2017 Higher Education Summit/SUS Data Workshop

Thursday, June 8, 2017

Session: IRM Data Workshop
Facilitator: Gene Kovacs
# Table of Contents

Reports from Breakout Sessions from Session Facilitators: .................................................. 4
IPEDS - 2017-2018 Due Dates .................................................................................................... 5
IPEDS - 2015-2016 Summary of Changes .............................................................................. 7
General – SUDS Due Dates ..................................................................................................... 11
General – Non-Resident Alien Flag .......................................................................................... 12
General – Profile Assessment Flag .......................................................................................... 13
General – UF Online and Innovation Academy Edit ................................................................. 14
General – UF Online and Innovation Academy ..................................................................... 15
General – Internal Native Transfers ........................................................................................ 16
General – Resubmission Comparison Report .......................................................................... 17
Admissions – GPA High School ............................................................................................... 18
Admissions – Final Admission Action (Edit 5358) .................................................................. 19
Admissions – Final Admission Action (Edit 5802) .................................................................. 20
College Prep Completions – Scholastic Assessment Test (SAT) ............................................. 21
Hours to Degree – Credit Hour Testing Method ..................................................................... 22
Hours to Degree – Accountability Report HTD Exempt Summary ......................................... 23
Hours to Degree – Excess Hours Degree Report by Student Detail ........................................ 24
Degrees Awarded – Degree – Level Granted .......................................................................... 25
Student Financial Aid – Financial Aid Award Identifier [REVISED 2017-08-17] .................. 26
Student Instruction – Fee Waiver Kind/3rd Pary Kind ............................................................. 27
Student Instruction – Waiver Indicator/3rd Party Indicator ...................................................... 28
Student Instruction – Waiver/Exemption Type ....................................................................... 29
Student Instruction – Room Number Digits (Edit 5336) .......................................................... 30
Student Instruction – Room Number Digits (Edit 5367) .......................................................... 31
**Appendix 1. Waiver/Exemption Type (element #01109)** ....................................................... 32
Welcome: Gene Kovacs

Reports from Breakout Sessions from Session Facilitators:
    Admissions and Registrars
    Facilities
    Institutional Research
    Board Portal Overview

Legislative Update: Brian Logan
IPEDS - 2017-2018 Due Dates

Description:
Topic ID: 10-10
Initiator: IPEDS
Affects: N/A

https://surveys.nces.ed.gov/ipeds/

<table>
<thead>
<tr>
<th>2016-17</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 9</td>
<td>September 6</td>
<td>December 13</td>
<td>December 13</td>
</tr>
<tr>
<td>Collection Closes for Keyholders</td>
<td>October 18</td>
<td>February 14</td>
<td>April 11</td>
<td></td>
</tr>
<tr>
<td>Collection Closes for Coordinators</td>
<td>November 1</td>
<td>February 28</td>
<td>April 25</td>
<td></td>
</tr>
<tr>
<td>Components included</td>
<td>Registration; Report Mapping; Institution ID; IC-Header</td>
<td>Institutional Characteristics; Completions; 12-month Enrollment</td>
<td>Student Financial Aid; Graduation Rates; 200% Graduation Rates; Admissions; Outcome Measures</td>
<td>Fall Enrollment; Finance; Human Resources; Academic Libraries</td>
</tr>
<tr>
<td>Preliminary Data available in the IPEDS Data Center*</td>
<td>Early summer</td>
<td>Early fall</td>
<td>Mid-Fall</td>
<td></td>
</tr>
</tbody>
</table>

* Release dates are approximate.

All institutions will be required to register for the 2017-18 data collection cycle.
UserIDs and passwords for 2017-18 will be distributed to all institutions on August 9. Those with designated keyholders will receive information via email. All institutions for which there is no designated keyholder will receive a letter directed to the CEO containing registration information.
Institutions are encouraged but not required to complete Report Mapping, Institution Identification, and IC Header during the Registration period.
Report Mapping (if applicable) and Institution Identification must be completed, and IC Header must be locked before the Fall surveys can be started. Report Mapping and IC Header are available until the end of the Fall collection.
Institution Identification is available through Spring.
On August 30, NCES will review the registration status of each institution. If an institution has not registered as of this date, a letter will be sent to the CEO requesting appointment of a new keyholder.

**Deadline Extensions:** There are no deadline extensions available for the IPEDS survey components.
Note concerning Prior Year Revision System: Survey components will be open for revision during their regular data collection period, except that Fall components will open on 9/13 instead of 9/6. For example, revisions to the Completions component can be made during the Fall data collection period.

Compliance Notice: Mandatory Reporting Requirements for Institutions with Program Participation Agreements

Section 490 of the Higher Education Amendments of 1992 (P.L. 102-325) requires that "institutions will complete surveys conducted as part of the Integrated Postsecondary Education Data System (IPEDS)...in a timely manner and to the satisfaction of the Secretary". Thus, reporting to IPEDS is mandatory for institutions that participate in or are applicants for participation in any Federal financial assistance program authorized by Title IV of the Higher Education Act of 1965, as amended (20 USC 1094, Section 487(a)(17)).
IPEDS - 2015-2016 Summary of Changes

Description:
Topic ID:        10-15
Initiator:  IPEDS
Affects:        Multiple


Outcome Measures

Changes to the IPEDS Outcome measures component, 2017-18

1. Academic reporters will report on a full-year, entering cohort:
   Similar to program reporters, all reporting institutions to the OM survey will be given the same
   instructions when creating their OM cohort:
   Institutions will report using a full-year cohort. Institutions will report during the period between
   July 1, 2009 and June 30, 2010.
   Students will be assigned to a cohort upon entry and will remain in the assigned cohort.

2. Four Pell Grant sub-cohorts will be reported for each of the four OM cohorts (FTFT, PTFT, FTNFT,
   and PTNFT).

   Students who received a Pell Grant (dollars disbursed) are included in the Pell Grant sub-cohorts.
   Institutions should not include students who were awarded a Pell Grant, but did not receive a
   disbursement.

   Institutions will identify and include Pell Grant recipients who received a Pell Grant during the
   cohort coverage period of July 1, 2009 and June 30, 2010. Students who did not receive a Pell Grant
   during the cohort coverage period, but received a Pell Grant after June 30, 2010 are not included in
   the Pell Grant sub-cohorts.

3. A new 4-year after entry award status column will be added.
   Institutions will report the award statuses at 4-, 6- and 8-years. There is no change to enrollment
   status reporting requirements at 8 years after entry.

4. At the 4-, 6-, and 8-year award statuses, institutions will report the highest award earned (i.e.,
   certificates/equivalent, associate’s or bachelor’s).

   For each of the OM cohorts, a sub-cohort of non-Pell Grant recipients will be calculated by
   subtracting the Pell Grant recipient sub-cohort from the total of the same OM cohort.
Collect the status update from both 2- and 4-year institutions at 8 years after the cohort enters the institution with award information collected for both the 6- and 8-year timeframes. Pell Grant recipient data collection will begin in 2017-18. Institutions will report on their 2009-10 cohorts.

**Note:** Data will not be disaggregated by race, ethnicity, or gender.
**Note:** No outcome data will be collected from non-degree-granting institutions.

## Admissions

Change to IPEDS Admissions component, 2017-18

1. Instruction change for reporting SAT Critical Reading and Critical Math scores:
   In the 2016-17 forms, SAT critical reading and math scores were reported based on the (2015) SAT score range. In 2017-18, SAT critical reading and math scores should be reported based on the new (2016) SAT score range. Institutions that have scores based on the (2015) SAT score range should convert scores using the College Board concordance tables.

   New instruction
   SAT critical reading and math scores should now be reported based on the 2016 SAT score range. Institutions that have scores based on the old (2015) SAT score range should convert scores using the College Board concordance tables.
Changes to IPEDS Institutional Characteristics component, 2017-18

**Part C Student Services – Distance Opportunities**

1. Combining two previous distance education questions on courses and programs

<table>
<thead>
<tr>
<th>Distance education courses</th>
<th>Distance education programs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Undergraduate level</td>
<td></td>
</tr>
<tr>
<td>Graduate level</td>
<td></td>
</tr>
<tr>
<td>The institution does not offer distance education at the undergraduate or graduate level.</td>
<td></td>
</tr>
</tbody>
</table>

2. Are ALL of the programs at your institution offered exclusively via distance education programs?

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>No</td>
<td></td>
</tr>
</tbody>
</table>

**Distance education opportunities**

Distance education is one that uses one or more technologies to deliver instruction to students who are separated from the instructor and to support regular and substantive interaction between the students and the instructor synchronously or asynchronously. Requirements for coming to campus for orientation, testing, or academic support services do not exclude a course from being classified as distance education. Technologies used for instruction may include the following: Internet; one-way and two-way transmissions through open broadcasts, closed circuit, cable, microwave, broadband lines, fiber optics, satellite or wireless communication devices; audio conferencing; and video cassette, DVDs, and CD-ROMs, if the cassette, DVDs, and CD-ROMs are used in a course in conjunction with the technologies listed above.

**Distance education by levels**

Indicate whether your institution offers distance education opportunities (courses and/or programs) at the undergraduate level and/or graduate level. If you offer distance education at both levels, please check both boxes. If you do not offer distance education opportunities, please select the last option. A distance education course is a course in which the instructional content is delivered exclusively via distance education. A distance education program is a program for which all the required coursework for program completion is able to be completed via distance education courses.
Exclusively distance education programs
Indicate whether or not ALL programs offered by your institution are delivered exclusively via distance education, meaning all the required coursework for program completion is able to be completed via distance education courses.
General – SUDS Due Dates

Description: Due Dates for 2017-2018 Standard Files
Topic ID: 50-10
Initiator: Board-IRM
Affects: N/A

NOTE: Software for each submission will be released 4 weeks prior to the file’s due date or earlier

### Master File Due Dates - DRAFT
2017-2018

<table>
<thead>
<tr>
<th>ABBREV</th>
<th>TITLE</th>
<th>TERM</th>
<th>REPT TIME</th>
<th>DUE DATE</th>
<th>STATUS</th>
</tr>
</thead>
<tbody>
<tr>
<td>LAPI</td>
<td>Limited Access Programs File</td>
<td>Annual 2016</td>
<td>2016-2017</td>
<td>Jul-24-17 Mon</td>
<td>REQUIRED</td>
</tr>
<tr>
<td>OB</td>
<td>Operating Budget File</td>
<td>Annual 2017</td>
<td>2017-2018</td>
<td>Aug-21-17 Mon</td>
<td>REQUIRED</td>
</tr>
<tr>
<td>SCD</td>
<td>Salary Category Detail File</td>
<td>OB 2017</td>
<td>2017-08</td>
<td>Aug-21-17 Mon</td>
<td>REQUIRED</td>
</tr>
<tr>
<td>ADM</td>
<td>Admissions File</td>
<td>Summer 2017</td>
<td>2017-05</td>
<td>Sep-06-17 Fri</td>
<td>REQUIRED</td>
</tr>
<tr>
<td>SPA</td>
<td>Physical Facilities Space File</td>
<td>Summer 2017</td>
<td>2017-05</td>
<td>Sep-08-17 Fri</td>
<td>REQUIRED</td>
</tr>
<tr>
<td>SIF</td>
<td>Student Instruction File</td>
<td>Summer 2017</td>
<td>2017-05</td>
<td>Sep-22-17 Fri</td>
<td>REQUIRED</td>
</tr>
<tr>
<td>TEL</td>
<td>Teacher Education Information</td>
<td>Annual 2016</td>
<td>2016-2017</td>
<td>Sep-25-17 Mon</td>
<td>REQUIRED</td>
</tr>
<tr>
<td>ADM</td>
<td>Admissions File</td>
<td>Fall 2017</td>
<td>2017-08</td>
<td>Oct-06-17 Fri</td>
<td>REQUIRED</td>
</tr>
<tr>
<td>SIFD</td>
<td>Degrees Awarded</td>
<td>Summer 2017</td>
<td>2017-05</td>
<td>Sep-29-17 Fri</td>
<td>REQUIRED</td>
</tr>
<tr>
<td>CPC</td>
<td>College Prep Completion</td>
<td>Summer 2017</td>
<td>2017-05</td>
<td>Oct-05-17 Thu</td>
<td>REQUIRED</td>
</tr>
<tr>
<td>SIFP</td>
<td>Student Instruction File Preliminary</td>
<td>Fall 2017</td>
<td>2017-08</td>
<td>Oct-13-17 Fri</td>
<td>REQUIRED</td>
</tr>
<tr>
<td>IRD</td>
<td>Instruction &amp; Research File</td>
<td>Annual 2016</td>
<td>2016-2017</td>
<td>Oct-23-17 Mon</td>
<td>REQUIRED</td>
</tr>
<tr>
<td>FA</td>
<td>Expenditure Analysis File</td>
<td>Annual 2016</td>
<td>2016-2017</td>
<td>Oct-30-17 Mon</td>
<td>REQUIRED</td>
</tr>
<tr>
<td>HTD</td>
<td>Hours to Degree File</td>
<td>Annual 2016</td>
<td>2016-2017</td>
<td>Nov-08-17 Wed</td>
<td>REQUIRED</td>
</tr>
<tr>
<td>EMPL</td>
<td>University Employee/OPS File</td>
<td>Fall 2017</td>
<td>2017-10</td>
<td>Nov-08-17 Thu</td>
<td>REQUIRED</td>
</tr>
<tr>
<td>SPA</td>
<td>Physical Facilities Space File</td>
<td>Fall 2017</td>
<td>2017-08</td>
<td>Jan-09-18 Tue</td>
<td>REQUIRED</td>
</tr>
<tr>
<td>SCD</td>
<td>Salary Category Detail File</td>
<td>MidYr 2018</td>
<td>2018-01</td>
<td>Jan-08-18 Mon</td>
<td>REQUIRED</td>
</tr>
<tr>
<td>CPC</td>
<td>College Prep Completion</td>
<td>Fall 2017</td>
<td>2017-08</td>
<td>Feb-01-18 Thu</td>
<td>REQUIRED</td>
</tr>
<tr>
<td>SIF</td>
<td>Student Instruction File</td>
<td>Fall 2017</td>
<td>2017-08</td>
<td>Jan-19-18 Fri</td>
<td>REQUIRED</td>
</tr>
<tr>
<td>RET</td>
<td>Retention File</td>
<td>Annual 2016</td>
<td>2016-2017</td>
<td>Jan-29-18 Tue</td>
<td>REQUIRED</td>
</tr>
<tr>
<td>SIF</td>
<td>Student Instruction File</td>
<td>Fall 2017</td>
<td>2017-08</td>
<td>Jan-26-18 Fri</td>
<td>REQUIRED</td>
</tr>
<tr>
<td>SIFD</td>
<td>Degrees Awarded</td>
<td>Fall 2017</td>
<td>2017-08</td>
<td>Feb-02-18 Fri</td>
<td>REQUIRED</td>
</tr>
<tr>
<td>ADM</td>
<td>Admissions File</td>
<td>Spring 2018</td>
<td>2018-01</td>
<td>Mar-02-18 Fri</td>
<td>REQUIRED</td>
</tr>
<tr>
<td>EMPL</td>
<td>University Employee/OPS File</td>
<td>Spring 2018</td>
<td>2018-03</td>
<td>Apr-09-18 Mon</td>
<td>REQUIRED</td>
</tr>
<tr>
<td>SPA</td>
<td>Physical Facilities Space File</td>
<td>Spring 2018</td>
<td>2018-01</td>
<td>May-25-18 Fri</td>
<td>REQUIRED</td>
</tr>
<tr>
<td>SIF</td>
<td>Student Instruction File</td>
<td>Spring 2018</td>
<td>2018-01</td>
<td>Jun-08-18 Fri</td>
<td>REQUIRED</td>
</tr>
<tr>
<td>CPC</td>
<td>College Prep Completion</td>
<td>Spring 2018</td>
<td>2018-01</td>
<td>Jun-08-18 Fri</td>
<td>REQUIRED</td>
</tr>
<tr>
<td>SIF</td>
<td>Student Instruction File</td>
<td>Spring 2018</td>
<td>2018-01</td>
<td>Jun-21-18 Thu</td>
<td>REQUIRED</td>
</tr>
<tr>
<td>SIFD</td>
<td>Degrees Awarded</td>
<td>Spring 2018</td>
<td>2018-01</td>
<td>Jun-21-18 Thu</td>
<td>REQUIRED</td>
</tr>
<tr>
<td>SCD</td>
<td>Salary Category Detail File</td>
<td>EEOY 2018</td>
<td>2018-06</td>
<td>Jun-21-18 Thu</td>
<td>REQUIRED</td>
</tr>
<tr>
<td>SIFD</td>
<td>Degrees Awarded</td>
<td>Spring 2018</td>
<td>2018-01</td>
<td>Jul-05-18 Thu</td>
<td>REQUIRED</td>
</tr>
</tbody>
</table>
General - Non-Resident Alien Flag

Description: Modify Edit
Topic ID: 100-10
Initiator: Board-IRM
Affects: ADM, CPC, HTD, IRD, SFA, SIF, SIFP, SIFD, TEI, EMPL, SCD

We are proposing to modify edit diagnostic 0740, When NON_RES_ALIEN_FLG equals 'Y' all Race/Ethnicity flags must equal 'N' to allow the reporting of any of the Race/Ethnicity flags to be reported as ‘Y’ when the non-resident alien flag is ‘Y’. For example, if the non-resident alien flag is “Y”, then one or more of the other race flags may be reported as “Y”, or they may be all N’s.

Final Disposition: Approved; Implementation date Summer 2017
General – Profile Assessment Flag

Description: Modify definition
Topic ID: 100-20
Initiator: Board-IRM
Affects: ADM, SIF, SIFP

We are proposing to update the definition for the Profile Assessment Flag (01354). It currently reads as “This flag indicates whether a first-time-in-college (FTIC) student is admitted on the basis of a profile assessment.”

We are proposing to change “is admitted” to “was admitted”. The new definition will read as “This flag indicates whether a first-time-in-college (FTIC) student was admitted on the basis of a profile assessment.

Final Disposition: Approved; Implementation Date Summer 2017
General – UF Online and Innovation Academy Edit

Description: New Edit
Topic ID: 100-30
Initiator: Board-IRM
Affects: SIFP, SIF, SIFD, HTD, SFA

We are proposing to add a new edit on the UF Online and Innovation Academy (02084) element on the ENROLLMENTS table to check for a corresponding Admissions record. For example, if the student’s enrollment record is reported as ‘O – UF Online Program’ at the time of most recent admission, the student’s corresponding admissions record should be reported as ‘O – UF Online Program’ as well.

**Final Disposition: Approved; Implementation Date Summer 2017**
General – UF Online and Innovation Academy

Description: New Value
Topic ID: 100-40
Initiator: Board-IRM
Affects: ADM, SIFP, SIF, SIFD, LAP, HTD, RET, TEF

A new code, M - UF Main, will be added to the UF Online and Innovation Academy (02084) element to indicate when a student is in a traditional program at the University of Florida.

Final Disposition: A new value, “M-U现代化 Main”, will be added and the current value, “I-Innovation Academy”, will be modified to “I-U现代化 Main-Innovation Academy”.
Pending further discussions with UF and final approval
Implementation Date: Summer 2017
General – Internal Native Transfers

Description: New Procedure
Topic ID: 100-50
Initiator: Board-IRM
Affects: ADM, SIF

We are proposing to add a new procedure for those universities that have multiple IPEDS IDs (Currently UF, USF).

When a student transfer from one campus to another, we are proposing that a new admissions record be required. For USF, the campus will be reported on the Administrative Campus Code (02050).

When a student transfer from a non-traditional program to a traditional program or vice versa, we are proposing that a new admissions record be required. For example PACE students at UF can get admitted into UF online initially and transfer to UF Main after 60 credits. When they transfer to UF Main, a new admissions record will be required. The UF Online and Innovation Academy (02084) element should be reported accordingly.

This will allow us to more accurately track these students for retention and graduation rates reporting.

**Final Disposition:** A new procedure will be **implemented Summer 2017** for when PACE students that are admitted into UF online initially and transfer to UF Main after 60 credits. When they transfer to UF Main, a new admissions record will be required and the UF Online and Innovation Academy (02084) element should be reported accordingly.

**Further discussions are needed with USF. This procedure will not be implemented for them.**
General – Resubmission Comparison Report

Description: New SUDS Report
Topic ID: 100-60
Initiator: Board-IRM
Affects: All Submissions

A new SUDS report, Resubmission Comparison Report, will be added to all submissions to capture the differences between what was previously submitted/accepted and what is being resubmitted. The report will display all elements on the submission, with the old and new frequencies as well as delta counts.

Final Disposition: Approved; Implementation Date Summer 2017
Admissions – GPA High School

Description: Modify Edit
Topic ID: 150-10
Initiator: Board-IRM
Affects: ADM

We are proposing to modify Edit Diagnostic 0685, GPA_High_School must be provided when Stu_Typ = J or U and Fee_Class_Res = F, T or N and Deg_Highest_Held not = A, C or B and Stu_Class_Level = L and Final_Adm_Action = A and HS_ETS_CD is not 888888 or XXXXXX.

Board of Governors Regulation 6.004 (4)(a) applies to transfers with less than 30 transferrable semester hours. It states that “…transfers students seeking admission to the lower division of a state university must satisfy the same admission requirements as first-time-in-college (FTIC) freshmen as specified in Board Regulation 6.002.”

This edit currently applies to all transfer students. We are proposing to modify this edit to apply only to those students transferring in with less than 30 credit hours to align with BOG Regulation 6.004 (4)(a).

Final Disposition: Further discussions are needed.

Transfer hours are reported on SIF, which is submitted after Admissions. Therefore the edit cannot be modified as proposed.

The codes below on the Final Admission Action element (01135) need to be re-evaluated to ensure accurate reporting of students that are admitted.

- P Provisionally Admitted, not an Exception to Policy
- X Provisionally Admitted, is an Exception to Policy
Admissions – Final Admission Action (Edit 5358)

Description: Modify Edit
Topic ID: 150-20
Initiator: Board-IRM
Affects: ADM

We are proposing to modify Edit Diagnostic 5358, When Final_Adm_Action = A and Stu_Typ = J or U, Fee_Class_Res = F, T or N, GPA_College < 2, GPA_High_School >= 2.5 and GPA_High_School < 3, Stu_Class_Level = L and GPA/Admission Test scores < acceptable ADMISSION SCALE then exception_typ value of T, M or G must exist.

Board of Governors Regulation 6.004 (4)(a) applies to transfers with less than 30 transferrable semester hours. It states that “…transfers students seeking admission to the lower division of a state university must satisfy the same admission requirements as first-time-in-college (FTIC) freshmen as specified in Board Regulation 6.002.”

This edit currently applies to all transfer students. We are proposing to modify this edit to apply only to those students transferring in with less than 30 credit hours to align with BOG Regulation 6.004 (4)(a).

Final Disposition: Further discussions are needed.

Transfer hours are reported on SIF, which is submitted after Admissions. Therefore the edit cannot be modified as proposed.

The codes below on the Final Admission Action element (01135) need to be re-evaluated to ensure accurate reporting of students that are admitted.

- P Provisionally Admitted, not an Exception to Policy
- X Provisionally Admitted, is an Exception to Policy
Admissions – Final Admission Action (Edit 5802)

Description: Modify Edit  
Topic ID: 150-30  
Initiator: Board-IRM  
Affects: ADM

We are proposing to modify Edit Diagnostic 5802, 10% Tolerance exceeded for Diagnostic Code 0685 - missing GPA_High_School when Stu_Typ = J or U and Fee_Class_Res = F, T or N,
Deg_Highest_Held not = A, C or B, Stu_Class_Level = L and Final_Adm_Action = A and
HS_ETS_CD is not 888888 or XXXXXX.

Board of Governors Regulation 6.004 (4)(a) applies to transfers with less than 30 transferrable semester hours. It states that “…transfers students seeking admission to the lower division of a state university must satisfy the same admission requirements as first-time-in-college (FTIC) freshmen as specified in Board Regulation 6.002.”

This edit currently applies to all transfer students. We are proposing to modify this edit to apply only to those students transferring in with less than 30 credit hours to align with BOG Regulation 6.004 (4)(a).

**Final Disposition:** Further discussions are needed.

Transfer hours are reported on SIF, which is submitted after Admissions. Therefore the edit cannot be modified as proposed.

The codes below on the Final Admission Action element (01135) need to be re-evaluated to ensure accurate reporting of students that are admitted.

- P Provisionally Admitted, not an Exception to Policy
- X Provisionally Admitted, is an Exception to Policy
College Prep Completions – Scholastic Assessment Test (SAT)

Description: Modify Values List
Topic ID: 175-10
Initiator: Board-IRM
Affects: ADM

A new code, **S2 - 2016 Scholastic Assessment Test**, will be added to the Test Determining Remediation (01145) element on the COLLEGE_PREP table to allow the reporting of the 2016 Scholastic Assessment Test. The size of this element will increase from one character (VARCHAR2(1)) to 2 characters (VARCHAR2(2)).

**Final Disposition: Approved; Implementation date Summer 2017**
Hours to Degree – Credit Hour Testing Method

Description: Modify Values List
Topic ID: 200-10
Initiator: Board-IRM
Affects: HTD

A new code, **S2 - 2016 Scholastic Assessment Test**, will be added to the Credit Hour Testing Method (01488) element on the COURSES_TO_DEGREE table to allow the reporting of the 2016 Scholastic Assessment Test.

**Final Disposition: Approved; Implementation date Summer 2017**
Hours to Degree – Accountability Report HTD Exempt Summary

Description: Modify Report
Topic ID: 200-20
Initiator: Board-IRM
Affects: HTD

We are proposing to modify the Hours to Degree Exempt Summary report to eliminate duplication of exempt hours for internship credits.

<table>
<thead>
<tr>
<th>EXEMPTED CATEGORIES</th>
<th>TOWARD DEGREE</th>
<th>TOWARD DEGREE</th>
<th>TOTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>A</td>
<td>B</td>
<td>C</td>
<td>D</td>
</tr>
</tbody>
</table>

Final Disposition: Approved; Implementation date Summer 2017
Hours to Degree – Excess Hours Degree Report by Student Detail

Description: Modify Report
Topic ID: 200-30
Initiator: Board-IRM
Affects: HTD

We are proposing to modify the Annual Excess Hours Degree Report by Student Detail to include a new column “max_apprvd_cat_hrs”.

Final Disposition: Approved; Implementation date Summer 2017
Degrees Awarded – Degree – Level Granted

Description: Modify Edit
Topic ID: 250-10
Initiator: Board-IRM
Affects: SIFD

We are proposing to modify Edit Diagnostic 5265, DEG_LEVEL_GRANTED on the DEGREES_AWARDED table equals DEG_HIGHEST_HELD on the ENROLLMENTS table. Currently this edit has a level 8: Allowable Tolerance if the Degree – Level Granted is equal to the Degree - Highest Level Held on the Enrollments table. We propose modifying this edit to disregard students with a Type of Student at Time of Most Recent Admission equal to Post Baccalaureate, Degree Seeking Student (S).

Final Disposition: Approved; Implementation Date Summer 2017
Student Financial Aid – Financial Aid Award Identifier

Description: New Value and Category
Topic ID: 300-10
Initiator: Board-IRM
Affects: SFA

We are proposing to add a new value to the Financial Aid Award Identifier (01253) on the FINANCIAL_AID_AWARDS table to report third-party payments. We will also be adding another category, ‘4** - Third Party Payments’.

| 401 | **Third-party billing:** Funds provided to the university by a third-party sponsor (e.g., embassy, government agency, private company, or service organization, etc…) that pays all, or a portion, of a student’s invoice directly to the university via a special billing process. These payments cannot be contingent on academic performance or employee reimbursement policies. These funds do not include Florida Pre-Paid, university foundation funds, or any other 529 savings plans that parents/students previously paid. |

Final Disposition: Approved with the additional language in red. **Implementation date Summer 2018 2017**

Note: It was decided after the Data Workshop to make the effective date for this change beginning Summer 2017 (award payment term = 201705) that is included in the 2016-17 SFA software. Third party payments will be nulled for the 201607, 201608, 201701 terms.
Student Instruction – Fee Waiver Kind/3rd Pary Kind

Description: Removal of Element
Topic ID: 350-10
Initiator: Board-IRM
Affects: SIF, SIFP

We are proposing to remove the Fee Waiver Kind/3rd Party Kind (01108) element and replace it with a new element. Any existing edits on this element will be updated with the new values or deleted accordingly. The modifications of the edits will be sent out after it has been decided what the new codes for the new waiver values will be.

Final Disposition: Approved; Implementation date Summer 2017
Student Instruction – Waiver Indicator/3rd Party Indicator

Description: Removal of Element
Topic ID: 350-20
Initiator: Board-IRM
Affects: SIF, SIFP

We are proposing to remove the Waiver Indicator/3rd Party Indicator (01463) element. The reporting of 3rd party payments will now be reported on the Student Financial Aid (SFA) submission on Financial Aid Award Program Identifier (01253) element.

Final Disposition: Approved; Implementation date Summer 2017
Student Instruction – Waiver/Exemption Type

Description: New Element
Topic ID: 350-30
Initiator: Board-IRM
Affects: SIF, SIFP

We are proposing to add a new element, Waiver/Exemption Type (01109).

**Definition:** An element that indicates the type of waiver or exemption granted to a student in a given academic term.

**Supportive Information:** Waivers and exemptions refer to the reduced costs related to tuition and fees. All waivers and exemptions have a legal basis in statute. In some cases, statute provides universities discretion whether to provide a statutory waiver to an eligible student. In addition, each university board of trustees is authorized by statute to waive tuition and associated fees for purposes that support and enhance the mission of the university. All university waivers must be based on regulations that are adopted by the university board of trustees and where applicable, are consistent with regulations adopted by the Board of Governors.

It is important to note the following: (1) University waivers do not include funds for which students are liable for payment but have not yet been fully paid (e.g., guaranteed fees). Delinquent/partial payments is an accounting issue that is internal to the university. (2) This waiver/exemption element does not include any funds paid by third-party entities on a student’s behalf (e.g., sponsored credit institutes) – such funds should be reported on the financial aid award program identifier [#01253]. (3) Waivers do not include students who were legislatively ‘grandfathered’ from paying new fees (e.g., excess hours, tuition differential fee).

[See Appendix 1 for new values]

**Final Disposition:** Approved; Block Tuition has been removed. Implementation date Summer 2017
Student Instruction – Room Number Digits (Edit 5336)

Description: Modify software
Topic ID: 350-40
Initiator: Board-IRM
Affects: SIF

We are proposing to modify Edit Diagnostic 5336, No matching Room record found within REPT_TIME_FRAME by REPT_INST, SITE_NBR, BLDG_NBR, ROOM_NBR_PREFIX, ROOM_NBR_DIGITS, ROOM_NBR_SUFFIX.

Only those classes with an Unscheduled Meeting Time Flag (element 01197) value of X (Scheduled) will be checked against the new space system for a valid building number, room prefix, room digit, and room suffix.

Not all buildings and rooms are now reported in the new space system. This modification will prevent those classes that take place in rooms unreported in the new space system to be identified as an error.

Final Disposition: Approved; Implementation date Summer 2017
Student Instruction – Room Number Digits (Edit 5367)

Description: Modify software
Topic ID: 350-50
Initiator: Board-IRM
Affects: SIF

We are proposing to modify Edit Diagnostic 5367, Classes not allowed to be assigned to out-of-use rooms.

Only those classes with Unscheduled Meeting Time Flag (element 01197) value of X (Scheduled) will be checked against the new space system to verify that the room has a room use code that is in use.

Final Disposition: Approved; Implementation date Summer 2017
## Appendix 1. Waiver/Exemption Type (element #01109).

<table>
<thead>
<tr>
<th>New Value</th>
<th>Waiver/Exemption</th>
<th>Discretionary Group</th>
<th>Statutes as of January 2017</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>5000</td>
<td>Dependent of Deceased – Law Enforcement</td>
<td>Mandatory</td>
<td>F.S. 112.19(3)</td>
<td>Tuition and fees for up to 120 credit hours are waived for the children and spouse of law enforcement officers deceased in the line of duty, who are enrolled in a certificate, undergraduate, or postgraduate program.</td>
</tr>
<tr>
<td>5001</td>
<td>Dependent of Deceased – Firefighter</td>
<td>Mandatory</td>
<td>F.S. 112.191(3)</td>
<td>Tuition and fees for up to 120 credit hours are waived for the children and spouse of firefighters deceased in the line of duty, who are enrolled in a certificate, undergraduate, or postgraduate program within program.</td>
</tr>
<tr>
<td>5002</td>
<td>Dependents of Deceased Teachers</td>
<td>Mandatory</td>
<td>F.S. 112.1915</td>
<td>Tuition and fees for up to 120 credit hours are waived for the children of teachers and administrators deceased in the line of duty, who are enrolled in a certificate and undergraduate program.</td>
</tr>
<tr>
<td>5003</td>
<td>Victims of Wrongful Incarceration</td>
<td>Mandatory</td>
<td>F.S. 961.069(b)</td>
<td>Tuition and fees for up to 120 credit hours are waived for the wrongfully incarcerated persons who meets admission criteria and maintains satisfactory academic progress.</td>
</tr>
<tr>
<td>5004</td>
<td>Dual Enrolled</td>
<td>Mandatory</td>
<td>F.S. 1009.25(1)(a)</td>
<td>A student enrolled in a dual enrollment or early admission program pursuant to s. 1007.271 are exempted from the payment of tuition and fees.</td>
</tr>
<tr>
<td>5005</td>
<td>DCF - Foster Care/State Custody</td>
<td>Mandatory</td>
<td>F.S. 1009.25(1)(c)</td>
<td>A student who is or was at the time he or she reached 18 years of age in the custody of the Department of Children and Families are exempted from the payment of tuition and fees. Such exemption includes fees associated with enrollment in applied academics for adult education instruction. The exemption remains valid until the student reaches 28 years of age. <em>Note: This code aligns with box 1 on both the old and new DCF tuition exemption forms.</em></td>
</tr>
<tr>
<td>5006</td>
<td>DCF - Adopted</td>
<td>Mandatory</td>
<td>F.S. 1009.25(1)(d)</td>
<td>A student who was adopted from the Department of Children and Families after May 5, 1997 are exempted from the payment of tuition and fees. Such exemption includes fees associated with enrollment in applied academics for adult education instruction. The exemption remains valid until the student reaches 28 years of age. <em>Note: This code aligns with box 2 on both the old and new DCF tuition exemption forms.</em></td>
</tr>
</tbody>
</table>
### Appendix 1. Waiver/Exemption Type (element #01109).

<table>
<thead>
<tr>
<th>New Value</th>
<th>Waiver/Exemption</th>
<th>Discretionary Group</th>
<th>Statutes as of January 2017</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>5007</td>
<td>DCF – Non-State Custody</td>
<td>Mandatory</td>
<td>F.S. 1009.25(1)[c-d]</td>
<td>A student who is or was at the time he or she reached 18 years of age in the custody of a relative or nonrelative under s. 39.5085 or student who, after spending at least 6 months in the custody of the Department of Children and Families after reaching 16 years of age, was placed in a guardianship by the court are exempted from the payment of tuition and fees. <em>Note: This code aligns with boxes 3&amp;4 on both the old and new DCF tuition exemption forms and box 5 on the new form.</em></td>
</tr>
<tr>
<td>5008</td>
<td>Homeless</td>
<td>Mandatory</td>
<td>F.S. 1009.25(1)(f)</td>
<td>A student who lacks a fixed, regular, and adequate nighttime residence or whose primary nighttime residence is a public or private shelter designed to provide temporary residence for individuals intended to be institutionalized, or a public or private place not designed for, or ordinarily used as, a regular sleeping accommodation for human beings are exempted from the payment of tuition and fees.</td>
</tr>
<tr>
<td>5009</td>
<td>DCF - Child Welfare Personnel</td>
<td>Mandatory</td>
<td>F.S. 1009.25(1)(h)</td>
<td>Child protection and child welfare personnel, who are enrolled in an accredited bachelor’s degree or master’s degree in social work program, are exempted from the payment of tuition and fees provided that the student attains at least a grade of “B” in all courses.</td>
</tr>
<tr>
<td>5010</td>
<td>Purple Heart / Military Honor</td>
<td>Mandatory</td>
<td>F.S. 1009.26(8)(a-c)</td>
<td>A state university shall waive tuition for undergraduate college credit programs and career certificate programs for each recipient of a Purple Heart or another combat decoration superior who is enrolled in an associate, bachelor, or certificate programs and is currently, or was at the time of the military action that resulted in the awarding of the Purple Heart or other combat decoration superior in precedence, a resident of this state.</td>
</tr>
<tr>
<td>5011</td>
<td>Psychology Internship</td>
<td>Mandatory</td>
<td>F.S. 1009.26(5)</td>
<td>Any graduate student enrolled in a state-approved school psychology training program shall be entitled to a waiver of registration fees for internship credit hours applicable to an internship in the public school system under the supervision of a Department of Education certified school psychologist employed by the school system.</td>
</tr>
<tr>
<td>5012</td>
<td>Non-Resident</td>
<td>Mandatory</td>
<td>F.S. 1009.26(12)</td>
<td>A state university shall waive out-of-state fees for students who meet the following conditions: (1) Attended a secondary school in this state for 3 consecutive years immediately before graduating from a high school in this state; (2) Apply for enrollment in an institution of higher education within 24 months after high school graduation; and, (3) Submitted an official Florida high school transcript as evidence of attendance and graduation. This includes, but is not limited to, students who are undocumented for federal immigration purposes.</td>
</tr>
</tbody>
</table>
### Appendix 1. Waiver/Exemption Type (element #01109).

<table>
<thead>
<tr>
<th>New Value</th>
<th>Waiver/Exemption</th>
<th>Discretionary Group</th>
<th>Statutes as of January 2017</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>5013</td>
<td>C.W. Bill Young Veteran Tuition</td>
<td>Mandatory</td>
<td>F.S. 1009.26(13)</td>
<td>A state university shall waive out-of-state fees for a person who is: (1) An honorably discharged veteran of the United States Armed Forces, the United States Reserve Forces, or the National Guard who physically resides in this state while enrolled in the institution; or (2) Entitled to and uses educational assistance provided by the United States Department of Veterans Affairs for a quarter, semester, or term beginning after July 1, 2015, who physically resides in this state while enrolled in the institution.</td>
</tr>
<tr>
<td>5014</td>
<td>Active Duty Military</td>
<td>Mandatory</td>
<td>F.S. 1009.26(14)</td>
<td>A state university shall waive out-of-state fees for a person who is an active duty member of the Armed Forces of the United States residing or stationed outside of this state.</td>
</tr>
<tr>
<td>5015</td>
<td>State Employees</td>
<td>Mandatory</td>
<td>F.S. 1009.265</td>
<td>As a benefit to the employer and employees of the state, subject to approval by an employee’s agency head or the equivalent, each state university institution shall waive tuition and fees for state employees to enroll for up to 6 credit hours of courses per term on a space-available basis.</td>
</tr>
<tr>
<td>5500</td>
<td>Florida Linkage Institute</td>
<td>Discretionary</td>
<td>F.S. 288.8175(5)</td>
<td>Each institute may exempt 25 FTE students per year from the host countries as resident students for tuition purpose. The criteria for selecting such students must be approved by the Department of Education and students must return to their home countries for a length of time equal to their exemption period.</td>
</tr>
<tr>
<td>5501</td>
<td>Tuition Differential Fee for FSAG-eligible</td>
<td>Discretionary</td>
<td>F.S. 1009.24(16)(b)(8)</td>
<td>The tuition differential may be waived by the university for students who meet the eligibility requirements for the Florida public student assistance grant established in s. 1009.50.</td>
</tr>
<tr>
<td>5502</td>
<td>Teacher Intern Supervisor</td>
<td>Discretionary</td>
<td>F.S. 1009.26(2)</td>
<td>A state university may waive any or all application, tuition, and related fees for persons who supervise student interns for a state university.</td>
</tr>
<tr>
<td>5503</td>
<td>Faculty/Staff Employees</td>
<td>Discretionary</td>
<td>F.S. 1009.26(3)</td>
<td>A state university may waive any or all application, tuition, and related fees for persons who meet academic requirements to enroll for up to 6 credit hours of tuition-free courses per term on a space-available basis.</td>
</tr>
<tr>
<td>5504</td>
<td>Senior Citizen Audit</td>
<td>Discretionary</td>
<td>F.S. 1009.26(4)</td>
<td>A state university may waive any or all application, tuition, and related fees for persons 60 years of age or older who are residents of this state and who attend classes for credit. No academic credit shall be awarded for attendance in classes for which fees are waived under this subsection. This privilege may be granted only on a space-available basis.</td>
</tr>
</tbody>
</table>
### Appendix 1. Waiver/Exemption Type (element #01109).

<table>
<thead>
<tr>
<th>New Value</th>
<th>Waiver/Exemption</th>
<th>Discretionary Group</th>
<th>Statutes as of January 2017</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>5505</td>
<td>Public School Classroom Teacher</td>
<td>Discretionary</td>
<td>F.S. 1009.26(10)</td>
<td>A state university may waive tuition and fees for a classroom teacher employed full-time for up to 6 credit hours per term on a space-available basis in undergraduate courses approved by the Department of Education. Such courses shall be limited to undergraduate courses related to special education, mathematics, or science. The waiver may not be used for courses scheduled during the school district’s regular school day.</td>
</tr>
<tr>
<td>5506</td>
<td>BOT Approved – Graduate Assistants</td>
<td>Discretionary</td>
<td>F.S. 1009.26(9)</td>
<td>If a university BOT approves a policy to waive tuition or the out-of-state fee to students who serve as Graduate Assistants. This is independent of section 1009.24(5) Florida Statutes.</td>
</tr>
<tr>
<td>5507</td>
<td>BOT Approved – All Other</td>
<td>Discretionary</td>
<td>F.S. 1009.26(9)</td>
<td>All other situations in which a university BOT has authorized the administrative staff to waive tuition and out-of-state fees for purposes that support and enhance the mission of the university.</td>
</tr>
</tbody>
</table>