



STATE
UNIVERSITY
SYSTEM
of FLORIDA
Board of Governors

**2018 Higher Education Summit
SUS Data Workshop**

Thursday, June 7, 2018

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Important Note:* There is an unresolved question regarding the effective date for the new 4-year exemption for Excess Hrs that is pending feedback from legislative staff. Regardless of the decision from legislative staff, we have decided to go ahead and implement these changes into the HTD software for the 2017-18 release. If it turns out that this new exemption does not apply to the 2017-18 HTD data, then we will not use the 2017-18 data as part of the calculation for Accountability purposes – however, we think it will still be useful for universities to see how the new derived elements will work before they are official.

Welcome: Jason Jones

Legislative Update:

Kristin Whitaker,
Assistant Vice Chancellor, Public Policy and Advocacy
Board of Governors

Reports from Breakout Sessions from Session Facilitators:

- Admissions and Registrars
- Facilities
- Budget
- Data Administrators
- Board Portal Overview

#2.

Topic: IPEDS - 2018-2019 Due Dates

BOG Staff: Terricka Washington

IPEDS Link: <http://nces.ed.gov/ipeds/Home/ReportYourData>

IPEDS 2018-19 Data Collection Schedule			
Keyholder UserIDs start with P or 88G			
	Opens	Keyholder Close	Coordinator Close
Registration Registration* Report Mapping Institution Identification IC-Header	August 8, 2018	August 29, 2018 (register by date)	
Fall Collection Institutional Characteristics (IC) Completions (C) 12-Month Enrollment (E12)	September 5, 2018	October 17, 2018	October 31, 2018
Winter Collection Student Financial Aid (SFA) Graduation Rates (GR) 200% Graduation Rates (GR200) Admissions (ADM) Outcome Measures (OM)	December 12, 2018	February 13, 2019	February 27, 2019
Spring Collection Fall Enrollment (EF) Finance (F) Human Resources (HR) Academic Libraries (AL)		April 10, 2019	April 24, 2019
* Registration contact information can be updated starting 8/8/2018 through 7/14/2019 ** Institution Identification information can be updated starting 8/8/2018 through 6/1/2019			

2018 Higher Education Summit/SUS Data Workshop

June 7, 2018, 8:00 - 3:00

#3.

Topic: Finalize Due Dates for 2018-2019 SUDS Submissions

BOG Staff: Terricka Washington

CHGS	ABRV	TITLE	TERM	REPT TIME FRAME	BETA RELEASE 5 WORKDAYS	PROD RELEASE 20 WORKDAYS*	UNIVERSITY DUE DATES
N	OB	Operating Budget File	Annual 2018	20182019	Jul-10-18 Tue	Jul-17-18 Tue	Aug-21-18 Tue
Y	SCD	Salary Category Detail File	OB 2018	201808	Jul-10-18 Tue	Jul-17-18 Tue	Aug-21-18 Tue
Y	ADM	Admissions File	Summer 2018	201805	Jul-25-18 Wed	Aug-01-18 Wed	Sep-07-18 Fri
.	SPA	Physical Facilities Space File (2wk < SIF)	Summer 2018	201805	.	.	Sep-07-18 Fri
Y	SIF	Student Instruction File	Summer 2018	201805	Aug-08-18 Wed	Aug-15-18 Wed	Sep-21-18 Fri
N	TEI	Teacher Education Information	Annual 2017	20172018	Aug-13-18 Mon	Aug-20-18 Mon	Sep-25-18 Tue
Y	SIFD	Degrees Awarded	Summer 2018	201805	Aug-15-18 Wed	Aug-22-18 Wed	Sep-28-18 Fri
Y	SFA	Student Financial Aid File	Annual 2017	20172018	Aug-20-18 Mon	Aug-27-18 Mon	Oct-02-18 Tue
Y	ADM	Admissions File	Fall 2018	201808	.	.	Oct-05-18 Fri
Y	SIFP	Student Instruction File Preliminary	Fall 2018	201808	.	.	Oct-12-18 Fri
Y	IRD	Instruction & Research File	Annual 2017	20172018	Sep-11-18 Tue	Sep-18-18 Tue	Oct-23-18 Tue
N	EA	Expenditure Analysis File	Annual 2017	20172018	Sep-18-18 Tue	Sep-25-18 Tue	Oct-30-18 Tue
Y	HTD	Hours to Degree File	Annual 2017	20172018	Sep-26-18 Wed	Oct-03-18 Wed	Nov-07-18 Wed
Y	EMPL	University Employee/OPS File	Fall 2018	201810	Oct-05-18 Fri	Oct-12-18 Fri	Nov-19-18 Mon
Y	SCD	Salary Category Detail File	MidYr 2019	201901	.	.	Jan-08-19 Tue
.	SPA	Physical Facilities Space File (2wk < SIF)	Fall 2018	201808	.	.	Jan-08-19 Tue
Y	SIF	Student Instruction File	Fall 2018	201808	.	.	Jan-22-19 Tue
Y	RET	Retention File	Annual 2017	20172018	Dec-14-18 Fri	Dec-21-18 Fri	Jan-30-19 Wed
N	SIFD	Degrees Awarded	Fall 2018	201808	.	.	Feb-01-19 Fri
Y	ADM	Admissions File	Spring 2019	201901	.	.	Mar-01-19 Fri
Y	EMPL	University Employee/OPS File	Spring 2019	201903	.	.	Apr-09-19 Tue
.	SPA	Physical Facilities Space File (2wk < SIF)	Spring 2019	201901	.	.	May-29-19 Wed
Y	SIF	Student Instruction File	Spring 2019	201901	.	.	Jun-12-19 Wed
Y	SCD	Salary Category Detail File	EOY 2019	201906	.	.	Jun-21-19 Fri
N	SIFD	Degrees Awarded	Spring 2019	201901	.	.	Jun-26-19 Wed

Note*: Workdays exclude weekends and thursdays (due to scheduled maintenance). The average days between PROD release and due dates is 36 days.

#4

Topic: Admissions - Update Test Values

Action: Add New Values

BOG Staff: Elizabeth Jasin

Submissions Impacted: ADM

Tables Impacted: Test Requirements/TEST_REQS (TSTR)

Proposed Effective Date: Summer 2018

Description:

This action is a response to the 8/2017 revision to BOG Regulation 6.008. We are proposing to add two new test values (for ACCUPLACER and PERT) to the following elements:

- Test or Requirement Type Code Element (#2008)

Allowed Values:

Element	New Allowed Values for Test Types:
2008	AC for ACCUPLACER and PE for PERT

#5

Topic: Admissions – Revise Edits for Test Scores

Action: Modify Edits

BOG Staff: Elizabeth Jasin, Erin Wright, Michelle Turner

Submissions Impacted: ADM

Tables Impacted: Applicants Admits (ADMA), Test Required/TEST_REQS (TSTR)

Proposed Effective Date: Summer 2018

Description:

We are proposing to terminate edit 5802, modify edit 0685, and replace edits 5357 and 5358. These changes response to the 8/2017 revision to BOG Regulation 6.008 that allows the highest test scores on any of the tests or combination of tests identified in subsection (1) of regulation 6.008. As a result of the change in Regulation, the Board office is now requesting that the highest score from all subscores be reported on the ADM submission – not just those used for the admission’s decision.

Diagnostic Edits:

Code	Action
5802	10% Tolerance exceeded for Diagnostic Code 0685 will no longer exists for 201805 and forward
0685	Replace Level 9 error with Level 5 error (the level 9 error will no longer exist as of 201805)
5381	New Edit 5381 will replace the 5357 to include ACCUPLACER and PERT allowed Values.
5388	New Edit 5388 will replace the 5358 to include ACCUPLACER and PERT allowed Values.

Code	Diagnostic Message	Lvl
0685	GPA_High_School must be provided when Stu_Typ = J or U and Fee_Class_Res = F, T or N and Deg_Highest_Held not = A, C or B and Stu_Class_Level = L and Final_Adm_Action = A and HS_ETS_CD is not 888888 or XXXXXX	5
5381	If Final Admission Action (01135) = Admitted (A) and Type of Student(01414) is equal to Beginner - FTIC (B) or Early Admit (E) and Fee Classification - Residency (01106) is equal to Florida Resident (F), Non-Florida Resident (N), or Florida Resident Special Category (T) and the Student's Classification Level (01060) is Lower Undergraduate (L) and High School GPA (01139) is less than 2.5 or test scores on entrance exams are less than those needed for college placement, then Exception Status (01200) must equal FTIC Profile - Assessment (F). In cases where multiple scores are submitted for a group (Reading, Writing/English, or Math) the score that is above the threshold trumps all other scores.	9
5388	If Final Admission Action (01135) equals Admitted (A) and Student Type (01414) equals Transfer from Florida College System (J) or Other Undergraduate Transfer (U) and the Fee Classification Residency (01106) is equal to Florida Resident (F), Non-Florida Resident (N), or Florida Resident - Special Category (T), and Student Classification Level (01060) = Lower Division Undergraduate (L) and High School GPA (01139) is less than 2.5 or College GPA (01270) is less than 2 or test scores on entrance exams are less than those needed for college placement, then the Exception Status (01200) must be one of the following: Transfer Student - Undergraduate Exception (T), Entering or Transferring Graduate Students and Post-Baccalaureate Profession Students Exception (G) or Substitutions and/or Modifications (M). In cases where multiple scores are submitted for a group (Reading, Writing/English, or Math) the score that is above the threshold trumps all other scores.	9

#5

Topic: Admissions - Revise Edits for Test Scores *continued*

Code	Pseudocode
0685	The high school GPA is required for all USA high school graduates (not including GED or home schoolers) who are admitted as a lower level undergraduate transfer student without an AA/AS or BA/BS degree and have less than 30 transferrable semester hours. Note: This rule does not apply to transfer students who are admitted with 30 or more transferrable credit hours.
5381	If a student is admitted as an undergraduate beginner or early admit from USA high school with a GPA of 2.5 or higher and test scores that meet the requirements for college placement they are considered a standard admission student. Students not meeting this criteria should have a Profile Assessment Flag indicating they are an exception to the admissions policy. In cases where multiple scores are submitted for a group (Reading, Writing/English, or Math) the score that is above the threshold trumps all other scores.
5388	If a student is admitted as a lower undergraduate transfer student from a USA high school with a GPA of 2.5 or higher, test scores that meet the requirements for college placement, and a college GPA of 2.0 or higher, they are considered a standard admission student. Students not meeting this criteria should have a Profile Exception Status indicating they are an exception to the admissions policy. In cases where multiple scores are submitted for a group (Reading, Writing/English, or Math) the score that is above the threshold trumps all other scores.

Note: The table below provides the current test thresholds for standard admission for FTICs in which FTICs must satisfy one threshold from each group (A, B, and C) per Board Regulation 6.008.

FTIC TEST THRESHOLDS BY GROUP *(effective 201805 until changed)*

TEST	A	B	C
	READING	WRITING / ENGLISH	MATH
PERT	106	103	114
ACCUPLACER	83	83	72
ACT	19	17	19
SAT (prior 2016)	440	.	440
SAT2 (after 2016)	24	25	24

#6

Topic: Admissions - Remove College Prep Table

Action: Remove Table

BOG Staff: Jason Jones

Submissions Impacted: ADM

Tables Impacted: College Prep (PREP)

Proposed Effective Date: Summer 2018

Description:

On Jan. 4, 2018, the Chief Data Officer sent an email to the SUDS listserv announcing the decision to terminate the College Prep Completions (CPC) submission for the SUDS collection cycle. As a result, this College Prep table is also being removed from the Admissions submission.

#7

Topic: Benacquisto Scholars OOS Waiver

Action: Add New Value to Element

BOG Staff: Benita McMillian & Michelle Turner

Submissions Impacted: SIF/SIFP

Tables Impacted: FEE_WAIVERS (FEEW)

Proposed Effective Date: Summer 2018

Description:

We are adding a new value ('5016') to the Waiver/Exemption Type (#01109) in response to the 2018 Florida Legislature's change to the Benacquisto Scholarship Program (see Florida Statute 1009.893) that provides Benacquisto Scholars with a mandatory exemption from the payment of out-of-state fees.

New Value:

Value	Description	Grouping
5016	Benacquisto Scholars OOS Waiver F.S. 1009.893 Benacquisto Scholars are exempt from the out-of-state fees.	Mandatory

New Diagnostic Edit:

Sub Code	Table Name	Diag Code	Diagnostic Message	Error Level
SIF/ SIFP	Fee_Waiver	0848	If the Waiver/Exemption Type (01109) equals ('5016'), then Fee Class Residency (01106) must be coded as Non-Resident Alien (A), Resident Alien, Non-Florida Resident (E), Non-Florida Resident (N).	9

#8
Topic: Dual Enrollment Indicator (#10074)
Action: Replace Existing Dual Enrollment Identification Element (#01070) with New Element
BOG Staff: Benita McMillian & Michelle Turner
Submissions Impacted: SIF/SIFP/SIFD/HTD
Tables Impacted: ENROLLMENTS (ENRL)
Proposed Effective Date: Summer 2018

Description:

A code used to indicate a non-degree seeking student who is undertaking course work at a secondary and post-secondary educational institution during the same term. Qualified students in sixth (6th) through twelfth (12th) grade are eligible to undertake dual enrollment courses. This excludes Early Admits (Stu_typ= 'E') because they are seeking a bachelor's degree.

Allowed Values:

Value	Description
N	Not Dually Enrolled
S	Home Schooling Program
P	Public School
V	Private School
.	Missing

Diagnostic Edits:

Sub Code	Table Name	Diag Code	Diagnostic Message	Error Level	Error Description
SIF/SIFP	Enrollments New Frequency Edit	4312	Frequency of Values for ENROLLMENTS.DUAL_ENROLL_INDICATOR	0	Frequency Distribution: not an indication of an error
SIF/SIFP	Enrollments New Edit Replacing 0327	0825	Dual Enrollment Indicator (10074) must be coded as Private School (V), Public School (P), or Home Schooling Program (S) if the Type of Student at Time of Most Recent Admission (01413) equals Dually Enrolled - High school (H) and the Degree-Highest Level Held (01112) equals No Degree (N).	9	Critical Error: may cause submission to be rejected

Note: The proposed edit that would have required a waiver/exemption (#1109) for this new element is not being implemented due to the variety of payment scenarios for dual enrolled students.

#9

Topic: Select Self-Supporting Course (#10075)

Action: Create a New Element

BOG Staff: Benita McMillian & Michelle Turner

Submissions Impacted: SIF/SIFP

Tables Impacted: COURSES_TAKEN (COUR)

Proposed Effective Date: Summer 2018

Description:

Indicates if the course is a market tuition rate course, a for-credit continuing education course, or a sponsored credit course.

Supportive Information:

This element is designed to capture a select group of courses as defined by BOG Regulation 8.002 and is not intended to capture ALL self-supporting course activities – for example, ‘study abroad’ courses are not included. Credit hours generated by these select self-supporting courses cannot be funded through the E&G Budget Entity. The Student Section Funding Flag (#1103) for these select self-supporting courses must be classified as either ‘Funded From Non-University Sources’ (‘4’) or ‘Non-Fundable, Student Funded’ (‘L’).

Allowed Values:

Value	Description
M	Market Tuition Rate indicates graduate-level courses that are included as part of a graduate-level degree program that has been specifically approved by the Board of Governors as a ‘market tuition rate’ program and is entirely funded from the auxiliary budget entity.
C	Continuing Education indicates for-credit college courses that are entirely funded through the auxiliary budget entity. This does not included not-for-credit continuing education activities.
S	Sponsored Credit Course indicates courses that are paid by an external sponsoring entity, and are entirely funded through auxiliary or contracts & grants budget entities. There is no expenditure of Education & General (E&G) funds for the conduct of these courses, and no fees or other assessments are collected from students by the sponsoring entity, the university, or any other entity.
N	Not Applicable
.	Missing values

#9

Topic: Select Self-Supporting Course (#10075) *continued*

Diagnostic Edits:

Diag Code	Diagnostic Message	Error Level
0008	Missing or Invalid Value	9
0849	If Select Self-Supporting Course (10075) equals Continuing Education (C), Sponsored Credit (S), or Market Tuition Rate (M), then Course Budget Entity Code (01100) cannot be coded as E&G (1)	9
0850	If Select Self-Supporting Course (10075) equals Sponsored Credit (S), then Course Budget Entity Code (01100) must be coded as Auxiliary (2) or C&G (3)	9
0851	If Select Self-Supporting Course (10075) equals Market Tuition Rate (M) or Continuing Education (C), then Course Budget Entity Code (01100) must be coded as Auxiliary (2).	9
0859	If Select Self-Supporting Course (10075) equals Market Tuition Rate (M), then Common Course Number (01196) must begin with a 5 or higher.	9
0860	If Select Self-Supporting Course (10075) equals Market Tuition Rate (M), Continuing Education (C), or Sponsored Credit (S), then Student Section Funding Flag (01103) must be coded as a Funded From Non-University Sources ('4') or Non-Fundable, Student Funded ('L').	9

#10

Topic: HTD - FIRST_ENRL_TERM (#10076)

Action: Create New Element

BOG Staff: Erin Wright

Submissions Impacted: HTD

Tables Impacted: HOURS_TO_DEGREE (HTD)

Proposed Effective Date: 2017-18 HTD

Description:

We are proposing a new BOG derived element that identifies a degree-seeking student’s first term of enrollment at their native institution as reported on the Courses to Degree table of the HTD submission. This derived element is based on the minimum enrolled term that is greater than or equal to the student’s recent admit date.

Supportive Information:

This field is used to calculate the flag (GRAD_IN_4YR_EXEMPT #10077) identifying students exempt from the excess hour surcharge for completing a baccalaureate within 4 years after initial enrollment as a first-time in college (FTIC) student at their native institution. The minimum TERM_TAKEN (#01051) for each student on the COURSES_TO_DEGREE table is limited to enrollment at the native institution (CRS_SYSTEM #01484 = ‘N’) and those classes that are Academic Courses (CRS_GROUP #01485 = ‘A’). Classes taken as Unclassified (STU_CLASS_LEVEL #01483 = ‘N’) are excluded. It is calculated as the minimum enrolled term that is greater than or equal to the student recent admit date (STU_RECENT_ADM_DT #01420). *Note: This four-year window differs from the 4yr grad rate because it does not include the trailing summer term.*

Allowed Values:

Value	Description
YYYY01	Spring Term
YYYY05	Summer Term
YYYY08	Fall Term

Diagnostic edits on next page.

#10

Topic: HTD - FIRST_ENRL_TERM (#10076) *continued*

Diagnostic Edits:

Code	Algorithm	Error Level
6026	<p>The minimum TERM_TAKEN (#01051) for each student on the COURSES_TO_DEGREE table is limited to enrollment at the native institution (CRS_SYSTEM #01484 = 'N') and those classes that are Academic Courses (CRS_GROUP #01485 = 'A'). Classes taken as Unclassified (STU_CLASS_LEVEL #01483 = 'N') are excluded.</p> <p>For first-time in college students (FTIC) who are readmitted (where STU_ENTRY_TYP #01068 and STU_RECENT_ADM_TYP #01413 are both 'B' or 'E'), the first enrolled term is calculated as the minimum enrolled term greater than or equal to the student entry date (STU_ENTRY_DT #01064).</p> <p>For all other students, the first enrolled term is calculated as the minimum enrolled term that is greater than or equal to the student recent admit date (STU_RECENT_ADM_DT #01420).</p>	1
Code	Diagnostic Message	Error Level
0861	<p>The derived field, first enrolled term(#10076), should not be missing for first-time in college students (FTIC), defined as those with recent admit types of Beginner - FTIC 'B' or Early Admit, Prior to High School Graduation 'E'.</p>	9

#11

Topic: HTD - GRAD_IN_4YRS_EXEMPT (#10077)

Action: Create New Element

BOG Staff: Erin Wright

Submissions Impacted: HTD

Tables Impacted: Hours to Degree (HTD)

Proposed Effective Date: 2017-18 HTD

Description:

A Board of Governors derived code that indicates if a first-time in college (FTIC) student with a single major completed a baccalaureate degree within four years of initial enrollment at their native institution. Students meeting this criteria are coded 'Y' and are exempted up to 12 credit hours from the excess hour calculation on the SUDS report Excess Hours Reported by Student Detail. FTIC that do not complete within four years are coded 'N'. Non-FTIC are coded '!'. This calculation is different from the four year grad rate in that it is strictly limited to 12 terms (it does NOT include the trailing summer).

Supportive Information:

The number of terms between the first enroll term (FIRST_ENRL_TERM #10076) and the term the degree is granted (TERM_DEG_GRANT #01412) is calculated for first-time in college students (FTIC) as identified by their student recent admit type (STU_RECENT_ADM_TYP #01413) being Beginner - FTIC (B) or Early Admit, Prior to High School Graduation (E). If the number of terms between the first enroll term and the term degree is granted is less than or equal to 12, the flag is set to Y, otherwise, the flag is N. Students flagged as Y are exempted up to 12 credit hours in the excess hour calculation.

If the student recent admit type (STU_RECENT_ADM_TYP #01413) is anything other than Beginner - FTIC (B) or Early Admit, Prior to High School Graduation (E) the field is coded as '.'

Allowed Values:

Value	Description
Y	First-time in college student graduating with a baccalaureate degree within 4 years.
N	First-time in college student that did not graduate with a baccalaureate degree within 4 years.
.	Not a first-time in college student.

Diagnostic Edits:

Code	Diagnostic Message	Level	Description
6030	A code that indicates if a first-time baccalaureate earning student with a single major completed their degree within four years of initial enrollment at the native institution.	1	Generated or Modified during SUDS Edit Process

#12

Topic: HTD - DEGREE_LEVEL_GRANT (#01426)

Action: Modify Edit

BOG Staff: Erin Wright

Submissions Impacted: HTD

Tables Impacted: HOURS_TO_DEGREE (HTD)

Proposed Effective Date: 2017-18 HTD

Description:

We are proposing to end diagnosotic edit (#5287): For Hours to Degree (HTD) the degree must have been reported on an accepted Degrees Awarded (SIFD) or on the current HTD submission on the DEGREES_AWARDED table and MUST be the first bachelor's and a single major.

A new diagnostic edit will be created that verifies that each student submitted on the HTD has been reported on an accepted Degrees Awarded (SIFD) submission, MUST be the first bachelor's, and a single major. The degree highest held on the associated SIF Enrollment table must be less than a bachelor's degree (a bachelor's degree or higher cannot have already been earned). The reference to degrees submitted with HTD is removed and the new edit will be a level X edit.

Supportive Information: This action is tied to the removal of the degrees_awarded table from the HTD. The HTD should never include students who have not already been submitted on the SIFD.

*Note: Late degrees submitted on SIFD after the HTD is submitted are not included.

Diagnostic Edits:

Code	Action
5287	Replace Level 9 error with Level X error.

Code	Diagnostic Message	Error Level
5389	The degree DEGREE_LEVEL GRANT (#01081) must have been reported on an accepted Degrees Awarded (SIFD) and MUST be the first bachelor's and a single major. The degree highest held on the SIF Enrollment table must be less than a bachelor's degree (a bachelor's degree or higher cannot have already been earned).	X Fatal Error: must be resolved, an explanation is not acceptable.

#13

Topic: HTD – Revise Report: Excess Hours Degree Report by Student Detail

Action: Revise Dynamic SQL Report

BOG Staff: Erin Wright

Submissions Impacted: HTD

Tables Impacted: n/a

Proposed Effective Date: 2017-18 HTD

Description:

We are proposing to modify the ‘Annual Excess Hours Degree Report by Student Detail’ HTD report to account for the new 4 year exemption for the calculation of PBF’s excess hours.

#	COLUMNS	NEW	NOTES
1	UNIV		
2	CAMPUS		
3	REPT_TIME_FRAME		
4	CIP_DEGREE		
5	TERM_DEGREE_GRANTED	X	
6	UNIV_ROW_ID		
7	UNIV_ID	X	
8	STU_REC_TYP		
9	FIRST_ENRL_TERM	X	
10	GRAD_IN_4YRS_EXEMPT	X	
11	DEG_HIGHEST_HELD		
12	STU_TYPE		
13	CAT_HRS		
14	CAT_TERM		
15	NAV_HRS		
16	NON_NAV_UTD		
17	DUAL_ENRL		
18	FRNLANG		
19	INTERN		
20	COLPREP		
21	EXAM_CRED		
22	LIFE_EXP		
23	GRD_ROLLOVR		
24	MILITARY		
25	ACT_DUTY_MIL		
26	PERSONAL_HARDSHIP		
27	4YR_EXEMPT_HRS	X	This field translates the ‘GRAD_IN_4YRS_EXEMPT’ Y/N flag into credit hours. The logic is: ‘IF GRAD_IN_4YRS_EXEMPT=’Y’, THEN 12; ELSE 0.’
28	MAX_APPROVD_CAT_HRS		

#14

Topic: RET - Cohort Adjustment Indicator

Action: Update Values in Element

BOG Staff: Benita McMillian & Terricka Washington

Submissions Impacted: RET

Tables Impacted: RET_COHORT_CHGS (RETC)

Proposed Effective Date: 2017-18 RET

Description:

We are clarifying the descriptions for the existing values within this element.

Allowed Values:

Values	Description
1	Student transferred to less than 2-year institution within 150% of normal time. This value is only used for IPEDS GRS reporting of transfer outs. This value does not remove students from their original cohort.
2	Student transferred to 2-year institution within 150% of normal time. This value is only used for IPEDS GRS reporting of transfer outs. This value does not remove students from their original cohort.
4	Student transferred to 4-Year or higher institution within 150% of normal time. This value is only used for IPEDS GRS reporting of transfer outs. This value does not remove students from their original cohort.
A	Adjusted by Death of Student. This value is an IPEDS exclusion and serves to remove students from all cohorts.
B	Student registered but never attended. This removes the student from their cohort.
D	Student is Totally and Permanently Disabled. This value is an IPEDS exclusion and serves to remove students from all cohorts.
F	Student left to serve in armed forces or was called up to active duty. Do not include students already in the military who transfer to another duty station. This value is an IPEDS exclusion and serves to remove students from all cohorts.
G	Student left to serve with Foreign Aid Service of the federal government, such as the Peace Corps. This value is an IPEDS exclusion and serves to remove students from all cohorts.
I	Information Adjusted by Correction: This value is an adjustment - not an exclusion. This value will <u>not</u> remove students from the cohort. These are adjustments to the cohort_type, SRK_flag, or full/part_time_indicator based on newly confirmed information.
K	Student left due to natural disaster. This is not an exclusion.
M	Student Left to serve on Official Church Mission. This value is an IPEDS exclusion and serves to remove students from all cohorts.
P	Student removed from FTIC cohort because they entered a Pharmacy doctoral (PharmD) program without earning a bachelor's degree. Student is moved to the Other degree/certificate sub cohort – Completers with 150%. He/she is placed in the completers of programs of at least 2 but less than 4 academic years (or equivalent) category. This value is technically an adjustment, not an exclusion, because it <u>moves</u> students from their original cohort to a different cohort.
T	Student removed from FTIC cohort because they entered an Advanced Graduate program without earning a bachelor's degree. Student is moved to the Other degree/certificate sub cohort – Completers with 150%. He/she is placed in the completers of programs of at least 2 but less than 4 academic years (or equivalent) category. This value is technically an adjustment, not an exclusion, because it <u>moves</u> students from their original cohort to a different cohort.
Q	Student is removed from the cohort because they were incorrectly reported in multiple cohorts or they should not have been reported in any cohort.

#14

Topic: RET - Cohort Adjustment Indicator *continued*

Diagnostic Edits:

Code	Diagnostic Message	Level
0008	Missing or Invalid	9
0826	COHORT_ADJUST_IND cannot be "I" when COHORT_TYP_NEW is blank, or SRK_FLG_NEW is blank, or FULL_PART_ADJUST_IND is blank.	9
0827	COHORT_ADJUST_IND must be 'Q' when COHORT_TYP_NEW = 'Q'	9

#15

Topic: RET - Revise Reports

Action: Revise Dynamic SQL Reports

BOG Staff: Benita McMillian & Terricka Washington

Submissions Impacted: RET

Tables Impacted: n/a

Proposed Effective Date: 2017-18 RET

Description:

We are updating the dynamic SQL reports on the RETENTION submission. The revisions to the Academic Progress Rate report is summarized in the table below. In addition, we will add a new report that provides student level detail for the 4yr FT-FTIC grad rates. The current 6yr report will remain.

~~Accountability Report FT-FTIC Retention Summary (2nd Fall)~~

Accountability Plan: FT-FTIC Retention Summary (2nd Fall)

#	COLUMN	STATUS	NOTES
1	REPT_INST		
2	UNIV_ROW_ID		
3	UNIV_ID	NEW	
4	REPT_TIME_FRAME		
5	COHORT_YEAR		
6	CAMPUS_CD_ADMIN		
7	COHORT_TYP		
8	STU_RIGHT_KNOW_FLG		
9	COHORT_ADJ_IND	NEW	
10	FULL_PART_TIME		
11	GRAD_YR1	NEW	
12	FALL_TERM_2		
13	CUM_GPA_YR1	REVISED	Based on Cumulative GPA at Beginning of Term = TOT_INST_GRD_PTS (01086) / GPA_INST_HRS (01085) – NOT SIFP.

Accountability Plan: FT-FTIC Graduation Summary (4th Year)

#	COLUMN	STATUS	NOTES
1	REPT_INST		
2	UNIV_ROW_ID		
3	REPT_TIME_FRAME		
4	COHORT_YEAR		
5	CAMPUS_CD_ADMIN		
6	COHORT_TYP		
7	STU_RIGHT_KNOW_FLG		
8	COHORT_ADJ_IND	NEW	
9	FULL_PART_TIME		
10	GRAD_YR4	NEW	

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Topic: RET - Revise Reports

Action: Add New Downloadable File

BOG Staff: Benita McMillian & Terricka Washington

Submissions Impacted: RET

Tables Impacted: n/a

Proposed Effective Date: 2017-18 RET

Description:

We are adding the IPEDS uploadable file to the list of the SUDS downloadable retention files.

Note: We will also provide Data Administrators with annotated code for the IPEDS GRS report program.

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Topic: Employee – BOG Job Structure (#02087)

Action: Create New Element

BOG Staff: Amanda Ropp and Liz Laurienzo

Submissions Impacted: EMPL, SCD, IRD

Tables Impacted: Employee Data (EDAT), Employee Vacant (EVAC), Workload Person Funding (WKPF)

Proposed Effective Date: Summer 2017 for IRD; Summer 2018 for EMPL & SCD

We are proposing to create a new element – BOG Job Structure Category that is a State University System specific, categorical classification of institutional jobs (positions) by structural category. This is a hierarchy that represents the uniqueness of the university workforce, while clustering major job types in a way that allows for comparisons across institutions. This element was developed for specific purposes and limited as identified in the following: All institutional jobs are to be coded according to the thirteen (13) values. The values (categories) were defined by Council of College and Universities HR Executives (CUHRE) and vetted by the Council of Data Administrators (CODA). Jobs types are aligned with the structure categories according to the category description. Job titles vary between institutions, therefore a job with the same title at different institutions may fall into different categories. For example, jobs maybe have differences in: scope, level of responsibility, level of independent judgment and/or allocation of time between various duties – including supervision.

This new element will be used to provide policymakers a more accurate, and comparable, view of the personnel job structure within the System. This proposed element has the dual benefits of accommodating the various and unique job classification at each institution without affecting any of the other existing links between data submissions and reports that are currently in use. In addition, creating a new element allows for interinstitutional comparisons without requiring institutions to sacrifice their unique job classifications.

Description/Definition - As it will appear in the SUDS Data Dictionary

A State University System specific categorical classification of institutional jobs by structural category. This is a hierarchy that represents the uniqueness of the university workforce, while clustering major job types in a way that allows for comparisons across institutions.

Technical Coding Instructions/Business Practices

All institutional jobs are to be coded according to the values below. The categories were defined by CUHRE and vetted with the Institutional Data Administrators and CODA. Jobs types should be aligned with the structure categories according to the category description. Job titles vary between institutions, therefore a job with the same title at different institutions may fall into different categories. For example, jobs maybe have differences in: scope, level of responsibility, level of independent judgment and/or allocation of time between various duties – including supervision. .

NOTE: This element is **position based**. If the employee has more than one position (i.e. one at .25 FTE and one at .75 FTE) then it is **possible that each position will have a different BOG Job Structure Category value**.

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Topic: EMPL-SCD-IRD – BOG Job Structure (#02087) *continued*

Supportive Information

This taxonomy is designed to align the reporting of job types into agreed upon structural categories. Whereas this classification does not identify the proportion of a job that is administrative it provides consistent categories for reporting of job types that are generally associated with administrative responsibilities. A workgroup of HR and Institutional Research professionals identified mutually-exclusive categorical structures for job types that represents the breadth of job types at SUS institutions. As such, they represent discernable differences in the function, scope and responsibilities associated with the various university job descriptions while acknowledging that jobs with the same title at different institutions may be qualitatively different.

Cautions on use of these data: Because institutions maintain their own job codes and control their own job descriptions, those descriptions are not consistent between institutions and should not be used for comparative purposes. The BOG Structure Categories provide greater consistency, yet as with all data, there is local content. All reporting from this field should be validated by the included institutions to assure accuracy and clarity of reporting.

It is expected that CUHRE and CODA will continue to evaluate and tweak throughout the first reporting year and that the edits on this element will become more specific as institutions prepare these data for submission to the BOG. It is also expected that the new element will lead to the elimination or rewriting of other data elements.

Allowed Values:

Value	Description
01	<p>Core Operational and Support Staff - Usually performs general tasks that are oriented and structured routine work that help maintain institutional infrastructure – may be physical or business process infrastructure. May assist those in their work unit with higher skill levels, provide primary and initial service levels, or be responsible for fulfilling designated routine service instructions. These employees are typically hourly and usually require direct supervision, but may serve as crew or team leaders.</p> <p>For example, this category might include but not limited to core operational and support staff positions like clerk, groundskeepers, custodians, secretaries, program assistants etc.</p>
02	<p>Core Operational Supervisor - Usually performs general, structured, and routine supervision of core support staff and may supervise specialized technical/ para professional. Exercises situational independent judgment and levels of tactical decision-making based on procedures in their specific areas of responsibility, and exercise of routine expertise. These employees are typically hourly and usually require task direction from higher level managers.</p> <p>For example, this category might include but not limited to core operational and support staff positions first-line supervisors of positions like clerk, groundskeepers, custodians, secretaries, program assistants etc.</p>

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Topic : EMPL-SCD-IRD – BOG Job Structure (#02087) *continued*

03	<p>Specialized Technical/ Para Professional - Usually performs generally structured routine, but specialized, work relating to technical, tactical and logistical tasks associated with institutional infrastructure- may be physical, safety, IT or business/financial process infrastructure. May perform frontline safety (police officers), specialized technical, trades, frontline healthcare assistance or clerical business/administrative tasks. These employees are typically hourly-high skilled, specialty task-oriented and usually require supervision with lower levels of independent judgment for institutional matters, but situationally may have greater levels of tactical decision-making based on procedures. – i.e. laws, codes, common practice or symptoms (e.g. safety officer, Police officer, trades, healthcare worker) typically supervision of core operational and support staff at the frontline may be performed by employees at this level.</p> <p>For example, this category might include but is not limited to specialized technical/ para professional positions like Safety officer, Police officer, tradesperson, healthcare worker, science and research technician etc.</p>
04	<p>Non-Faculty Supplementary Personnel - Typically temporary staff in positions that serve in a time limited support role (e.g. core operational, specialized, professional, administrative, etc.). Not associated with an assistantship while completing graduate education at the University as part of a qualified relationship with the institution. May be part time or fulltime.</p>
05	<p>Instruction/Research Supplementary Personnel - Typically supplementary non-tenured track contract teaching or research faculty positions on a temporary basis or time limited role (e.g. OPS Adjunct) associated with a course or project. May be part time.</p> <p>Typically student staff that serve in an academic or research support role (assistantship; work-study; departmental stipend only if a student) as part of a qualified relationship with the university (as part of being a student), usually while completing graduate education at the institution (e.g. teaching or research assistant in graduate school). May be part time.</p>
06	<p>Faculty (Full Time) - Typically fully credentialed, full time teaching and research faculty positions. The effort in these positions must be primarily in a teaching, scholarship, and research at the college level, and engaging primarily with students and related academic instructional activities. These positions are not primarily involved with administration. This category should not include any full time professional (Cat 09) classifications that are performing professional work or faculty administrators as defined in Cat. 07.</p> <p>For example, Librarians although normally counted as faculty for the purposes of this typology they may be counted differently. Those Librarians who are teaching as professors in a program should be in this category (06); Professional Librarians who are running libraries or library programs would be in Cat 09 as professional or Cat 07 as “faculty administrators” if administrator of an academic program (as academic support).</p>

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Topic : EMPL-SCD-IRD – BOG Job Structure (#02087) *continued*

07	<p>Faculty Administrators – Managerial - Typically tenure or fulltime faculty who perform primarily in managerial functions, serve as directors, or serve in lower executive functions within academic affairs, institutes, or research programs. This category should contain positions such as faculty Chairs, “Academic” Directors, Associate Directors and Assistant Directors etc. This category may include Deans if they do not serve in a function described in Categories 11 or 12. This category should not include faculty positions primarily in a full time teaching as described in Category 06 or any professionalized occupations or professional positions (see categories 08 and 09).</p> <p>For example, this category might include, but is not limited to, faculty positions like Chairs, Asst. and Assoc. Chairs, “Academic” Directors, Associate Directors and Assistant Directors etc.</p>
08	<p>Professionalized Occupation - Typically performs in a specialized individual contributor role in lower to mid-level professional positions. (e.g. typical titles-coordinators, specialists, officers, etc.) These positions usually participate in an enterprise workflow involving business processes, bureaucracy, administration and governance in a variety of job families. As professional functional content specialists in their particular areas, they typically coordinate and/or facilitate a specified application of an administrative or business process, protocol, procedure, and practice associated with institutional policies, governing regulations, rules, statutes, and state and federal laws or business practice. Tasks based on credentials and specified administrative/business activity with a moderate level to high of independent judgment in their functional area, if part of a team or work unit may be managed or supervised. These positions are typically low to mid-level salaried, but on occasion position may be hourly positions that meet all “FLSA” exempt criteria for exempt sans salary requirement. At times may also serve as lead worker or provisional project manager of a small work group. This category should not include any full time teaching faculty classifications that are performing supplementary administrative work (e.g. as an overload).</p> <p>For example, this category might include, but is not limited to, professionalized occupation positions like coordinators, academic advisors and counselors, specialists etc.</p>
09	<p>Professional - Typically salaried higher level professional positions that require professional credentials or specialized education obtained at a level of higher education. (e.g. practicing lawyers, general counsels, executive consultants, k-12 teachers and administrators, librarians [if not in cat. 07], doctors, certified healthcare experts, CPA's, etc.) These positions primarily act as individual contributors. Usually apex content experts that use analysis, evaluation and problem solving based on high level expertise; their tasks based on credentials and specified professional activity; they typically exercise high to moderate level of independent judgment. Decision making may be limited to their specialized expertise. If part of a team or work unit may be managed or supervised. May also at times serve as lead worker or ad hoc project manager of other professionals; or supervise a small work group of core operational and support staff specialized technical or non/semi-professional administrative. May include non- tenure track faculty who do not teach or conduct independent scholarly research full time as part of the position but hold a faculty line and support primary academics and research (e.g. librarian; post docs; curator, research specialist). This category should not include any full time teaching faculty classifications that are performing supplementary professional work (e.g. as an overload).</p> <p>For example, this category might include, but is not limited to, professional positions like practicing lawyers, general counsels, executive consultants, k-12 teachers and administrators, librarians [if not in cat. 07], doctors, certified healthcare experts, mental health professionals, CPA's, etc.</p>

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Topic : EMPL-SCD-IRD – BOG Job Structure (#02087) *continued*

10	<p>Lower level Managerial - Typically responsible for the operations of a team(s), unit(s), project(s) or program(s) that are part of a larger organizational division and usually requires supervision of operational and support staff, specialized non-professional administrative or professional; ensures that the team, unit, project or program remains within budget and putting into practice division goals and objectives (e.g. typical titles- mid level managers, assistant directors, associate directors etc.) May act as an individual contributor frequently, but typically involved in managerial activities and limited directing. In larger institutions may serve as both individual contributor with a concurrent supervisory capacity most of the time. Typically act as liaisons between the team, unit, project or program and higher level management.</p> <p>For example, this category might include, but is not limited to, lower level managerial positions like mid- level managers, assistant directors, associate directors etc.</p>
11	<p>Higher level Managerial - Typically responsible for the operations of a department, multiple team(s), unit(s), project(s) or program(s) that are part of a larger organizational division and usually requires supervision of operational and support staff, specialized non-professional administrative or professional; ensures that the team, unit, project or program remains within budget and putting into practice division goals and objectives (e.g. typical titles- director, higher level assistant/associate director, higher level manager etc.). Decision making at a higher level than lower level managers, administrative or professional categories; but not higher than executive. Typically act as liaisons between the team, unit, project or program and higher level management. Occasionally acts as an individual contributor but typically involved in managerial activities most of the time.</p> <p>For example, this category might include, but is not limited to, higher level managerial positions like director, higher level assistant/associate director, higher level manager etc.</p>
12	<p>Lower level Executive - Typically responsible for the overall operations of a department(s), multiple team(s), unit(s), project(s) or program(s) that and usually requires direct supervision over managerial, professional, or salaried administrative staff and indirect supervision of those who report to his/her direct reports. (e.g. typical titles- Higher level directors; Assistant and Associate VP, Deans [at times if not in cat. 07] etc.) May serve at times on the President's senior leadership team. Typically directs high level problem solving and decision making for multiple areas of responsibility and develops strategies, direction, goals, and objectives for division, program, office, college, or department. Typically acts in the absence of their higher level executive.</p> <p>For example, this category might include, but is not limited to, lower level executive positions like Higher level directors; Assistant and Associate VP, Deans [at times if not in cat. 07] etc..</p>
13	<p>Upper level Executive - Typically responsible for the overall multiple operations of major divisions or colleges and serves on the President's senior leadership team on an ongoing basis. Typically directs at the highest level: policies and procedures; problem solving; decision-making; developing highest level strategies, direction, goals, and objectives for divisions, programs, offices, colleges.</p> <p>For example, this category might include, but is not limited to, higher level executive positions like President, Provost, Vice Presidents etc.</p>

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Topic : EMPL-SCD-IRD – BOG Job Structure (#02087) *continued*

Validation Rules/Edits:

If you get any of these errors, then please review the BOG Job Structure Category you have selected for this position.

Sub Code	Table Name	Diag Code	Diagnostic Message	Error Level
EMPL IRD	EDAT EVAC WKPF	0900	If Pay Plan (01037) is graduate assistants (05) or student assistants (09) then BOG Job Structure Category must be Instruction/Research/Work Study Supplementary Personnel (05).	5
EMPL SCD IRD	EDAT EVAC WKPF	0901	If Pay Plan (01037) is Faculty (22) then BOG Job Structure Category must be Instruction/Research/Work Study Supplementary Personnel (05), Faculty (Full-Time) (06), Faculty Administrator – Managerial (07), Professionalized Occupation (08), Professional (09), Lower-Level Executive (12), or Upper-Level Executive (13).	5
EMPL SCD	EDEM	5390	If Senior Management Switch (01020) is Yes (Y) then BOG Job Structure Category must be Faculty (Full-Time) (06), Lower-Level Executive (12), or Upper-Level Executive (13).	5
EMPL SCD	EDEM	5394	If Retirement Code (01047) is Senior Management (UM) then BOG Job Structure Category must Faculty Administrator – Managerial (07), Lower-Level Executive (12), or Upper-Level Executive (13).	5
EMPL SCD IRD	EDEM WKPF	5395	If Tenure Status (01671) is Tenure (1), Non-Tenured, Tenure-Earning (2) , Not Tenured, Not-Tenure Earning (3), Non-Tenured, Tenure-Earning, Not Eligible (4), or Multi-Year (M) then BOG Job Structure Category must be Faculty (Full-Time) (06), Faculty Administrator – Managerial (07), Lower-Level Executive (12), or Upper-Level Executive (13).	5

Note: There were other edits (related to Pay Grade, A&P Indicator) that were proposed at workshop that have been removed because we plan to terminate these elements in the near future.