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  
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/](https://surveys.nces.ed.gov/ipeds/)

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

<table>
<thead>
<tr>
<th>Change</th>
<th>Implementation Year</th>
<th>Source</th>
<th>Estimated burden</th>
</tr>
</thead>
</table>
| Add the following item to collect data on veterans:  
  - Which of the following are available to veterans, military service members, or their families?  
    - 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 | 2014-15 | Veterans TRP (2013-14 preview year) | Minimal |
| Add screening question for degree-granting institutions to determine level of reporting on new Academic Libraries component:  
  - What are your annual total library expenditures?  
    - 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. | 2014-15 | Academic Libraries TRP (2013-14 preview year) | Minimal |
| Delete Estimated Enrollment Items | 2014-15 | NCES, public comments | Slight decrease |
| 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.  
  - 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 | 2014-15 | Calendar TRP | No change in burden. Change in when data are collected. |
(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)

<table>
<thead>
<tr>
<th>Change</th>
<th>Implementation Year</th>
<th>Source</th>
<th>Estimated burden</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add the following items:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• 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</td>
<td>2014-15</td>
<td>Veterans TRP</td>
<td>Moderate</td>
</tr>
<tr>
<td>• 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</td>
<td>(2013-14 preview year)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### 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

<table>
<thead>
<tr>
<th>Change</th>
<th>Implementation Year</th>
<th>Source</th>
<th>Estimated burden</th>
</tr>
</thead>
<tbody>
<tr>
<td>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.</td>
<td>2014-15</td>
<td>Calendar TRP</td>
<td>No change in burden. Change in when data are collected.</td>
</tr>
</tbody>
</table>

• 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.

<table>
<thead>
<tr>
<th>Change</th>
<th>Implementation Year</th>
<th>Source</th>
<th>Estimated burden</th>
</tr>
</thead>
<tbody>
<tr>
<td>Make changes to Revenues information collected</td>
<td>2014-15</td>
<td>Finance TRP</td>
<td>Significant increase (2013-14 preview year)</td>
</tr>
<tr>
<td>• Separate federal appropriations, grants, and contracts into two categories:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>o Federal appropriations</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>o Federal grants and contracts</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Separate state and local government appropriations, grants, and contracts into four</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>categories:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>o State appropriations</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>o State grants and contracts</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>o Local appropriations</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>o Local grants and contracts</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Add private gifts to be reported with private grants and contracts</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Add the following two revenues categories:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Hospital services</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Independent operations revenue</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Make changes to Expenses information collected:

<table>
<thead>
<tr>
<th>2014-15</th>
<th>Finance TRP</th>
<th>Significant increase</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>(2013-14 preview year)</td>
</tr>
</tbody>
</table>

- Separate research and public service into two categories:
  - Research
  - Public service
- Separate academic support, student services, and institutional support into three categories:
  - Academic support
  - Student services
  - Institutional support
- Add the following new functional expense categories:
  - 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:
  - Salaries and wages
  - Employee fringe benefits
  - Operations and maintenance
  - Interest
  - Depreciation
  - All other
- Add a new screening question:
  - What is your business structure?
    - 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:
      - Total Federal income tax expenditures
      - Total state and local income tax expenditures

### Make changes to Scholarships and Fellowships information collected:

<table>
<thead>
<tr>
<th>2014-15</th>
<th>Finance TRP</th>
<th>Significant increase</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>(2013-14 preview year)</td>
</tr>
</tbody>
</table>

- Separate state and local grants (government) into two categories:
  - Grants by state government
  - Grants by local government

### Make changes to Balance Sheet information collected:

<table>
<thead>
<tr>
<th>2014-15</th>
<th>Finance TRP</th>
<th>Significant increase</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>(2013-14 preview year)</td>
</tr>
</tbody>
</table>

- Add the following new categories:
  - Long-term investments
  - Property, plant, and equipment, net of accumulated depreciation
  - Intangible assets, net of accumulated amortization
  - Debt related to property, plant, and
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.

<table>
<thead>
<tr>
<th>Change</th>
<th>Implementation Year</th>
<th>Source</th>
<th>Estimated burden</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add items for degree-granting institutions if expenditures &gt; 0:</td>
<td>2014-15</td>
<td>Academic Libraries TRP</td>
<td>Moderate</td>
</tr>
<tr>
<td>- Is the library collection entirely electronic? (Y/N)</td>
<td>(2013-14 preview year)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Collect library collections counts, physical and digital/electronic, as applicable:</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Books

- Circulation, physical and digital/electronic, as applicable

Add items for degree-granting institutions if expenditures are > $100,000:

- 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?

<table>
<thead>
<tr>
<th>Add items for degree-granting institutions if expenditures are &gt; $100,000:</th>
<th>2014-15 (2013-14 preview year)</th>
<th>Academic Libraries TRP</th>
<th>Moderate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of branch and independent libraries—exclude main or central library</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total salaries and wages</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Are staff fringe benefits paid out of the library budget? (Y/N)</td>
<td></td>
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<tr>
<td>Fringe benefit expenditures if paid by the library budget</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>One-time purchases of books, serial backfiles and other materials</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ongoing commitments to subscriptions</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Other information resources</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Preservation services</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>All other operations and maintenance expenditures</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total interlibrary loans and documents provided to other libraries</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total interlibrary loans and documents received</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Does your library support virtual reference services?</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**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-
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

<table>
<thead>
<tr>
<th>Change</th>
<th>Implementation Year</th>
<th>Source</th>
<th>Estimated burden</th>
</tr>
</thead>
<tbody>
<tr>
<td>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.</td>
<td>2015-16 (2014-15 preview year)</td>
<td>Outcome Measures TRPs</td>
<td>Substantial</td>
</tr>
</tbody>
</table>

- Full-time, first-time students
- Part-time, first-time students
- Full-time, non-first-time entering students
- Part-time, non-first-time entering students

Note: Data will not be disaggregated by race, ethnicity, or gender.

Note: No outcome data will be collected from non-degree-granting institutions.

For each of the 4 cohorts, collect a status update using the following categories:

- 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

A total of students who did not receive an award will be calculated.

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.
General – SUDS Due Dates

Description: Due Dates for 2014-2015 Standard Files
Topic ID: 50-10
Initiator: Board-IRM
Affects: N/A

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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 againt 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 exist 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.