new screening question: <ul style="list-style-type: none"> ○ What is your business structure? <ul style="list-style-type: none"> • Based on the information provided, institutions with the business structure of either C Corporations or LLC will subsequently be asked to report income tax expenses as follows: <ul style="list-style-type: none"> • Total Federal income tax expenditures • Total state and local income tax expenditures 	<p align="center">2014-15 (2013-14 preview year)</p>	<p align="center">Finance TRP</p>	<p align="center">Significant increase</p>
<p>Make changes to Scholarships and Fellowships information collected:</p> <ul style="list-style-type: none"> • Separate state and local grants (government) into two categories: <ul style="list-style-type: none"> • Grants by state government • Grants by local government 	<p align="center">2014-15 (2013-14 preview year)</p>	<p align="center">Finance TRP</p>	<p align="center">Significant increase</p>
<p>Make changes to Balance Sheet information collected:</p> <ul style="list-style-type: none"> • Add the following new categories: <ul style="list-style-type: none"> • Long-term investments • Property, plant, and equipment, net of accumulated depreciation • Intangible assets, net of accumulated amortization • Debt related to property, plant, and 	<p align="center">2014-15 (2013-14 preview year)</p>	<p align="center">Finance TRP</p>	<p align="center">Significant increase</p>

- equipment
- Additional detail to align with financial statements
- Land improvements
- Buildings
- Equipment—including art and library collections
- Construction in progress
- Other plant, property, and equipment
- Total plant, property, and equipment
- Accumulated depreciation

Academic Libraries (AL) – Spring Collection

TRP 35, Reintegrating the Academic Libraries Survey (ALS) into IPEDS, considered the feasibility of reintegrating ALS into IPEDS, examined current ALS data elements, and discussed ways of improving data quality by clarifying definitions and better aligning key elements of the library component with data reported in other IPEDS components. Representation on the panel included individuals from academic libraries.

The current Academic Libraries Survey is collected from degree-granting postsecondary institutions every other year in even-numbered years; the current burden estimate is 8.1 hours. When implemented in IPEDS, the Academic Libraries component will be comprised of fewer items, collected annually; the TRP estimated that the burden would be 4 hours.

As a result of TRP suggestions and public comments, NCES requested and received clearance to implement a new Academic Libraries component in the Spring data collection, to replace the existing ALS.

New Academic Libraries Component			
Change	Implementation Year	Source	Estimated burden
Add items for degree-granting institutions if expenditures > 0: <ul style="list-style-type: none"> • Is the library collection entirely electronic? (Y/N) • Collect library collections counts, physical and digital/electronic, as applicable: 	2014-15 (2013-14 preview year)	Academic Libraries TRP	Moderate

<ul style="list-style-type: none"> ○ Books ○ Databases ○ Media ● Circulation, physical and digital/electronic, as applicable 			
Add items for degree-granting institutions if expenditures are > \$100,000:	2014-15 (2013-14 preview year)	Academic Libraries TRP	Moderate
<ul style="list-style-type: none"> ● Number of branch and independent libraries—exclude main or central library ● Total salaries and wages ● Are staff fringe benefits paid out of the library budget? (Y/N) ● Fringe benefit expenditures if paid by the library budget ● One-time purchases of books, serial backfiles and other materials ● Ongoing commitments to subscriptions ● Other information resources ● Preservation services ● All other operations and maintenance expenditures ● Total interlibrary loans and documents provided to other libraries ● Total interlibrary loans and documents received ● Does your library support virtual reference services? 			

All Survey Components

In order to provide better estimates of burden on an ongoing basis, NCES will ask IPEDS keyholders to report voluntarily the time required to complete each survey component as follows: in the 2012-13 data collection, the 2014-15 data collection, and every third year thereafter. NCES estimates a burden of 0.2 hours to track, record and report this time for the following components: Institutional Characteristics and Admissions,

Completions, 12-month Enrollment, Graduation Rates, 200% Graduation Rates, Outcome Measures, and Fall Enrollment. NCES estimates it will take 0.4 hours for Student Financial Aid, Finance, Human Resources, and Academic Libraries, because these four components typically involve additional offices at the institution and require keyholders to get time estimates from others at the institution.

2015-16 Detailed Changes to Forms by IPEDS Survey Component

Outcome Measures (OM) – Winter Collection 2015-16

The *Higher Education Opportunity Act* of 2008 established the U.S. Department of Education's Committee on Measures of Student Success to advise the Secretary of Education in assisting 2-year degree-granting institutions of higher education in meeting the completion or graduation rate disclosure requirements outlined in the *Higher Education Act* of 1965, as amended. The Committee completed its work in December 2011.

In its final report to the Secretary, the Committee noted that the "current federal graduation rate measure is incomplete and does not adequately convey the wide range of student outcomes at 2-year institutions." In addition, the Committee observed that "data are not collected on other important outcomes achieved by students at 2-year institutions."

The Committee recommended that the Department:

- Broaden the coverage of student graduation data to reflect the diverse student populations at 2-year institutions
- Improve the collection of student progression and completion data
- Improve technical guidance to institutions in meeting statutory disclosure requirements
- Encourage institutions to disclose comparable data on employment outcomes and provide incentives for sharing promising practices on measuring student learning

Although its work focused on 2-year institutions, the Committee suggested that its recommendations be considered and implemented for 4-year institutions as well. The Committee's final report is available at <http://www2.ed.gov/about/bdscomm/list/cmss-committee-report-final.pdf>.

In April 2012, the Department released an action plan for improving measures of postsecondary student success in support of the Administration's college completion agenda and based on the recommendations of the Committee on Measures of Student Success (<http://www.ed.gov/edblogs/ous/files/2012/03/Action-Plan->

[for-Improving-Measures-of-Postsecondary-Student-Success-FINAL2.pdf](#)).

The Department's action plan is designed to improve the quality and availability of student success data at the federal level for consumers, institutions, policymakers, and researchers. This plan also includes activities to help institutions, systems, and states increase their capacity for collecting and disseminating data on student success. Various offices within the Department are responsible for implementing the activities within the plan. In the plan, the Department has committed to "revise, where feasible under its current authority, existing data collection vehicles to include more comprehensive measures of student success for a broader group of students."

As part of this activity, the NCES has taken steps to enhance graduation rate and transfer rate reporting in IPEDS. Using existing processes for considering changes to IPEDS, NCES examined the feasibility of broadening measures by collecting outcome information for part-time, degree/certificate-seeking undergraduate students and non-first-time, degree/certificate-seeking undergraduate students in IPEDS.

IPEDS TRP 37 was convened in February 2012 to discuss the feasibility of collecting outcome information on first-time, part-time students. The TRP suggested that the definition of a degree/certificate-seeking student for IPEDS reporting purposes be clarified, and that certain outcome information be collected in IPEDS for first-time, part-time students.

IPEDS TRP 40 was convened in October 2012 to discuss the feasibility of collecting outcome information on non-first-time students. The TRP suggested that certain outcome information be collected in IPEDS for non-first-time students, similar to information that TRP 37 proposed for first-time, part-time students. The TRP also suggested that similar outcome information be collected for first-time, full-time students. Institutions would report outcome information for four cohorts in mutually exclusive categories, as outlined below.

The new outcome information that institutions would report to IPEDS is designed to provide consumers, policymakers, and researchers context for and an alternative to the graduation rates calculated for the purposes of the *Student Right to Know and Campus Security Act* of 1990.

To expedite the availability of data that will be useful to consumers, policymakers, and researchers, TRP 40 suggested that institutions report on student outcomes retrospectively. **If a prospective reporting model were used, outcome measures data would not be available until 2023.**

As a result of TRP suggestions and public comments, NCES requested and received clearance to implement a new Outcome Measures component in the Winter collection.

New Outcome Measures (OM) Component			
Change	Implementation Year	Source	Estimated burden
<p>Collect outcome measures data from degree-granting institutions on 4 degree/certificate-seeking student cohorts as shown below. Academic reporting institutions will report on Fall cohorts; program and hybrid reporters will report on Full-year cohorts.</p> <ul style="list-style-type: none"> • Full-time, first-time students • Part-time, first-time students • Full-time, non-first-time entering students • Part-time, non-first-time entering students <p>Note : Data will not be disaggregated by race, ethnicity, or gender.</p> <p>Note : No outcome data will be collected from non-degree-granting institutions.</p> <p>For each of the 4 cohorts, collect a status update using the following categories:</p> <ul style="list-style-type: none"> • Received award • Did not receive award, still enrolled at reporting institution • Did not receive award, subsequently enrolled at another institution • Did not receive award, subsequent enrollment status unknown <p>A total of students who did not receive an award will be calculated.</p> <p>Collect the status update from both 2-year and 4-year institutions at 8 years after the cohort enters the institution, with award information collected for both the 6-year and 8-year timeframes. Outcome Measures data collection will begin in 2015-16. Institutions will report on their 2007 cohorts.</p>	<p>2015-16</p> <p>(2014-15 preview year)</p>	<p>Outcome Measures TRPs</p>	<p>Substantial</p>

•

2014 Higher Education Summit/SUS Data Workshop – IRM

June 5, 2014, 8:00 - 3:00

General – SUDS Due Dates

Description: Due Dates for 2014-2015 Standard Files

Topic ID: 50-10

Initiator: Board-IRM

Affects: N/A

	*Not Submitted by NCF	**NCF only	Changes	Term Option	
ABBREV	TITLE	TERM	REPT TIME FRAME	DUE DATE	STATUS
SPA	Physical Facilities Space File	Annual 2014	201400	Jul-14-14 Mon	REQUIRED
LAP *	Limited Access Programs File	Annual 2013	20132014	Jul-25-14 Fri	REQUIRED
TEI *	Teacher Education Information	Fall 2013	201308	Jul-17-14 Thu	OPTIONAL
OB	Operating Budget File	Annual 2014	20142015	Aug-18-14 Mon	REQUIRED
SCD	Salary Category Detail File	OB 2014	201408	Aug-18-14 Mon	REQUIRED
ADM *	Admissions File	Summer 2014	201405	Sep-05-14 Fri	REQUIRED
SIF *	Student Instruction File	Summer 2014	201405	Sep-12-14 Fri	REQUIRED
ADM	Admissions File	Fall 2014	201408	Sep-26-14 Fri	REQUIRED
CPC *	College Prep Completions	Summer 2014	201405	Oct-03-14 Fri	REQUIRED
SFA	Student Financial Aid File	Annual 2013	20132014	Oct-06-14 Mon	REQUIRED
IRD	Instruction & Research File	Annual 2013	20132014	Oct-07-14 Tue	REQUIRED
SIFD *	Degrees Awarded	Summer 2014	201405	Oct-07-14 Tue	REQUIRED
SIFP	Student Instruction File Preliminary	Fall 2014	201408	Oct-10-14 Fri	REQUIRED
HTD *	Hours to Degree File	Annual 2013	20132014	Oct-14-14 Tue	REQUIRED
LAP *	Limited Access Programs File	Summer 2014	201405	Oct-14-14 Tue	OPTIONAL
EA	Expenditure Analysis File	Annual 2013	20132014	Oct-21-14 Tue	REQUIRED
HTD *	Hours to Degree File	Summer 2014	201405	Nov-04-14 Tue	OPTIONAL
EMPL	University Employee/OPS File	Fall 2014	201410	Nov-13-14 Thu	REQUIRED
TEI *	Teacher Education Information	Spring 2014	201401	Sep-29-14 Mon	OPTIONAL
TEI *	Teacher Education Information	Annual 2013	20132014	Sep-29-14 Mon	REQUIRED
IRD *	Instruction & Research File	Summer 2014	201405	Dec-02-14 Tue	OPTIONAL
SCD	Salary Category Detail File	MidYr 2015	201501	Jan-09-15 Fri	REQUIRED
SIF *	Student Instruction File	Fall 2014	201408	Jan-16-15 Fri	REQUIRED
CPC *	College Prep Completions	Fall 2014	201408	Jan-16-15 Fri	REQUIRED
SIF **	Student Instruction File	Fall 2014	201408	Jan-23-15 Fri	REQUIRED
LAP *	Limited Access Programs File	Fall 2014	201408	Feb-03-15 Tue	OPTIONAL
SIFD *	Degrees Awarded	Fall 2014	201408	Feb-06-15 Fri	REQUIRED
ADM *	Admissions File	Spring 2015	201501	Feb-27-15 Fri	REQUIRED
ADM **	Admissions File	Spring 2015	201501	Feb-20-15 Fri	REQUIRED
SIFP *	Student Instruction File Preliminary	Spring 2015	201501	Mar-06-15 Fri	REQUIRED
HTD *	Hours to Degree File	Fall 2014	201408	Mar-06-15 Fri	OPTIONAL
SIFP **	Student Instruction File Preliminary	Spring 2015	201501	Mar-06-15 Fri	REQUIRED

2014 Higher Education Summit/SUS Data Workshop – IRM

June 5, 2014, 8:00 - 3:00

IRD	Instruction & Research File	Fall 2014	201408	Mar-18-15 Wed	OPTIONAL
TEI*	Teacher Education Information	Summer 2014	201405	Apr-03-15 Fri	OPTIONAL
RET	Retention File	Annual 2013	20132014	Jan-21-15 Wed	REQUIRED
EMPL	University Employee/OPS File	Spring 2015	201503	Apr-13-15 Mon	REQUIRED
SIF *	Student Instruction File	Spring 2015	201501	Jun-11-15 Thu	REQUIRED
CPC *	College Prep Completions	Spring 2015	201501	Jun-11-15 Thu	REQUIRED
SIF **	Student Instruction File	Spring 2015	201501	Jun-17-15 Wed	REQUIRED
LAP *	Limited Access Programs File	Spring 2015	201501	Jun-19-15 Fri	OPTIONAL
SIFD *	Degrees Awarded	Spring 2015	201501	Jun-24-15 Wed	REQUIRED
SCD	Salary Category Detail File	EOY 2015	201506	Jun-24-15 Wed	REQUIRED
SIFD **	Degrees Awarded	Spring 2015	201501	Jul-06-15 Mon	REQUIRED
HTD *	Hours to Degree File	Spring 2015	201501	Jul-21-15 Tue	OPTIONAL
IRD	Instruction & Research File	Spring 2015	201501	Jul-31-15 Fri	OPTIONAL

General - Space File Redesign

Description: New File Submission

Topic ID: 50-20

Initiator: Board-IRM

Affects:

General – UF Online and Innovation Academy

Description: New Element

Topic ID: 50-30

Initiator: Board-IRM

Affects:

We are proposing to add a new element to report UF's online and Innovation Academy students so that we may be able to report on these students in every way that we currently report the traditional program students. This element will also be used for the addition of any future non-traditional programs. The name of this new element is yet to be determined and is up for discussion.

Final Disposition: A new element will be added to identify the UF online and Innovation Academy students. The name of this element is yet to be determined.

General – Complete Florida

Description: New Element

Topic ID: 50-40

Initiator: Board-IRM

Affects:

We are proposing to add a new element to report the Complete Florida students so that we may be able to report on these students in every way that we currently report the traditional program students.

Final Disposition: A new element will not be added to identify Complete Florida students. This information will be requested from the Complete Florida office to match to our database.

General – Race Ethnicity

Description: Modify Software

Topic ID: 50-50

Initiator: Board-IRM

Affects: SIF/ADM

We are proposing to modify our software by setting Race Ethnicity (01044) to a null value (.) during submission file upload. The field is not required and therefore should not be populated by the universities.

Final Disposition:

Edit will be modified to null (.) the Racial Ethnicity Group (01044) during the submission file upload. This affects all submission with the option to submit the PERSON_DEMO table.

General - Student Program Category & Degree Program Category

Description: Modify Edit

Topic ID: 50-60

Initiator: Board-IRM

Affects: LAP, SIFP, SIF, SIFD, HTD, TEI

We are proposing to modify existing edit 5208 to validate the Student Program Category (01062) and the Degree Program Category (01082) down to the branch campus level for USF on the APPLICANTS_ADMITS, ENROLLMENTS, DEGREES_AWARDED, HOURS_TO_DEGREE, and the TCHR_ED_MILESTONE tables.

Final Disposition: Diagnostic 5208 will be modified to validate the Student Program Category (01062) and the Degree Program Category (01082) down to the branch campus level for USF.

General - Student Type

Description: Modify Software

Topic ID: 50-70

Initiator: Board-IRM

Affects: LAP, HTD, SIFP, SIF, SIFD, ADM

We are proposing to add a new value for Post Baccalaureate Degree seeking to the Type of Student (01414), Type of Student at Date of Entry (01068), and Type of Student at Time of Most Recent Admission elements on the ENROLLMENTS and APPLICANTS_ADMITS tables. This value is being added to distinguish between Post Baccalaureate Degree and Non-degree seeking students. The actual value has yet to be determined.

Final Disposition:

A new value 'S' will be added for Post Baccalaureate Degree seeking to the Type of Student (01414), Type of Student at Date of Entry (01068), and Type of Student at Time of Most Recent Admission

General – Object Code and Appropriation Category Error Report

Description: New Error Report

Topic ID: 50-80

Initiator: Board-IRM

Affects: OB, IRD

We are proposing to add a new error report on the Operating Budget (OB) and Instruction & Research (IRD) submissions to display object codes and appropriation categories that are invalid on the OB Expenditure Analysis Extract and the IRD Expenditure Analysis Extract files. This report is to identify these errors prior to uploading the extract data on the Expenditure Analysis (EA) submission so that it can help prevent the resubmission of both the OB and IRD submissions.

Final Disposition:

A new dynamic SQL report will be added on the Operating Budget (OB) and Instruction & Research (IRD) submissions to display object codes and appropriation categories that are invalid on the OB Expenditure Analysis Extract and the IRD Expenditure Analysis Extract files.

Hours To Degree – Hours Used To Degree

Description: Modify Edit

Topic ID: 100-20

Initiator: Board-IRM

Affects: HTD

Modify edit 0140 on Hours Used to Degree (01478) to produce an error if the hours used to degree is less than 99% of catalog hours instead of 95%.

Final Disposition:

Edit 0140 on Hours Used to Degree (01478) will be modified to produce an error if the hours used to degree is less than 100% of the catalog hours instead of 95%. The Board office will work with UWF to find a way to report their departmental waivers.

Hours To Degree – Type of Student at Date of Entry & Student’s Date of Entry

Description: Add Element

Topic ID: 100-30

Initiator: Board-IRM

Affects: HTD

We are proposing to add the Type of Student at Date of Entry (01068) and Date of Entry (1064) to the HOURS_TO_DEGREE table.

Final Disposition:

The Type of Student at Date of Entry (01068) and Date of Entry (01064) will be added to the HOURS_TO_DEGREE table

Hours To Degree – Type of Student at Time of Most Recent Adm & Date of Most Recent Adm

Description: Add Element

Topic ID: 100-40

Initiator: Board-IRM

Affects: HTD

We are proposing to add the Type of Student at Time of Most Recent Admission (01413) and Date of Most Recent Admission (01420) to the HOURS_TO_DEGREE table.

Final Disposition:

The Type of Student at Time of Most Recent Admission (01413) and Date of Most Recent Admission (01420) will be added to the HOURS_TO_DREE table

Hours To Degree – Cumulative Excess Credit Hours

Description: Modify Coding Instructions

Topic ID: 100-50

Initiator: Board-IRM

Affects: HTD

Modify the coding instructions for the Cumulative Excess Credit Hours or delete this element.

Final Disposition:

The Cumulative Excess Credit Hours will no longer be reported on the HOURS_TO_DEGREE table. We will null this element at load time.

Hours To Degree – Months To Degree Dynamic SQL Report

Description: Modify Report

Topic ID: 100-60

Initiator: Board-IRM

Affects: HTD

We are proposing to rename the 'AVG_MONTHS' columns to 'MONTHS' and add more columns to the Months to Degree Dynamic SQL Report. The additional columns will provide the universities more information to match back to their data. The columns that will be added are:

Student Date of Entry (01064)

Term Degree Granted (01412)

Final Disposition:

The above modifications to the Months To Degree Dynamic SQL report will be made.

TWO NEW ELEMENTS WILL BE ADDED TO HTD:

Active Duty Military

Personal Hardship Withdrawal

Instruction & Research – Course Section Location - Campus

Description: Modify Element

Topic ID: 150-10

Initiator: Board-IRM

Affects: IRD

We are proposing to modify Course Section Location – Campus (01099) element to be “Required” on the Workload_Activities table on the IRD Submission. This is to ensure that it is reported by all institutions.

Final Disposition:

The above modification will be made.

Instruction & Research File – Course Program Category

Description: New Error Report

Topic ID: 150-20

Initiator: Board-IRM

Affects: IRD Submission

We are proposing to add a new error report on the IRD submission that will list the cost activities submitted with an invalid COURSE_PROGRAM_CATEGORY(01098).

Final Disposition:

The new error report will be added

Instruction & Research – University Fund Identifier

Description: Add New Element

Topic ID: 150-30

Initiator: Board-IRM

Affects: IRD Extract, IRD Submission and OB Extract

We are proposing to add the University Fund Identifier (01400) element to the Instruction & Research Extract and Submission and the OB Extract. This element is being added in order to calculate expenditures without carry forward funds. Details will be discussed in the general session.

Final Disposition:

Needs further discussion with the budget office. The above element will not be added.

Instruction & Research File – Invalid Instruction and Research Activities Report

Description: New Error Report

Topic ID: 150-30

Initiator: Board-IRM

Affects: IRD Submission

We are proposing to add a new error report on the Instruction & Research (IRD) submission to display Instruction and Research Activities (01509) that are not assignable on the IRD Expenditure Analysis Extract file. The purpose of this report is to identify these errors prior to uploading the extract data on the Expenditure Analysis (EA) submission so that it can help prevent the resubmission of IRD file submission.

Final Disposition:

The new report will be added to the IRD submission

Operating Budget – Object Code

Description: Add New Codes

Topic ID: 200-10

Initiator: Board-IRM

Affects: OB

The new object codes listed below for OPS health insurance reporting will be added to the OBJECT_CD (01302) element on the OPERATING_BUDGET table.

157005 – “OPS Pretax Administrative Assessment”

161005 – “OPS State Health – Employer’s Contribution”

Final Disposition:

The above object codes will be added

Retention - Completion Term of Undergraduate Courses

Description: Modify Software

Topic ID: 250-10

Initiator: Board-IRM

Affects: RET

We are proposing to add a new element to the Retention software to identify when a student seeking a PharmD or accelerated masters degree (in which they will never be awarded a bachelors degree) has completed their undergraduate studies. This information is needed to correctly report these students to IPEDS as completers of a less than 4 year degree.

Final Disposition:

A new element, Undergraduate Completion Term for PharmD and Accelerated Masters programs, will be added to the Enrollments table on the SIF submission.

NEW REPORT:

A new Grad Rates report will be created for AA transfers. This report will be like the existing FTIC report.

Student Instruction – Fee Waiver Kind

Description: New Values
Topic ID: 300-10
Initiator: Board-IRM
Affects: SIF

A new value for Fee Waiver Kind (01108) on the Fee Waivers table to include students enrolled in a Florida private secondary school as defined in Florida Statutes 1007.271. The actual value is yet to be determined.

A new value will be added for undocumented students per HB 851.

A new value will be added for out-of-state student veterans per HB 7015.

A new value will be added for child welfare services per SB 1666.

The Road to Independence program has been expanded per SB 1666 (s. 1009.25 (1)(d)), therefore language will be added to this data value reflecting the new changes.

Final Disposition:

A new value (**US - Type I Out of State**) will be added for undocumented students per HB 851.

A new value (**SV - Type I Out of State**) will be added for out-of-state student veterans per HB 7015.

A new value (**CW - Type III State Fundable**) will be added for child welfare services per SB 1666.

A new value (**Q2 - Type III State Fundable**) will be added for students enrolled in a Florida private secondary school as defined in Florida Statutes 1007.271

Student Instruction – Cumulative Hours Accepted (Transfer)

Description: New Element

Topic ID: 300-20

Initiator: Board-IRM

Affects: SIF, SIFP

We are proposing to split the Cumulative Hours Accepted (Transfer) (01061) into two data elements, hours earned before high school graduation (dual enrollment hours) and post secondary hours earned after high school graduation.

With this new modification, we would like to add a new edit to check the transfer hours against the FTIC classification (Student Type = B,E). If a student is reported as an FTIC, their transfer hours should be 12 or less. We have discovered a lot of records that have a lot more than 12 hours and the student has been reported as an FTIC.

Final Disposition:

A new element Cumulative Hours Accepted Prior to High School Graduation (Transfer) will be added to the ENROLLMENTS table. A new edit (5 level warning) will also be added to check the transfer hours against the FTIC classification (Student Type = B,E). If a student is reported as an FTIC, their post secondary transfer hours earned after high school graduation should be 12 or less.

Student Instruction – Catalog Hours to Degree

Description: Add New Element

Topic ID: 300-30

Initiator: Board-IRM

Affects: SIF, SIFP

We are proposing to add the Catalog Hours to Degree (01477) element to the ENROLLMENTS table on the Student Instruction File submission.

Final Disposition:

We will not be adding the Catalog Hours to Degree element to the ENROLLMENTS table.

Student Instruction – Course Budget Entity

Description: New Edit
Topic ID: 300-40
Initiator: Board-IRM
Affects: SIF, SIFP

We are proposing to add a new edit to check for no auxiliary-funded courses.

Final Disposition:

This new edit will not be added.

Student Instruction – Current Term Course Load

Description: New Edit
Topic ID: 300-50
Initiator: Board-IRM
Affects: SIF

We are proposing to add a cross-edit between Enrollments and Courses Taken to ensure the Current Term Course Load (01063) on Enrollments agrees with the Courses Taken table. A level 9 error will be generated.

Final Disposition:

Check the existing edit to ensure that it is working correctly. If not, it will be modified as stated above.

Teacher Education Information – Milestone

Description: New Edit (Level 9)

Topic ID: 350-10

Initiator: Board-IRM

Affects: TEI

When MILESTONE equals 'I' (Internship) and the TCHR_PREP_DOE_LEVEL equals 'B', 'M', 'S', 'D' there must be an existing enrollment record matching the MILESTONE_TERM reported from the 'SIF' or 'SIFD' submission.

Final Disposition:

A new edit will be added as stated above for degree seeking students

Teacher Education Information – Milestone

Description: Modify Edit 5370

Topic ID: 350-20

Initiator: Board-IRM

Affects: TEI

For milestone terms in Summer 2013, if the milestone is a completion of non-clinical courses, Internship, program completion, withdrawal, or transfer and they are not seeking an endorsement, an admission milestone must exit.

Currently:

If Milestone = ('C' or 'I' or 'P' or 'W' or 'T') and DOE Level is not an Endorsement and could not find admission milestone.

Change to:

When Milestone_term >= 201305, Milestone in ('C', 'I', 'P', 'W', or 'T'), DOE level is not an Endorsement, and could not find an Admission milestone record (milestone = 'A')

Final Disposition:

Edit diag 5370 will be modified as stated above

Teacher Education Information – Duplicate Milestone

Description: Modify Edit 5369

Topic ID: 350-30

Initiator: Board-IRM

Affects: TEI

The duplicate milestone already exists edit will be **changed** from a level 9 error to a load error.

Final Disposition:

Edit diag 5369 that checks for a duplicate milestone will be changed from a level 9 error to a fatal load error.

Teacher Education Information - Milestone

Description: Modify Edit 5350

Topic ID: 350-40

Initiator: Board-IRM

Affects: TEI

When submitting a program completion record (Milestone = 'P') for Baccalaureate, Masters, Specialist, and Doctorate degree seekers, a record must exist on the DEGREES_AWARDED table for the corresponding degree CIP and level.

Currently:

When TCHR_PREP_DOE_LEVEL IN('B','M') and MILESTONE = 'P' there must be a SIFD record matching the CIP_DEGREE and the TCHR_PREP_DOE_LEVEL.

Change to:

When TCHR_PREP_DOE_LEVEL IN ('B','M','S','D') and MILESTONE = 'P' there must be a SIFD record matching the CIP_DEGREE and the TCHR_PREP_DOE_LEVEL.

Final Disposition:

Edit diag 5350 will be modified as stated above

Teacher Education Information – Milestone

Description: Modify Edit 0777

Topic ID: 350-50

Initiator: Board-IRM

Affects: TEI

The Degree Program Category (01082) must be reported for all program completion milestones when the State-Approved Teacher Prep Pgm - DOE Level (01423) is a baccalaureate, masters, specialist, or doctorate.

Currently:

CIP DEGREE cannot be missing if the MILESTONE is a completion and the TCHR_PREP_DOE_LEVEL is 'B' or 'M'.

Change to:

CIP DEGREE cannot be missing if the MILESTONE is a completion and the TCHR_PREP_DOE_LEVEL in ('B','M','S','D').

Final Disposition:

Edit diag 0777 will be modified as stated above

Teacher Education Information – Milestone

Description: Modify Edit 5352

Topic ID: 350-60

Initiator: Board-IRM

Affects: TEI

For all State-Approved Teacher Prep Pgm - DOE Codes (01425) except 285 and 700, when a student is transferring from one program to another, there must exist an admissions, internship, completion of non-clinical course requirements, or a transfer record for a program that leads to a bachelors, masters, specialist, or doctorate degree.

Currently:

If the MILESTONE equals T there must be an existing record in the TCHR_ED_MILESTONE table (A, I, C, or T) for a program that leads to a university degree (B, M, S, D)

Change to:

If the TCHR_PREP_DOE_CD not in (285, 700) and MILESTONE equals T there must be an existing record in the TCHR_ED_MILESTONE table (A, I, C, or T) for a program that leads to a University degree (B, M, S, D)

Final Disposition:

Edit diag 5352 will be modified as stated above

Teacher Education Information – Milestone

Description: Modify Edit 5353

Topic ID: 350-70

Initiator: Board-IRM

Affects: TEI

For all program completers of baccalaureate, masters, specialist, and doctorate degrees, an enrollments record must exit for the milestone term on the Student Instruction (SIF) or Degrees Awarded (SIFD) submission

Currently:

When MILESTONE equals (C or I) and the TCHR_PREP_DOE_LEVEL equals (B, M, S, D) there must be an existing enrollment record matching the MILESTONE_TTERM reported from the SIF or SIFD submission.

Needs to be changed to:

When MILESTONE equals C and the TCHR_PREP_DOE_LEVEL equals (B, M, S, D) there must be an existing enrollment record matching the MILESTONE_TTERM reported from the SIF or SIFD submission.

Final Disposition:

Edit diag 5353 will be modified as stated above

Teacher Education Information – DOE Level

Description: Modify Edit 0823

Topic ID: 350-80

Initiator: Board-IRM

Affects: TEI

Currently:

The previous DOE Level (01423) should be the same value or a modified value in current DOE level

Change to:

The modified current DOE Level cannot equal the previous unmodified DOE Level

Final Disposition:

Edit diag 0823 will be modified as stated above

Teacher Education Information – EPI Subject Area

Description: New Element

Topic ID: 350-90

Initiator: Board-IRM

Affects: TEI

A new element, “EPI Subject Area,” will be added to the Teacher Educational Information file (TEI) (FS 1004.85 EPI subject area references). The new element is to add the program code (subject area) when a student completes an EPI (Educational Preparation Institutes) program. An example of the EPI-Subject-Area is the code “114”, which represents that the student subject area for their EPI requirement for an Art program. The student must meet all requirements, which could include coursework and field experience that is appropriate for their EPI-Subject-Area. A missing or invalid edit will be added with this new element.

Final Disposition:

A new element, EPI Subject Area, will be added to the TCHR_ED_MILESTONE table as stated above.

Teacher Education Information – Submitted and Accepted with Duplicate Milestones

Description: New Report

Topic ID: 350-100

Initiator: Board-IRM

Affects: TEI

A new automatically generated delimited text file , 'Submitted and Accepted with Duplicate Milestones', will be added to the Teacher Education Information submission to display the duplicate milestones.

Final Disposition:

A new report, Submitted and Accepted with Duplicate Milestones, will be added to the TEI software as stated above.