SBCTC IPEDS HR

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 update language and correct typo	03/01/2023	1.5, 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
Updated the "trial" IPEDS-HR preliminary to permanent. Reworded text that differentiated between Legacy and PeopleSoft colleges, all colleges are now on ctcLink. Removed invalid IPEDSSCODE's from the table of valid codes. Added and reformatted text regarding IPEDSSCODE and SEX	2/10/2025	2.0
Updated QARS report and category names. Updated "NEW HIRES/REHIRES DATE RANGE" section.	3/10/2025	2.1

Contacts

Data Services
dataservices@sbctc.edu

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IPEDS HR SURVEY

CRITICAL Date Information

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

In general, IPEDS-HR survey views of HCM data should be available for the colleges to review via Quality Assurance Reporting System (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.

Preliminary Data Upload

To provide a tool to help with the review and corrections of ctcLink HCM data in preparation for the annual submission of the IPEDS HR Survey, the SBCTC will perform a Preliminary IPEDS Data Upload.

The SBCTC will do a preliminary upload of your HR data approximately two weeks prior to the final upload. The exact date will be communicated in the annual Reminder & Instructions e-mail. This will allow you to review your data and identify any IPEDS flagged errors, allowing you to modify your HCM data in ctcLink during the data review/cleanup period prior to the "Final Upload."

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

WARNING: The Preliminary HR data uploaded 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 upload. The preliminary upload provides more time to correct data in ctcLink HCM prior to final upload.

CAUTION: While it is possible for colleges to modify their Final HR data in the IPEDS screens after it has been uploaded, 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 uploaded when the final upload occurs, and will not reflect changes made in the IPEDS screens.

Lessons Learned: Our first IPEDS-HR Preliminary process was performed for the 2023-24 reporting cycle and proved to be helpful in identifying issues earlier and providing more time for modification to HCM data. We did identify a couple of issues that we will need to handle differently going forward:

1. The preliminary and final uploads must include all colleges. Excluding a college from either upload process is both time consuming and error prone.

2. If you have IPEDS modifications in the Preliminary data, it is advised to save reports from the Preliminary data to help in re-entering your modifications in the uploaded data.

IPEDS HR Data Verification and Submission Process Information

The IPEDS HR data is made available to the colleges through a view in dataLink (SBMD.IPEDS_DATA_VW). There are also edit check reports available in QARS that use this view to provide both the aggregate and unit record detail for each part of the survey. The State Board Data Services will upload all colleges' data on a pre-determined date in preliminary mode, followed approximately two weeks later by the final upload. The dates will be 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:

    - The QARS system requires a username and password. To establish an account, a "fillable" PDF version of the QARS User Access Request form is available at QARS Access Request Form.

    - Submit any questions and/or your completed User Access Request form (one user per attached file please) via e-mail to DataServices@sbctc.edu

    - The QARS reporting document is available at QARS Report Guide

2. Review the following three reports. Please note that two reports are under the category of "**HCM IPEDS: Prelim Reports**" while one is under the category of "**DW Snapshot: Employee Job Warnings**." These reports will provide listings of potential coding issues in your HCM data. They should be evaluated to determine if they are correctly coded for your college or if they need to be modified.

    > A subsequent section "Data Verification Detail" will provide additional information and links to Quick Reference Guides (QRG) for each field being reported.
    > - **HCM IPEDS: Prelim Reports**
    >   - 9090 - IPEDS HR: JOBCODE Count of IPEDS S Codes by EEO Category
    >   - 9099 - IPEDS HR: JOBCODE with IPEDS S CODE of N or Missing
    > - **DW Snapshot: Employee Job Warnings**
    >   - 3580 - Employee Job Warnings: Employee with Undefined Sex

3. Review the preliminary reports under the category of "**HCM IPEDS: Prelim Reports**." From "**9000 - IPEDS HR PART A2: Full-time Instructional Staff by Function**" through "**9080 - IPEDS HR PART H2: New hires by Occupational Description and Gender/Ethnicity**"

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

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

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

4. Correct any data issues found in the preliminary reports and in the "Undefined Employee Sex" report in ctcLink HCM to finalize your data before the scheduled system final upload deadline.

SBCTC will upload the data into the IPEDS data collection system for all colleges in one batch and notify them when it is ready 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. 2 of previous year through Nov. 1 of 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 was changed, New hires/rehires during the reporting time frame are to be reported only if employed on Nov. 1 of the reporting year.

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

DATA VERIFICATION REPORTING DETAIL INFORMATION

IPEDS S CODE

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. Please verify using QARS report "**9099 - IPEDS HR: JOBCODE with IPEDS S CODE of N or Missing**" 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 HCM.

QARS Validation Report:

9090 - IPEDS HR: JOBCODE Count of IPEDS S Codes by EEO Category

This report provides a count of IPEDS S CODES by EEO Category, an overview of your JOBCODE data for a reasonableness check. Do the counts seem reasonable for your institution?

9099 - IPEDS HR: JOBCODE with IPEDS S CODE of N or Missing

Provides a listing of Job Codes assigned an IPEDSSCODE value of "N" or those missing an IPEDSSCODE. The Datalink source for this report is the view SBMD.IPEDSSCODE_N_VW.

Data Source:

SYSADM_HCM.PS_JOBCODE_TBL.IPEDSSCODE

Datalink data source is the view SBMD.IPEDSSCODE_N_VW

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

Value	Description
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
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

SEX

PS_EMPLOYEES.SEX is a primary field for the reporting of Employees by gender. Valid values are (F, M or X), these errors need to be correct to ensure accurate reporting of Employees SEX to Federal and State data consumers.

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.

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".

QARS Validation Report:

3580 - Employee Job Warnings: Employee with Undefined Sex

Data Source:

SYSADM_HCM.PS_EMPLOYEES.SEX

IPEDS HR Survey FAQ

1. Why is Academic Rank being set to "6"-No Academic Rank beginning with 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. It is now defaulting to "6"- No Academic Rank. The Academic Rank field in HCM is an optional field that not all colleges are using so it has not yet been leveraged for IPEDS HR reporting but may be in the future.

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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