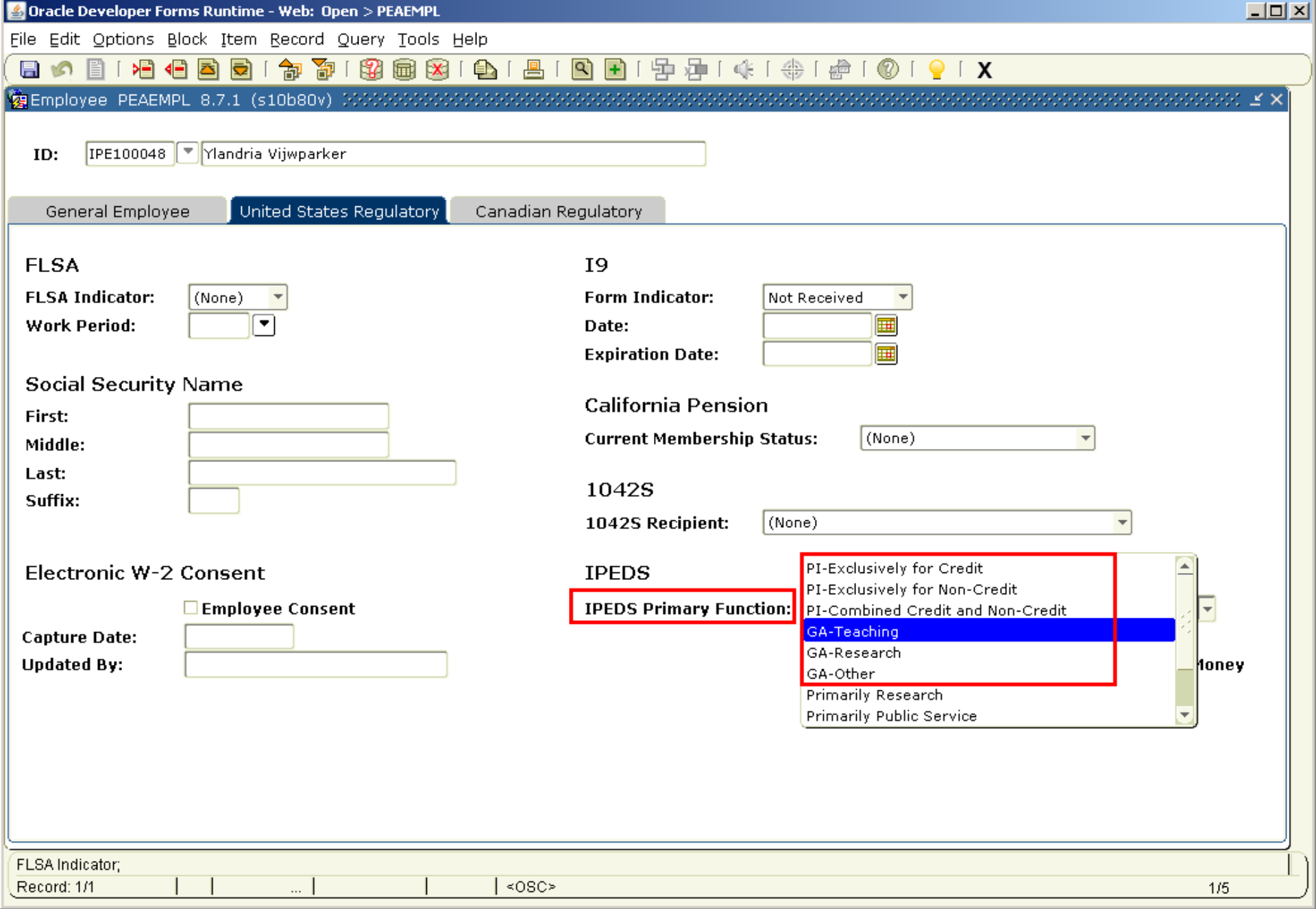
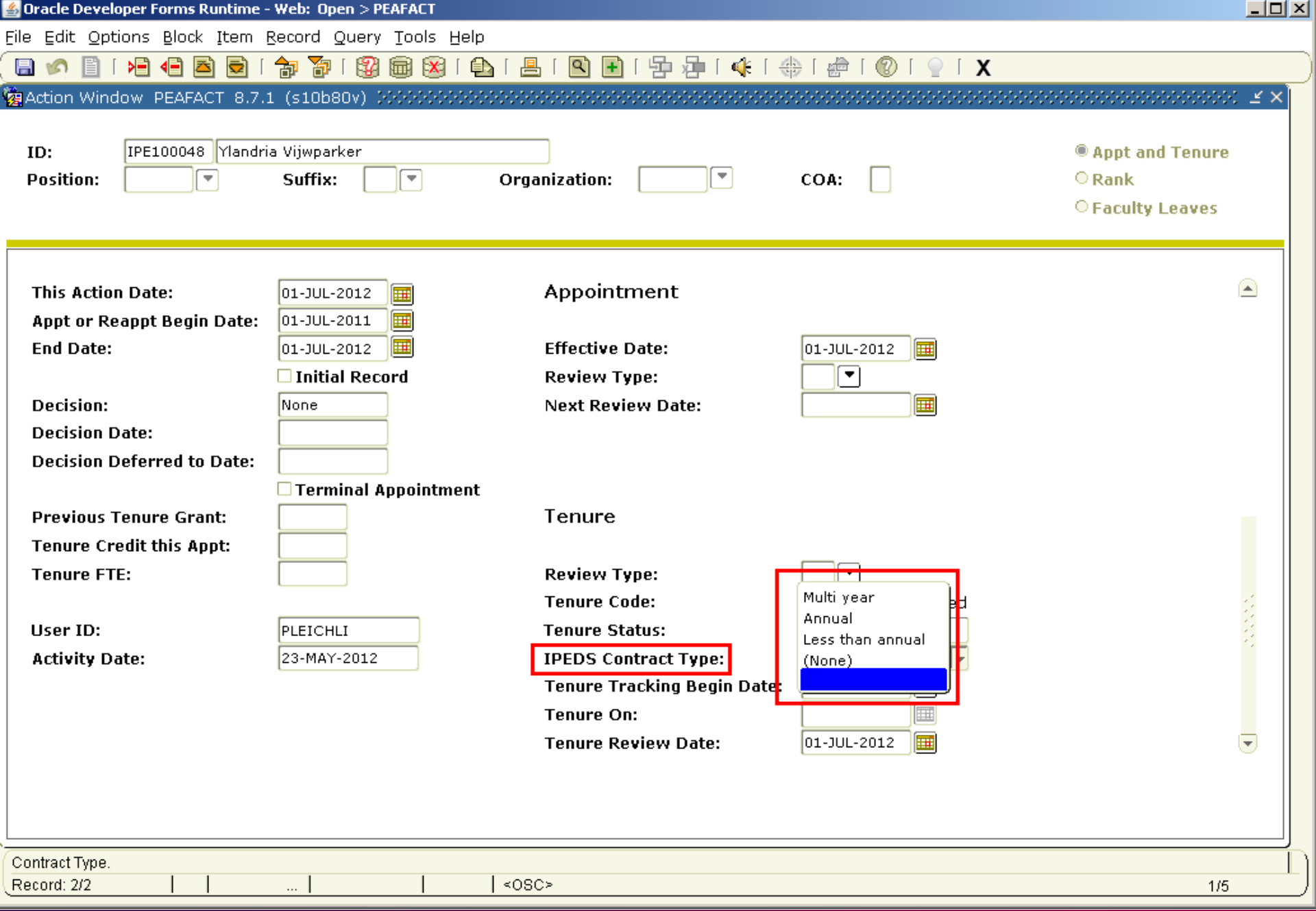
ellucian

# Banner HR 8.7.1 IPEDS 2012-2013 Winter Data Collection Changes

# Why are we making these changes…

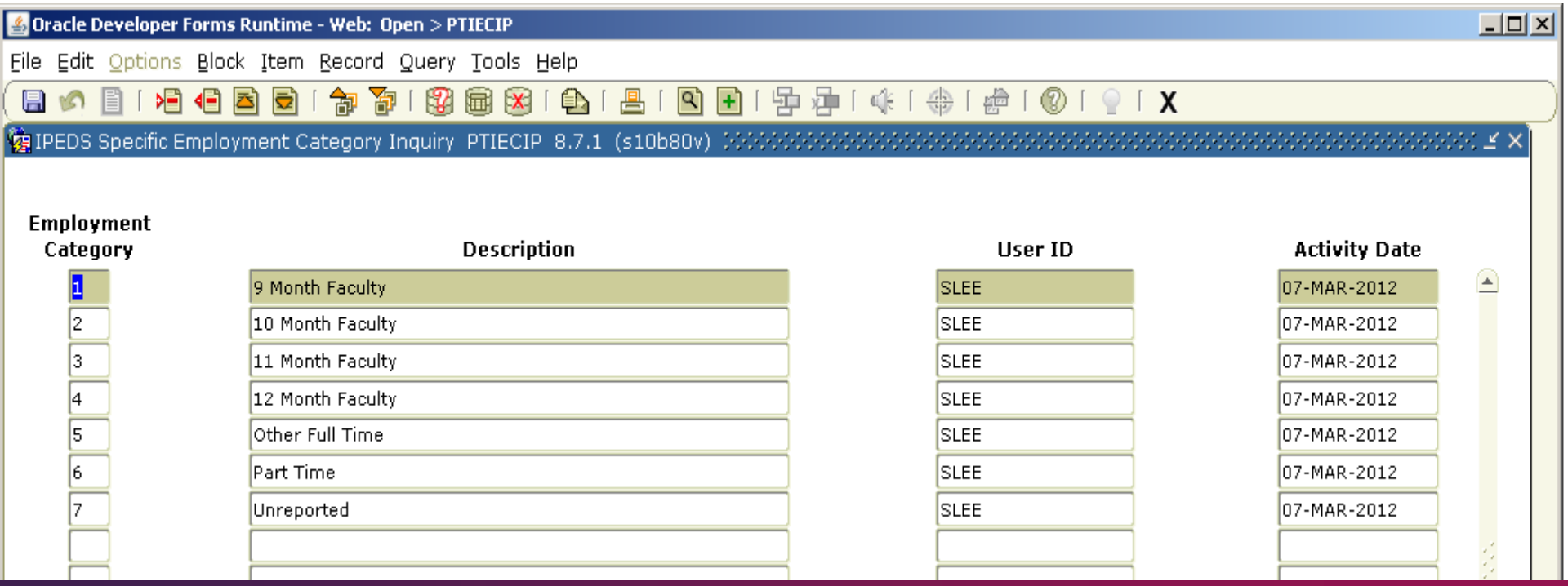
- NCES has mandated new reporting requirements for
  - Primary function for
    - Graduate Students
    - Full Time Faculty whose primary function is Instruction
  - Contract type for Non-Tenure track Faculty
  - Occupational Categories
  - Employment Categories


Oracle Developer Forms Runtime - Web: Open > PEAEMPL
File Edit Options Block Item Record Query Tools Help
Employee PEAEMPL 8.7.1 (s10b80v)
ID: IPE100048 Ylandria Vijwparker
General Employee
United States Regulatory
Canadian Regulatory
FLSA
FLSA Indicator: (None)
Work Period:
Social Security Name
First:
Middle:
Last:
Suffix:
Electronic W-2 Consent
Employee Consent
Capture Date:
Updated By:
I9
Form Indicator: Not Received
Date:
Expiration Date:
California Pension
Current Membership Status: (None)
1042S
1042S Recipient: (None)
IPEDS
IPEDS Primary Function:
PI-Exclusively for Credit
PI-Exclusively for Non-Credit
PI-Combined Credit and Non-Credit
GA-Teaching
GA-Research
GA-Other
Primarily Research
Primarily Public Service
Money
FLSA Indicator;
Record: 1/1
<OSC>
1/5


Oracle Developer Forms Runtime - Web: Open > PEAFACT
File Edit Options Block Item Record Query Tools Help
Action Window PEAFACT 8.7.1 (s10b80v)
ID: IPE100048 Ylandria Vijwparker
Position: Suffix: Organization: COA:
Appt and Tenure
Rank
Faculty Leaves
This Action Date: 01-JUL-2012
Appt or Reappt Begin Date: 01-JUL-2011
End Date: 01-JUL-2012
Initial Record
Decision: None
Decision Date:
Decision Deferred to Date:
Terminal Appointment
Previous Tenure Grant:
Tenure Credit this Appt:
Tenure FTE:
User ID: PLEICHLI
Activity Date: 23-MAY-2012
Appointment
Effective Date: 01-JUL-2012
Review Type:
Next Review Date:
Tenure
Review Type:
Tenure Code:
Tenure Status:
IPEDS Contract Type:
Tenure Tracking Begin Date:
Tenure On:
Tenure Review Date: 01-JUL-2012
Multi year
Annual
Less than annual
(None)
Contract Type.
Record: 2/2
<OSC>
1/5

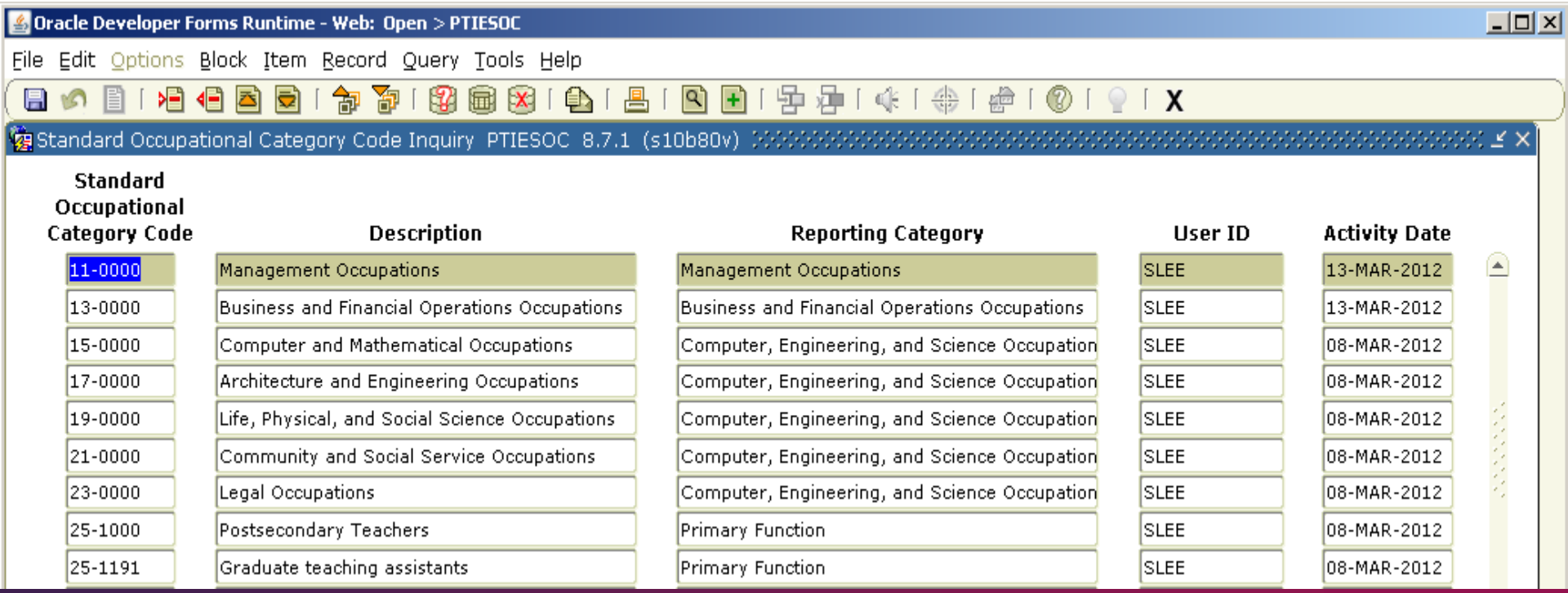
# PTIECIP – New Form

- New Table, PTVECIP
- Supplied as Seed Data
- Inquiry only form, PTIECIP

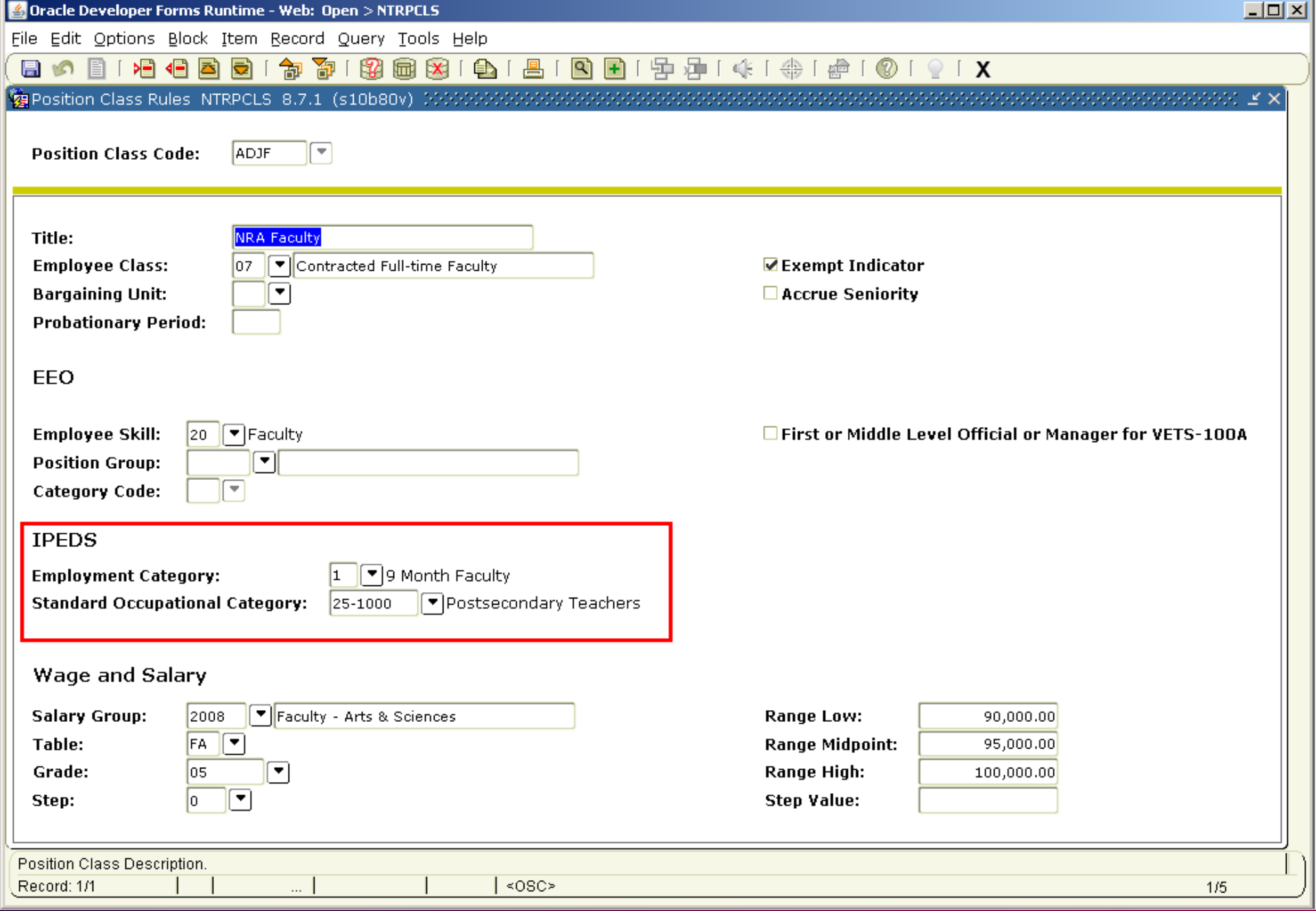


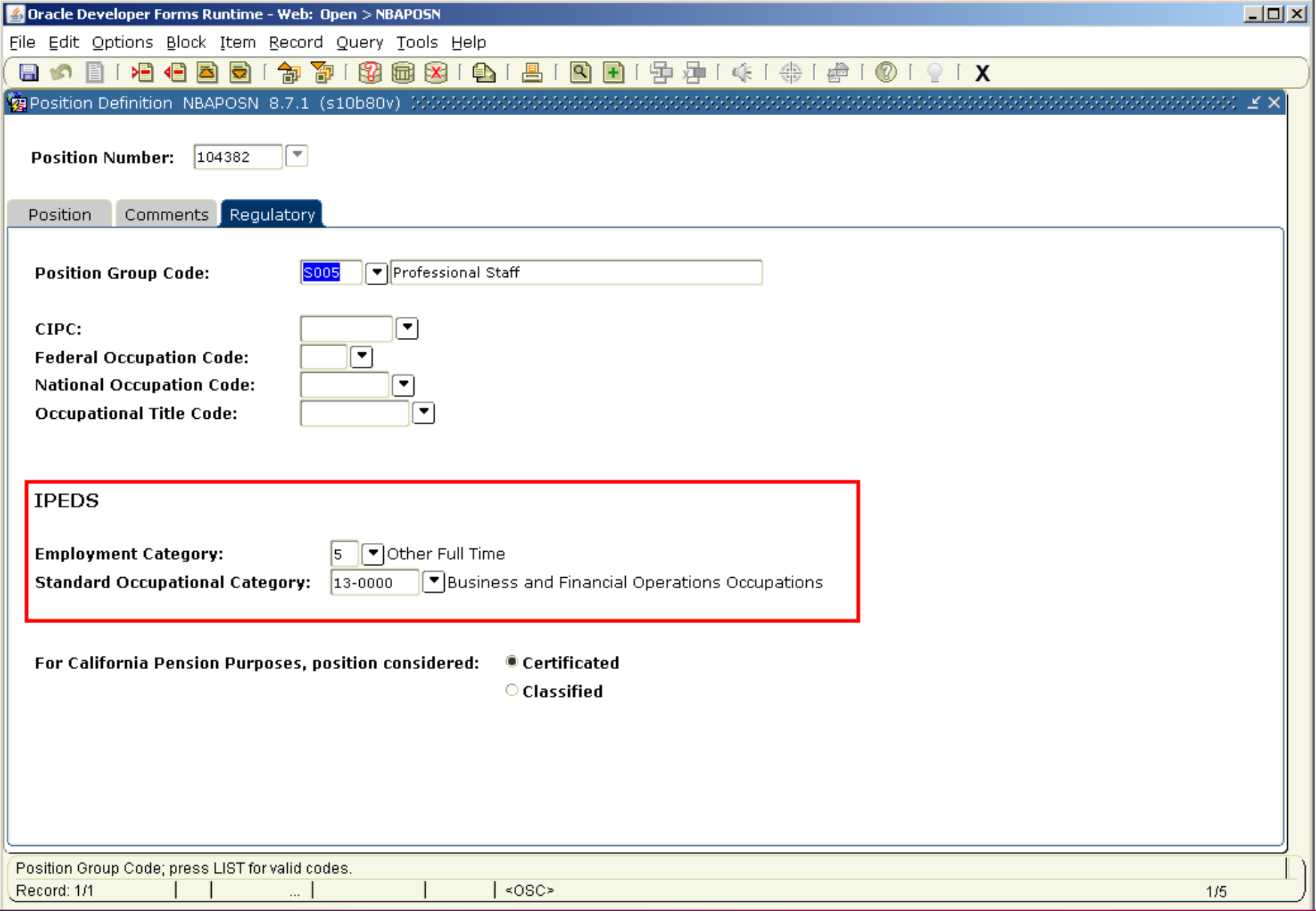
# PTIESOC – New Form

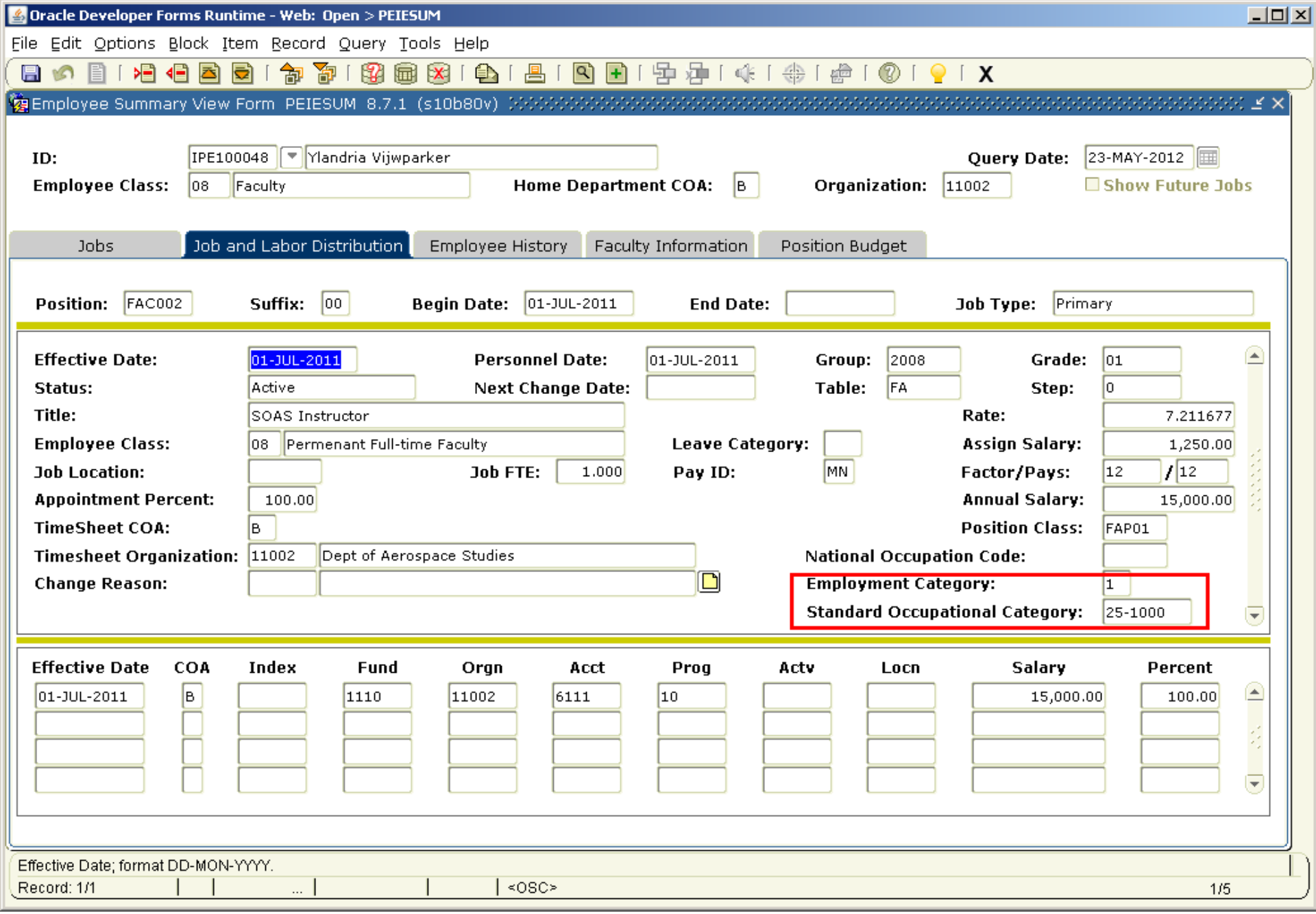
- New Table, PTRECIP
- Supplied as Seed Data
- Inquiry only form, PTIESOC




| Standard Occupational Category Code | Description | Reporting Category | User ID | Activity Date |
|---|---|---|---|---|
| 11-0000 | Management Occupations | Management Occupations | SLEE | 13-MAR-2012 |
| 13-0000 | Business and Financial Operations Occupations | Business and Financial Operations Occupations | SLEE | 13-MAR-2012 |
| 15-0000 | Computer and Mathematical Occupations | Computer, Engineering, and Science Occupation | SLEE | 08-MAR-2012 |
| 17-0000 | Architecture and Engineering Occupations | Computer, Engineering, and Science Occupation | SLEE | 08-MAR-2012 |
| 19-0000 | Life, Physical, and Social Science Occupations | Computer, Engineering, and Science Occupation | SLEE | 08-MAR-2012 |
| 21-0000 | Community and Social Service Occupations | Computer, Engineering, and Science Occupation | SLEE | 08-MAR-2012 |
| 23-0000 | Legal Occupations | Computer, Engineering, and Science Occupation | SLEE | 08-MAR-2012 |
| 25-1000 | Postsecondary Teachers | Primary Function | SLEE | 08-MAR-2012 |
| 25-1191 | Graduate teaching assistants | Primary Function | SLEE | 08-MAR-2012 |


Oracle Developer Forms Runtime - Web: Open > NTRPCLS
File Edit Options Block Item Record Query Tools Help
Position Class Rules NTRPCLS 8.7.1 (s10b80v)
Position Class Code: ADJF
Title: NRA Faculty
Employee Class: 07 Contracted Full-time Faculty
Bargaining Unit:
Probationary Period:
Exempt Indicator
Accrue Seniority
EEO
Employee Skill: 20 Faculty
Position Group:
Category Code:
First or Middle Level Official or Manager for VETS-100A
IPEDS
Employment Category: 1 9 Month Faculty
Standard Occupational Category: 25-1000 Postsecondary Teachers
Wage and Salary
Salary Group: 2008 Faculty - Arts & Sciences
Table: FA
Grade: 05
Step: 0
Range Low: 90,000.00
Range Midpoint: 95,000.00
Range High: 100,000.00
Step Value:
Position Class Description.
Record: 1/1
<OSC>
1/5


Oracle Developer Forms Runtime - Web: Open > NBAPOSN
File Edit Options Block Item Record Query Tools Help
Position Definition NBAPOSN 8.7.1 (s10b80v)
Position Number: 104382
Position
Comments
Regulatory
Position Group Code: S005 Professional Staff
CIPC:
Federal Occupation Code:
National Occupation Code:
Occupational Title Code:
IPEDS
Employment Category: 5 Other Full Time
Standard Occupational Category: 13-0000 Business and Financial Operations Occupations
For California Pension Purposes, position considered:
Certificated
Classified
Position Group Code; press LIST for valid codes.
Record: 1/1
<OSC>
1/5

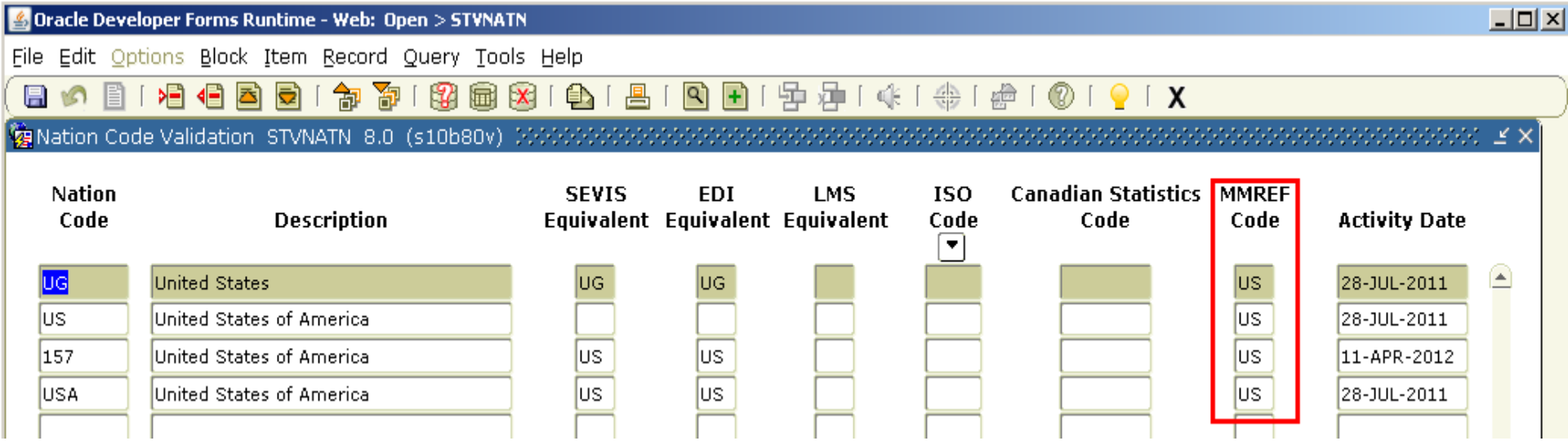

Oracle Developer Forms Runtime - Web: Open > PEIESUM
File Edit Options Block Item Record Query Tools Help
Employee Summary View Form PEIESUM 8.7.1 (s10b80v)
ID: IPE100048 Ylandria Vijwparker
Query Date: 23-MAY-2012
Employee Class: 08 Faculty
Home Department COA: B
Organization: 11002
Show Future Jobs
Jobs
Job and Labor Distribution
Employee History
Faculty Information
Position Budget
Position: FAC002
Suffix: 00
Begin Date: 01-JUL-2011
End Date:
Job Type: Primary
Effective Date: 01-JUL-2011
Personnel Date: 01-JUL-2011
Group: 2008
Grade: 01
Status: Active
Next Change Date:
Table: FA
Step: 0
Title: SOAS Instructor
Rate: 7.211677
Employee Class: 08 Permenant Full-time Faculty
Leave Category:
Assign Salary: 1,250.00
Job Location:
Job FTE: 1.000
Pay ID: MN
Factor/Pays: 12 / 12
Appointment Percent: 100.00
Annual Salary: 15,000.00
TimeSheet COA: B
Position Class: FAP01
Timesheet Organization: 11002 Dept of Aerospace Studies
National Occupation Code:
Change Reason:
Employment Category: 1
Standard Occupational Category: 25-1000
Effective Date COA Index Fund Orgn Acct Prog Actv Locn Salary Percent
01-JUL-2011 B 1110 11002 6111 10 15,000.00 100.00
Effective Date; format DD-MON-YYYY.
Record: 1/1
<OSC>
1/5

# NBAJOBS

- Form level edits are changed for the IPEDS Reportable indicator, to replace the existing edits with edits that use the Employment Category and Standard Occupational Category
  - No form, or table changes are required.
  - The Jobs API and BPI have changed for the IPEDS reportable indicator edits.

# IPEDS 2012-2013 Winter Data Collection

- Edits, edits, edits!
  - US based institutions ONLY, using the Nation Code on GUAINST - *IMPORTANT*




| Nation Code | Description | SEVIS Equivalent | EDI Equivalent | LMS Equivalent | ISO Code | Canadian Statistics Code | MMREF Code | Activity Date |
|---|---|---|---|---|---|---|---|---|
| UG | United States | UG | UG | | | | US | 28-JUL-2011 |
| US | United States of America | | | | | | US | 28-JUL-2011 |
| 157 | United States of America | US | US | | | | US | 11-APR-2012 |
| USA | United States of America | US | US | | | | US | 28-JUL-2011 |

# IPEDS 2012-2013 Winter Data Collection

- Consolidate current edit routines
- Provide edits between the new fields, as we do for the current fields
  - Employee API and form
  - Jobs, Positions, Position Class, Electronic Approvals
    - IPEDS reportable indicator
    - SOC code
    - Eclass
    - Pclass
    - IPEDS specific Employee Category
    - Primary function

# Data Conversion

| Script Name | Purpose |
|---|---|
| ntrpcls-list.sql | Identify position class records to update Employment Category and Standard Occupational Category |
| ntrpcls-load.sql | Update position class records |
| nbbposn-load.sql | Update position records with Employment Category and Standard Occupational Category from the Position Class |
| pebempl-pf-list.sql | Identify full time faculty with primary function of “Primarily Instruction” |
| pebempl-grad-list.sql | Identify graduate assistants – employees with a current employee skill code of “8x” |
| pebempl-pf-load.sql | Update employee record with primary function |
| perappt-list.sql | Identify faculty tenure records where the tenure code is “N” or “I” |
| perappt-load.sql | Update faculty tenure records |

# Data Conversion

| EEOG | ECLS | ESKL | PCLS | DESCRIPTION | CDATE | ECIP | ESOC |
|---|---|---|---|---|---|---|---|
| 3 | 1 | 10 | AFP01 | Senior Administrators | 1-Jul-09 | | |
| 3 | 1 | 10 | AFP02 | Administrators | 1-Jul-02 | | |
| 3 | 2 | 10 | AFP03 | Directors | 23-Jun-07 | | |
| 3 | AH | 10 | AM001 | Administrator | 28-May-09 | | |
| 4 | 11 | 10 | APP02 | Administrative | 1-Jul-02 | | |
| 3 | AH | 10 | ARTES | Faculty | 1-Jan-09 | | |
| 3 | 3 | 50 | CFP01 | Clerk I | 14-Dec-95 | | |
| 3 | 3 | 50 | CFP02 | Clerk II | 14-Dec-95 | | |
| 3 | 3 | 50 | CFP03 | Clerk III | 14-Dec-95 | | |
| 3 | 3 | 50 | CFP04 | Secretary I | 1-Jul-02 | | |
| 3 | 3 | 50 | CFP05 | Secretary II | 14-Dec-95 | | |
| 3 | 3 | 50 | CFP06 | Secretary III | 14-Dec-95 | | |
| 3 | 3 | 50 | CFP07 | Word Processing | 14-Dec-95 | | |
| 3 | 3 | 50 | CFP08 | Faculty Secretary I | 14-Dec-95 | | |
| 3 | 3 | 50 | CFP09 | Faculty Secretary II | 14-Dec-95 | | |
| 3 | 3 | 40 | CFP10 | Administrative Assistants | 14-Dec-95 | | |

# Data Conversion

Relationship Between Standard Occupational Category and Employment Category

| Standard Occupational Category | Description | Valid Employment Category |
|---|---|---|
| 11-0000 | Management Occupations | 5, 6 |
| 13-0000 | Business and Financial Operations Occupations | 5, 6 |
| 15-0000 | Computer and Mathematical Occupations | 5, 6 |
| 17-0000 | Architecture and Engineering Occupations | 5, 6 |
| 19-0000 | Life, Physical, and Social Science Occupations | 5, 6 |
| 21-0000 | Community and Social Service Occupations | 5, 6 |
| 23-0000 | Legal Occupations | 5, 6 |
| 27-0000 | Arts, Design, Entertainment, Sports, and Media Occupations | 5, 6 |
| 25-1000 | Postsecondary Teachers | 1, 2, 3, 4, 5, 6 |

# Release Minimum Requirements

- Position Control, 8.5
- HR, 8.5
- General, 8.3

# Release Support

- Position Control, Release 8.5
  - WITH patch p1-fjz1gt_pos8050005
    - Install patch p1-156B2BZ_pos8070101
  - WITHOUT patch p1-fjz1gt_pos8050005
    - Install patch p1-15A70BT_pos8070102
- Position Control, Release 8.6
  - Install patch p1-15ckjfv_pos8070103
- Position Control, Release 8.7
  - No patches required
- HR, Release 8.5, 8.6, 8.7
  - No patches required

# Delivery

- 8.7.1, Data collection – June 30 (or sooner)
  - Release Notes and resolutions
  - OLH
  - Technical Reference Manual
  - Handbook (*NEW!)

# Where can you get more information?

- Phase 1
  - Refer to the Quick Summary in the Commons, posted the week of March 5 and updated in early June
- Phase 2
  - Watch the Commons for more information!
- NCES websites
  - IPEDS Data Provider:
    - https://surveys.nces.ed.gov/ipeds/
  - Summary of Changes:
    - https://surveys.nces.ed.gov/ipeds/ViewContent.aspx?contentId=22
  - Screens and Instructions (be sure to look at the 2012-2013 changes):
    - https://surveys.nces.ed.gov/ipeds/visresults.aspx

# Summary

- Why the changes are required
- What the changes from NCES are, and how the system is affected
- Data Conversion
- Release Minimums and details
- Release delivery
- Additional information and resources

# Questions and Answers

Thank You!

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