

Client Support Guide for the Spring IPEDS 2018-2019

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General Details: OnlineSMART.net provides a number of reports that can be used to provide the figures necessary for reporting on the 2018/2019 Spring IPEDS survey. The Spring IPEDS reports for 2018/2019 submittal that are provided in OnlineSMART.net are: [Fall Enrollment – Part A](#), [Fall Enrollment – Part B](#), [Fall Enrollment – Part C](#), [Fall Enrollment – Part E](#), [Finance – Part C](#), and [Finance – Part D](#). The information generated on these reports is based on data input into students' profiles and ledgers, and relies on the fact that information has been correctly input into those areas of the system. Inputting incorrect data on students' profiles and/or ledgers will result in inconsistent or inaccurate data, so ensuring data is input properly should be your number one priority when considering utilizing the reports that OnlineSMART.net will provide. These reports are coded to exclude students that are in a course without a CIP code, so please keep that in mind when querying the below reports.

This guide will break down each report that is found within OnlineSMART.net for the 2018/2019 Spring IPEDS and outline the data being pulled in particular so you may audit your data accordingly.

Exclusions from the IPEDS:

1. These reports exclude any student in a course with no CIP code. If the student's course does require a CIP code, make sure that it has been entered under **Administration > Course > CIP Code**; if the course is not supposed to have a CIP code, enter a zero (0).
2. These reports exclude any student who dropped within 4 days if they are in a course less than 900 Hrs, and 14 Days if they are in a course greater the 900 Hrs.
3. These reports exclude any student who dropped due to Death, Permanent Disability, Church Mission, Active Military and Fed Govt Serv Foreign Aid mission (Drop Codes S*, T*, V*, W*,and X*).

Fall Enrollment – Part A

The Fall Enrollment – Part A report provides figures based on students that have a start date within the date range of 8/1/2018 to 10/31/2018, as well as based on their enrollment type (Full time, part time, half time, $\frac{3}{4}$ time). Depending on how your school defines your enrollment types, you can select the Full Time Includes drop down menu to select varying enrollment types that should be included in the calculation of the students reported on, and then hit the View Report button to re-run the report with your updated selection. Once the report is generated, it will break down the students that started within the date range specified above by Race, Sex and Grade Level. Whereas students with a grade level of First Time, Never Attended are included in their own column titled *First Time, Certificate Seeking*, any students with a grade level other than First Time, Never Attended will be included under the *All Other* column. You can audit your numbers by making sure all students who started in the reporting date range have a grade level, enrollment type, race and gender selected on their profile

See below for query instructions for this report.

[PART A – Fall Enrollment for Full-Time Undergraduate Students](#)

Column 1: First Time, Certificate Seeking

1. **Reports (Query) > Student > General Report**
 - a. **Personal (Grade Level = First Year, Never Attended)**
 - b. **Dates (Start Date = 8/1/2018 – 10/31/2018)**
 - c. **Courses (Enrollment Type = Full Time)**
 - d. **Personal (Race/Sex [Used to verify numbers shown])**

Column 2: All Other

1. **Reports (Query) > Student > General Report**
 - a. **Courses (Enrollment Type = Full Time);**
 - b. **Flags (Is Active On = 8/1/2018 – 10/31/2018);**
 - c. **Personal (Race/Sex [Used to verify numbers shown])**

[PART A – Fall Enrollment for Part-Time Undergraduate Students](#)

Column 1: First Time, Certificate Seeking

1. **Reports (Query) > Student > General Report**
 - a. **Personal (Grade Level = First Year, Never Attended);**
 - b. **Dates (Start Date = 8/1/2018 – 10/31/2018);**
 - c. **Courses (Enrollment Type = Part Time);**
 - d. **Personal (Race/Sex [Used to verify numbers shown])**

Column 2: All Other

1. **Reports (Query) > Student > General Report**
 - a. **Courses (Enrollment Type = Part Time);**
 - b. **Flags (Is Active On = 8/1/2018 – 10/31/2018);**
 - c. **Personal (Race/Sex [Used to verify numbers shown])**

Depending on what the school deems as Full Time, the above queries may differ.

NOTE: When running the query reports, exclude any students that are not in a course with a CIP code. This report will exclude students who fall within the early drop exceptions per IPEDS instructions, and will exclude students who are in a course without a CIP code. Also, be sure to exclude any duplicates as needed.

[Fall Enrollment – Part B](#)

The Fall Enrollment – Part B report provides figures based on full time students that have a start date within the date range of 8/1/2018 to 10/31/2018. The report separates the counts for men and women, then determines what age they would be (per their Date of Birth) as of 8/1/2018 and breaks down the

results by ages groups ranging from Under 18, 18-19, 20-21, 22-24, 25-29, 30-34, 35-39, 40-49, 50-64, and 65 and over.

See below for query instructions for this report.

PART B - Fall Enrollment by Age and Gender for Full-time Undergraduate Students

Column 1: Men

1. Reports (Query) > Student > General Report
 - a. Personal (Sex = Male);
 - b. Personal (DOB = See Below);
 - c. Course (Enrollment Type = Full Time);
 - d. Flags (Is Active On = 8/1/2018 – 10/31/2018)

Column 2: Women

1. Reports (Query) > Student > General Report
 - a. Personal (Sex = Female);
 - b. Personal (DOB = See Below);
 - c. Course (Enrollment Type = Full Time);
 - d. Flags (Is Active On = 8/1/2018 – 10/31/2018)

PART B - Fall Enrollment by Age and Gender for Part-time Undergraduate Students

Column 1:

1. Reports (Query) > Student > General Report
 - a. Personal (Sex = Male);
 - b. Personal (DOB = See Below);
 - c. Course (Enrollment Type = Part Time);
 - d. Flags (Is Active On = 8/1/2018 – 10/31/2018)

Column 2:

1. Reports (Query) > Student > General Report
 - a. Personal (Sex = Female);
 - b. Personal (DOB = See Below);
 - c. Course (Enrollment Type = Part Time);
 - d. Flags (Is Active On = 8/1/2018 – 10/31/2018)

Under 18 = DOB 8/2/2000 and earlier

18-19 = DOB 8/2/1998 - 8/1/2000

20-21 = DOB 8/2/1996 - 8/1/1998

22-24 = DOB 8/2/1993 - 8/1/1996

25-29 = DOB 8/2/1988 - 8/1/1993

30-34 = DOB 8/2/1983 - 8/1/1988

35-39 = DOB 8/2/1978 - 8/1/1983

40-49 = DOB 8/2/1968 - 8/1/1978

50-64 = DOB 8/2/1953 - 8/1/1968

65+ = DOB 8/1/1953 and later

Depending on what the school deems as Full Time, the above queries may differ.

NOTE: When running the query reports, exclude any students that are not in a course with a CIP code. This report will exclude students who fall within the early drop exceptions per IPEDS instructions, and will exclude students who are in a course without a CIP code.

Fall Enrollment – Part C

The Fall Enrollment – Part C report provides figures on first time degree/certificate seeking undergraduate students who had start dates within the date range of 8/1/2018 to 10/31/2018, and of those students who had enrolled within 12 months of their high school graduation date or receiving their GED. Students who meet the first criteria are included under column 1, and students who meet both criteria are included under column 2 and divided based on their state of residence when the student was first admitted.

See below for query instructions for this report.

PART C - Residence of First-time Undergraduates

Column 1:

1. Reports (Query) > Student > General Report

- a. Name (State = dependent on row);**
- b. Personal (Grade Level = First Year, Never Attended);**
- c. Dates (Start Date = 8/1/2018 – 10/31/2018)**

Column 2:

1. Use same general report from column 1;

- a. If student is included in column 1, AND has a start date equal to or less than 12 months of their High School Grad/GED date, then include them in column 2.**

NOTE: When running the query reports, exclude any students that are not in a course with a CIP code. This report will exclude students who fall within the early drop exceptions per IPEDS instructions, and

will exclude students who are in a course without a CIP code. Also, be sure to exclude any duplicates as needed.

Fall Enrollment – Part E

The Fall Enrollment – Part E report provides figures on full time/part time students who are first time degree/certificate seeking undergraduate students, and determines of those students who is still enrolled or had completed their program as of 8/1/2018. Depending on how your school defines your enrollment types, you can select the Full Time Includes drop down menu to select varying enrollment types that should be included in the calculation of the students reported on, and then hit the View Report button to re-run the report with your updated selection. Many fields on this report will be autofilled by IPEDS, but will be based off of prior year data (Fall 2017 Cohort), as well as the data provided in the other IPEDS reports.

See below for query instructions for this report.

PART E – First-Time Student Cohort Retention Rates (Full-Time)

E1: Full-time, first-time Fall 2017 Cohort

1. Reports (Query) > Student > General Report

- a. **Personal (Grade Level = First Year, Never Attended);**
- b. **Dates (Start Date = 8/1/2017 – 10/31/2017);**
- c. **Course (Enrollment Type = Full Time)**

E2: Exclusions from the Fall 2017 cohort

Please see the IPEDS Exclusions on page 1 for more details.

E4: Students from Fall 2017 cohort who are still enrolled + students from Fall 2017 cohort who completed their program as of Fall 2018

1. Reports (Query) > Student > General Report

- a. **Personal (Grade Level = First Year, Never Attended);**
- b. **Dates (Start Date = 8/1/2017 – 10/31/2017);**
- c. **Course (Enrollment Type = Full Time);**
- d. **Flags (Is Active On = 8/1/2018)**

1. Reports (Query) > Student > General Report

- a. **Personal (Grade Level = First Year, Never Attended);**
- b. **Dates (Start Date = 8/1/2017 – 10/31/2017);**
- c. **Dates (Actual Grad Date = 8/1/2017 – 8/1/2018);**
- d. **Course (Enrollment Type = Full Time)**

PART E - First-Time Student Cohort Retention Rates (Part-Time)

E1 = Part-time, first-time Fall 2017 cohort

- 1. Reports (Query) > Student > General Report**
 - a. Personal (Grade Level = First Year, Never Attended);**
 - b. Dates (Start Date = 8/1/2017 – 10/31/2017);**
 - c. Course (Enrollment Type = Part Time)**

E2: Exclusions from the Fall 2017 cohort

Please see the IPEDS Exclusions on page 1 for more details.

E4 = Students from Fall 2017 cohort who are still enrolled + students from Fall 2017 cohort who completed their program as of Fall 2018

- 1. Reports (Query) > Student > General Report**
 - a. Personal (Grade Level = First Year, Never Attended);**
 - b. Dates (Start Date = 8/1/2017 – 10/31/2017);**
 - c. Course (Enrollment Type = Part Time);**
 - d. Flags (Is Active On = 8/1/2018)**
- 2. Reports (Query) > Student > General Report**
 - a. Personal (Grade Level = First Year, Never Attended);**
 - b. Dates (Start Date = 8/1/2017 – 10/31/2017);**
 - c. Dates (Actual Grad Date = 8/1/2017 – 8/1/2018);**
 - d. Course (Enrollment Type = Part Time)**

Depending on what the school deems as Full Time, the above queries may differ.

NOTE: When running the query reports, exclude any students that are not in a course with a CIP code. This report will exclude students who fall within the early drop exceptions per IPEDS instructions, and will exclude students who are in a course without a CIP code. Also, be sure to exclude any duplicates as needed.

Finance – Part C

The Finance – Part C report provides figures on the total amount(s) of aid provided to students within the date range of 7/1/2017 to 6/30/2018 and categorizes each type of aid into an applicable row based on the program/allocation used on student ledger postings within that period. This report will list these findings into 7 different rows, one of which we do not track in OnlineSMART.net: **Pell grants (federal); Other federal grants (Do NOT include FDSL amounts); State grants; Local grants (government); Institutional grants; Total student grants; Allowances applied to tuition and fees; and Allowances applied to auxiliary enterprise revenues**, which we do not track in OnlineSMART.net as much of this information should be obtained from your audited financial statement as submitted to the Department of Education.

See below for query instructions for this report.

PART C - Scholarships and Fellowships

01: Pell grants (federal)

1. **Reports (Standard) > Ledger > Program Summary > Program Summary Date Range**
 - a. **Start/End Date = 7/1/2017 – 6/30/2018;**
 - b. **Program Code = PELL**

02: Other federal grants (Do NOT include FDSL amounts)

1. **Reports (Standard) > Ledger > Program Summary > Program Summary Date Range**
 - a. **Start/End Date = 7/1/2017 – 6/30/2018;**
 - b. **Program Code = FSEOG**

03a: State grants

Add the following totals together for this row -

1. **Reports (Standard) > Ledger > Program Summary > Program Summary Date Range**
 - a. **(Start/End Date = 7/1/2017 – 6/30/2018;**
 - b. **Program Code = S Grant**
2. **Reports (Standard) > Ledger > Program Summary > Program Summary Date Range**
 - a. **Start/End Date = 7/1/2017 – 6/30/2018;**
 - b. **Program Code = S Scholarship**

03b: Local Grants (Government)

Add the following totals together for this row -

1. **Reports (Standard) > Ledger > Program Summary > Program Summary Date Range**
 - a. **Start/End Date = 7/1/2017 – 6/30/2018;**
 - b. **Program Code = LG Grant**
2. **Reports (Standard) > Ledger > Program Summary > Program Summary Date Range**
 - a. **Start/End Date = 7/1/2017 – 6/30/2018;**
 - b. **Program Code = LG Scholarship**

04: Institutional grants

1. **Reports (Standard) > Ledger > Program Summary > Program Summary Date Range**
 - a. **Start/End Date = 7/1/2017 – 6/30/2018;**
 - b. **Program Code = Inst Scholarship**
 - c. *In the event that schools use Scholarships/Grants program codes, the above can be added to the totals for Scholarships and/or Grants totals by running the same report for each applicable program.*

06: Allowances applied to tuition and fees

Add the following totals together for this row -

1. Reports (Standard) > Ledger > Program Summary > Program Summary Date Range
 - a Start/End Date = 7/1/2017 – 6/30/2018;
 - b Program Code = S Grant
2. Reports (Standard) > Ledger > Program Summary > Program Summary Date Range
 - a Start/End Date = 7/1/2017 – 6/30/2018;
 - b Program Code = S Scholarship
3. Reports (Standard) > Ledger > Program Summary > Program Summary Date Range
 - a Start/End Date = 7/1/2017 – 6/30/2018;
 - b Program Code = LG Grant
4. Reports (Standard) > Ledger > Program Summary > Program Summary Date Range
 - a Start/End Date = 7/1/2017 – 6/30/2018;
 - b Program Code = LG Scholarship
5. Reports (Standard) > Ledger > Program Summary > Program Summary Date Range
 - a Start/End Date = 7/1/2017 – 6/30/2018;
 - b Program Code = Inst Scholarship

NOTE: When running the query reports, exclude any students that are not in a course with a CIP code. This report will exclude students who fall within the early drop exceptions per IPEDS instructions, and will exclude students who are in a course without a CIP code.

Finance – Part D

The Finance – Part D report provides figures that indicate source of revenue that is collected per the students' ledger statements, and has many areas that are either filled by IPEDS or not tracked by SMART. This section is difficult to audit as it totals all ledger postings that are allocated to tuition, books, equip/tools/kit and fees, and there is no single report that, unless you were to add up each student's ledger posts within the reporting period, include any of those allocated funds.

We are able to audit this on your behalf for a charge to ensure that the ledger postings in your database are input accurately for the purpose of verifying this number provided is correct. Please contact the SMART Support department for more information at 1-800-245-5230, and select Option 1 for Support.