

Client Support Guide for the Spring IPEDS 2019-2020

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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 **2019/2020 Spring IPEDS survey**. The Spring IPEDS reports for 2019/2020 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](#)
- [Finance – Part D](#)

These reports are for the following sections of IPEDS

- [Fall Enrollment](#)
- [Finance](#)

The information generated on these reports is based on data input into students' profiles, and relies on the fact that information has been correctly input into those areas of the system. Inputting incorrect data on students' profiles will result in inconsistent or inaccurate data, so ensuring data is input properly should be your number one priority when utilizing the reports that OnlineSMART.net provides. These reports are coded to exclude students that are in a course without a CIP code, so please keep that in mind when verifying numbers or querying any reports to associate them.

This guide will break down each report that is found within OnlineSMART.net for the 2019/2020 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. These students can be found on the Student List reports associated to either 12-month Enrollment or Fall Completions.

Fall Enrollment

This report looks at your students that were active between 8/1/2019 and 10/31/2019 and further categorizes them.

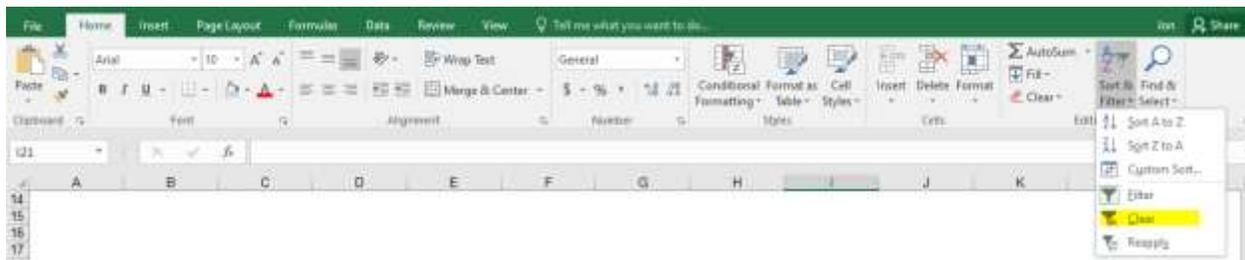
It is important that you make sure all students have a **Sex, Race, Enrollment Status, Grade Level, and Original Start Date** so that this report pulls accurate results.

If a student has more than one active record during the date range, they will be counted for each record. If this is the case, you will need to subtract the duplicated students from their overall count on this report.

The Fall Enrollment List of Students is provided to assist in detailing which students make up the numbers in OnlineSMART. To confirm these numbers, perform the following tasks:

- 1) Export the Fall Enrollment List of Students to Excel, changing the **Start Date to 8/1/2019**, **End Date to 10/31/2019** and **As of Date to 8/1/2019**.
- 2) Click into Cell A1 and within the **Home** tab, go to **Sort & Filter** and click the **Filter** icon

Before verifying each listed task, make sure to clear the filters to ensure you have a clean starting point. This is done in Excel under Home > Sort & Filter > Clear



Part A

- For the First-Time, certificate seeking Full Time Undergraduate Students:
 - Filter Enrollment Status (Column G) for FULL
 - Filter Grade Level (Column H) for First Year, Never Attended
 - Filter Original Start Date to check only those within August 2019 to October 2019.
 - Further filter by Sex (Column E) and Race (Column F) in accordance to what you're searching for.
- For the All Other Full Time Undergraduate Students:
 - Filter Enrollment Status (Column G) for FULL
 - Remove the First-Time, certificate seeking Full Time Undergraduate Students from this list.
 - Further filter by Sex (Column E) and Race (Column F) in accordance to what you're searching for.
- For the Part-Time, certificate seeking Full Time Undergraduate Students:
 - Filter Enrollment Status (Column G) for PART
 - Filter Grade Level (Column H) for First Year, Never Attended
 - Filter Original Start Date to check only those within August 2019 to October 2019.

- Further filter by Sex (Column E) and Race (Column F) in accordance to what you're searching for.
- For the All Other PART Time Undergraduate Students:
 - Filter Enrollment Status (Column G) for PART
 - Remove the First-Time, certificate seeking Full Time Undergraduate Students from this list.
 - Further filter by Sex (Column E) and Race (Column F) in accordance to what you're searching for.

Part B

- For the Fall Enrollment by Age and Gender for **Full-time** Undergraduate Students
 - Filter the Enrollment Status (Column G) for FULL (and any additional statuses deemed as full time).
 - Further filter by Sex (Column E) and Age (Column R) in accordance to what you're searching for.
- For the Fall Enrollment by Age and Gender for **Part-time** Undergraduate Students
 - Filter the Enrollment Status (Column G) for PART (and any additional statuses not deemed as full time).
 - Further filter by Sex (Column E) and Age (Column R) in accordance to what you're searching for.

Part C

- For the Total first-time degree/certificate seeking undergraduates
 - Filter Grade Level (Column H) for First Year, Never Attended
 - Filter Original Start Date (Column I) to only include August, September and October of 2019.
 - Filter Residence State (Column S) for the state abbreviation in accordance to what you're searching for.
- For those who enrolled within 12 months of high school graduation or receiving their GED
 - Maintain the same filtered list above
 - Filter Start within 12 Months (Column U) to only include 'Y'

Part E

As the cohort of students is viewed separately, a new Fall Enrollment List of Students must be generated.

- 1) Export the Fall Enrollment List of Students to Excel, keeping the default dates by setting **Start Date to 8/1/2018**, **End Date to 10/31/2018** and **As of Date to 8/1/2019**.
- 2) Click into Cell A1 and within the **Home** tab, go to **Sort & Filter** and click the **Filter** icon

First-Time Student Cohort Retention Rates (Full-Time)

- For E1 Full-time, first-time Fall 2018 cohort

- Filter Enrollment Status (Column G) for FULL (and any additional statuses deemed as full time).
- Filter Grade Level (Column H) for First Year, Never Attended
- Filter Original Start Date (Column I) to only include August, September and October of 2018.
- For E2 Exclusions from the Fall 2018 Cohort
 - Retain the list of students from E1
 - Filter Exclusions (Column V) to only include 'Y'
- For E4 Students from Fall 2018 cohort who are still enrolled...
 - Retain the list of students from E1
 - First get a count of all still enrolled
 - Filter Still Enrolled (Column W) to only include 'Y'
 - Next, get a count of all students that graduated
 - Revert list of students back to E1
 - Filter Actual Grad Date (Column J) to exclude (Blank) and dates in excess of 8/1/2019.
 - Add still enrolled to graduated students.

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

- For E1 Part-time, first-time Fall 2018 cohort
 - Filter Enrollment Status (Column G) for PART (and any additional statuses not deemed as full time).
 - Filter Grade Level (Column H) for First Year, Never Attended
 - Filter Original Start Date (Column I) to only include August, September and October of 2018.
- For E2 Exclusions from the Fall 2018 Cohort
 - Retain the list of students from E1
 - Filter Exclusions (Column V) to only include 'Y'
- For E4 Students from Fall 2018 cohort who are still enrolled...
 - Retain the list of students from E1
 - First get a count of all still enrolled
 - Filter Still Enrolled (Column W) to only include 'Y'
 - Next, get a count of all students that graduated
 - Revert list of students back to E1
 - Filter Actual Grad Date (Column J) to exclude (Blank) and dates in excess of 8/1/2019.
 - Add still enrolled to graduated students.

As Sex, Race, Enrollment Status, Grade Level, and Original Start are important fields for this report, ensure that none of your students within the report have a blank entry for these fields.

Finance

This report looks at payments between 7/1/2018 and 6/30/2019.

It is important that you make sure all ledger transactions are accurate. This includes, but is not limited to, having correct: Post Date, Amount, Type, Program, and categorizing them into the correct Code (e.g. tuition, books, etc.) so that this report pulls accurate results.

The Finance Grid List is provided to assist in detailing which students make up the numbers in OnlineSMART. To confirm these numbers, perform the following tasks:

- 1) Export the Finance Grid List to Excel, keeping the Cohort Start Date of 7/1/2018 and Cohort End Date of 6/30/2019.
- 2) Click into Cell A1 and within the **Home** tab, go to **Sort & Filter** and click the **Filter** icon
- 3) Before verifying each listed task, make sure to clear the filters to ensure you have a clean starting point. This is done in Excel under Home > Sort & Filter > Clear

Part C

- For Line No. 01 Pell grants (federal)
 - Filter Pell (Column I) to only include 'Y'
- For Line No. 02 Other federal grants (Do NOT include FDSL amounts)
 - Filter Fed Grants (Column J) to only include 'Y'
- For Line No. 03a State grants
 - Filter State Grants (Column K) to only include 'Y'
- For Line No. 03b Local grants (government)
 - Filter Local Grants (Column L) to only include 'Y'
- For Line No. 04 Institutional grants
 - Filter Inst Grants (Column M) to only include 'Y'
- For Line No. 05 **Total student grants**
 - Add up the figures from Line No. 01 to Line No. 04
- For Line No. 06 Allowances applied to tuition and fees
 - Filter Discounts/Allowances (Column N) to only include 'Y'

Part D

- For Line No. 01 Tuition and fees (net of amount reported in Part C, line 06)
 - Filter Revenues by Source (Column O) to only include 'Y'
- Line No. 09 **Total revenues and investment return** will show the same as Line No. 01 in SMART.