MANUAL

CTCLINK HCM IPEDS REPORTING PROCEDURES

Revisions

Change reference	Date	Version
Original	12/08/2020	1.0
Added Multiple College District Coding for "district office" employees	03/14/2022	1.1
Added critical date information and IPEDS Date Criteria Description. Added information regarding the new report regarding Undefined Employee Sex value. Added reference to IPEDS Data Available to the colleges in Datalink.	11/29/2022	1.2
Minor changes to improve readability and consistency of terms	01/12/2023	1.3
Minor formatting modification	03/01/2023	1.4
Modified to correct the wrong from of "their" on page-5	03/01/2023	1.5
Actually, completed the change described in VER 1.5	03/07/2023	1.6
Updated references to QARS reporting Categories to reflect changed category names. Added page numbers to page footers.	10/16/2023	1.7
Added section announcing a "trial" preliminary IPEDS load process with some general guidelines on use.	01/26/2024	1.8

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IPEDS HR SURVEY

IPEDS-HR Survey CRITICAL Date Information

Please refer to the Data Collection Schedule and Component Matrix documents at IPEDS Reporting for due date information.

In general, IPEDS-HR survey views of HCM data should be available for the colleges to review via QARS reports and begin work on data cleanup in early November. The earlier data cleanup is started the less rush as the upload date approaches.

The date IPEDS-HR Survey data uploaded to IPEDS is available in the Component Matrix referenced above. It is critical that all colleges have their data ready for upload by this date.

While it is possible for colleges to modify their HR data once it has been uploaded to IPEDS it is not recommended. If you need to make changes in IPEDS, keep in mind that the data available to you via QARS reporting is limited to the values as uploaded. Any changes made to the data in IPEDS will not be reflected in QARS reporting.

IPEDS HCM PeopleSoft "TRIAL" Preliminary Data Upload

To provide a tool to help with the review and corrections of HCM data in preparation for the annual submission of the IPEDS HR Survey, the SBCTC is performing a trial of a Preliminary IPEDS Data Upload process this year.

The SBCTC will do a preliminary upload of your HR data on March 6, 2024. This will allow you to review your data and identify any IPEDS flagged errors, allowing you to modify your HCM data in ctcLink earlier in your data review/cleanup process prior to the "Final Upload" on March 20, 2024.

Any changes made in HCM will be reflected immediately in the **QARS HCM IPEDS Prelim Reports**.

WARNING: The Preliminary HR data uploaded on March 6 and any changes that you make directly in the IPEDS HR survey screens **will not be retained**; it will be overwritten with the Final HR data uploaded on March 20. The preliminary upload provides more time to correct data in HCM.

CAUTION: While it is possible for colleges to modify their Final HR data in the IPEDS screens after it has been uploaded on March 20, it is not recommended. If you need to make changes in IPEDS, keep in mind that the data available to you in the **QARS HCM IPEDS Final Reports** is limited to the values as uploaded on March 20 and will not reflect changes made via IPEDS screens.

IPEDS HCM PeopleSoft Data Verification and Submission Process Information

The process of submitting HR survey data to IPEDS for PeopleSoft colleges is vastly different than in Legacy. In Legacy, colleges would run a job to produce a preliminary report used to validate the numbers. Once the college approved the data, they would run the job in a final mode which created a text file that they then uploaded into the IPEDS system. There was very little interaction with the State Board Data Services team for this survey.

In PeopleSoft, the HR IPEDS data is made available to the colleges through a view in dataLink. There are also edit check reports available in the Quality Assurance Reporting System (QARS) that use this view to provide both the aggregate and unit record detail for each part of the survey. The colleges will no longer upload their data into the IPEDS system; the State Board Data Services will upload all PeopleSoft colleges' data on a pre-determined date announced on the IPEDS list serve.

Below are the steps and details to validate the data prior to the SBCTC submission to IPEDS.

1. Log into QARS and review each IPEDS report:
   o The QARS system requires a username and password. To establish an account.
   o The QARS reporting document is available at QARS Report Guide
   o A "fillable" PDF version of the QARS User Access Request form is available at QARS Access Request Form
   o Submit any questions and/or your completed User Access Request form (one user per attached file please) via e-mail to DataServices@sbctc.edu

2. Review the "Missing or N IPEDSSCODE" report under the category of "HCM IPEDS Prelim Reports" that provides a listing of Job Codes assigned an IPEDSSCODE value of "N" which is excluded from IPEDS reporting. See the IPEDSSCODE section for more details.

3. Review the preliminary reports under the category of "HCM IPEDS Prelim Reports".

   ▪ The reports contain the aggregate data on the first page representing what will be reported to IPEDS.

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- Each report contains a detailed list of staff who are included in the aggregate counts starting on page two to assist in data validation.

- The Datalink data source for these Preliminary reports is the view SBMD.IPEDS_DATA_VW.

4. Review the "Undefined Employee Sex" QARS report, under the category of "HCM Reports", identifying Employee's where the value for Sex is set to "U"-Unknown. An employee's sex should be identified from there I9 data, valid values are "M"-Male, "F"-Female and "X"-Non-binary. See the Undefined Employee SEX section for more details.

5. Correct any data issues found in the preliminary reports and in the "Undefined Employee Sex" report in ctcLink to finalize your data before the system upload deadline specified above.

SBCTC will upload the data into the IPEDS data collection system for all PeopleSoft colleges in one batch and notify you that it is time to edit and lock.

To view prior years' data submitted to IPEDS, the same QARS reports are available under the category of "HCM IPEDS Final Reports". The data in these reports reflects the values uploaded to IPEDS and will not reflect modifications made on the IPEDS pages.

IPEDS Data in DataLink

Working with your IT staff you have access to the IPEDS source data Views and Tables in DataLink. They are:

SBMD.IPEDS_DATA_VW_BASE
SBMD.IPEDS_NEW_HIRES
SBMD.IPEDS_DATA_VW
SBMD.EMPLOYEE_RACE_ETHNICITY
SBMD.PS_JOBCODE_VW

SBMD.IPEDS_DATES

IPEDS Date Criteria Description

There are two key date criteria in the IPEDS HR Reporting Process.

The "AS OF DATE" (Nov. 1 of reporting year). Active employees on this date are all considered by the extract process. Employees separated prior to this date or hired after this date are not considered.

The "NEW HIRES/REHIRES DATE RANGE" (Nov. 1 of previous year through day prior to "AS-OF-DATE" normally 11/1 of previous year through 10/31 of

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reporting year).   2021 reporting required reporting of any new hires/rehires during the reporting time frame even if not employed on 11/1/2021. In 2022 reporting has changed, new hires/rehires during the reporting time frame are to be reported only if employed on Nov 1 of the reporting year.

IPEDSSCODE

The IPEDSSCODE found in the JOBCODE_TBL is a primary data element used for reporting the number of staff per the IPEDS Occupational Categories.

Each active job should be assigned an IPEDSSCODE from the following list. Any jobs coded with an IPEDSSCODE of "N" are not submitted to IPEDS.

Value	Description
2	Instruction (Research/Public Service)
A	Management
B	Business/Financial Operations
C	Computer/Engineering/Science
D	Comm Service/Legal/Arts/Media
E	Student and Academic Services
I	Instruction
J	Librarians
K	Library Technicians
L	Non-postsecondary Teaching
M	Healthcare Practitioners & Tec
N	No IPEDS-S Reporting
O	Service
P	Public Service
Q	Sales and Related
R	Research
S	Office/Administrative Support
T	Natural Resource/Construct/Mnt
U	Production/Transport/Material

There is an edit check report available in QARS under the category of "HCM IPEDS Prelim Reports" that provides a listing of Job Codes assigned an IPEDSSCODE value of "N" or those missing an IPEDSSCODE. The Datalink data source for this report is the view SBMD.IPEDSSCODE_N_VW.

Please verify using this report that the Job Codes should be excluded from IPEDS reporting. If the Job should be reported to IPEDS, please update the IPEDSSCODE for that job in the Job Code Table in ctcLink.

To access this table, please navigate as follows: HCM>Set Up HCM>Foundation Tables>Job Attributes>Job Code Table. Once there, enter

correct SET ID and the job code needing to be updated and click search. Job Code Profile detail will display for the requested job code.

To view IPEDSSCODE on this screen, scroll down and expand the area directly below union code field by clicking the arrow next to USA Flag icon.

For additional information on how to update job codes, please refer to the following QRG: [Creating and Updating Job Codes](#)

Undefined Employee SEX

Review the "Undefined Employee Sex" report in QARS, under the "HCM Report" Category. These undefined SEX values need to be corrected to ensure accurate reporting of Employees SEX to State and Federal data consumers.

NOTE*:* Multi-college Districts 060, 110 and 170, you can choose any of your colleges in QARS and the Undefined Sex Report will return all employees across your district with SEX value of "U".

Valid values for Employee SEX in HCM are "F"-Female, "M"-Male, "X"-Non Binary, while "U"-Undefined is valid in HCM it is not accurately reportable to other agencies. Employee SEX of "U"-Undefined is reported to IPEDS as "M"-Male. IPEDS currently does not accept the "X" value, which may change in future reporting cycles, at this time "X" is being reported as "F" to IPEDS.

Multiple College District Coding

With the conversion of the last multi-college district to the ctcLink system and the new process for submitting HR data to IPEDS, the three effected districts, with confirmation from IPEDS & SBCTC selected a uniform solution.

Employees in a job identified as being part of a "District Office", by the BUSINESS_UNIT on the job, will be reported to IPEDS as belonging to the "IPEDS Extract Institution" from the table below, e.g. an employee in a job with BUSINESS_UNIT of HR060, will be reported as part of the institution HR062.

Job Record Company	Job Record Business Unit	IPEDS Extract Institution
060	HR060	HR062
060	HR062	HR062
060	HR063	HR063
060	HR064	HR064
170	HR170	HR171
170	HR171	HR171
170	HR172	HR172
110	HR110	HR110
110	HR111	HR110
110	HR112	HR110

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IPEDS HR Survey FAQ

1. Why is Academic Rank being set to "6"-No Academic Rank in the 2022 reporting when it was set to "4"-Instructors in the 2021 reporting?

   o Defaulting to "4"- Instructors was an incorrect setting in 2021, this year's reporting will return to defaulting to "6"- No Academic Rank. Plans for 2023 include more accurately identify value for this column.

2. Why is the Primary Instruction Code being set to "Combined for Credit/Not for Credit"?

   o Based on IPEDS instructions it is the appropriate setting for our colleges. We are currently unable to definitively identify an instructor as teaching only "For Credit" or "Not For Credit". IPEDS suggests the "Combined for Credit/Not for Credit" setting in cases where an accurate determination cannot be made. We are looking for a future resolution.

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