**Florida Higher Education Summit**  
**SUS Data Workshop 2010 Notes**

**COLOR Key:**  
- **Blue=Need DA input**  
- **Red=Need the Board input**  
- **Green=Implement**  
- **Orange=Updated since original release (chg date in parens)**

### Breakout Reports

**Admissions and Registrars – Lynda Page, Associate Director, the Board**

Admissions and Registrars met all day.

**Residency**

Residency Committee co-chair changed.  
Recognized Ann Dziadon, University Registrar, UWF – outgoing residency committee co-chair.  
Janice Finney, Director of Admissions, FSU is new co-chair.

Monoka Venters, Education Policy Analyst, the Board updated the Residency committee on the residency regulation issue. Legislative staff will review the regulation issue over the summer. Once the Board office has a decision on the regulation issue, we will notice a Board of Governors regulation.

Heather Sherry, Florida Department of Education, talked about Higher Ed Coordinating (HEC) Council. The 2010 Legislature established a new education entity: The Higher Education Coordinating Council (FS 1004.015). This council will explore 2+2 articulation policy in Florida. Florida Statutes, State Board of Education (SBE) rules, and the Articulation Coordinating Committee (ACC) provide the framework for this very important vehicle for student success in Florida’s higher education system. Current challenges to 2+2 articulation will be presented and policy options discussed.  

New Statute added Career Tech Centers and paragraph addressing residency approval transfer (Laws of Florida Ch. 2010-155, HB 5201 [http://laws.flrules.org/files/Ch_2010-155.pdf](http://laws.flrules.org/files/Ch_2010-155.pdf)). This was already in regulation, but the statute affirms it.

HEC Council has been tasked with making the Residency process more efficient - to provide recommendations for legislative action.

Two chairs of subcommittees – Harry DeMik, University Registrar, FAU and John Yancey, Director of Admissions, UNF are to provide additional support.

**Excess Hours**

Excess Hours issues were discussed.
The efficacy of this effort given the small effect that is anticipated was questioned. A statute change may be appropriate, the language may be tweaked. Members of the A&R committee should be included in the discussions.

Other
CIP code change starts with Summer 2010.

New Placement test being piloted, Florida Postsecondary Education Readiness Test (PERT). Cut scores need to be identified.

Need for clarification in FTIC regulation re: Foreign language requirements. Are those students lacking foreign language Profile Admits? Student with 2nd year only violates letter, not intent of rule. Language needs to be changed.

Heather Sherry – Talked about the charge to Articulation Coordinating Committee (ACC) concerning the direction of post-secondary education in Florida and 2+2 issue. Reality is that if all AA students want to enroll in SUS, there is not enough room – potentially violates law. This issue will be addressed by HEC.

ACC is tackling curriculum issues affecting the 2+2 process. Also in question is the AA GPAs, especially 2.0

Discussed HS/AA graduates. How do they perform?

Talked about college level academic skills (CLAS) issues. Move to recognized good work Universities are doing concerning student learning outcomes, etc. Goal: convince legislature to eliminate the testing requirements that are in statute.

Budget
Two Budget Meetings

1st Meeting - John Frady, Senior Budget Analyst, the Board with Budget Directors.

Looked at General Revenue distribution – normal release is the current plan.
Instruction & Research (I&R) centers are now Academic Infrastructure Support Organizations (AISO) approved by the Board of Governors (only 3 at UF and FSU).
Clarification (7/2/2010 @ 4:30pm): For the annual operating budgets, all I&R Centers will be reported using PCS code 21. The only exceptions will be for the Board of Governors – approved Academic Infrastructure Support Organizations (AISO), which will report using the new PCS code 20. There are currently two AISO’s at the University of Florida, and one at the University of South Florida.
It has been proposed that Salary Category Detail (SCD) and Expenditure Analysis (EA) be moved up for review before sending to the Governor. Most of the errors on IRD are discovered after submission of the EA. This will be discussed with the Data Administrators (DAs) on their conference call on July 13, 2010.

Several DAs noted that Instruction & Research Data (IRD) due dates are affected also. This caused some concern. It was noted that the date changes would be discussed in the data portion of the workshop.

Discussed waivers, sponsored research budgets and prior year expenditures.

2nd Meeting
Kristie Harris, Budget Director, the Board – spoke about the 2010-11 budget.
Janet Owen, Vice President for Governmental Affairs, UNF – provided a legislative update.
Michael Lake, Director of University Budgets, FSU – spoke about ARRA
Sherry Austin, Director of University Budgets, UF – spoke about decentralized budgeting method new implemented.

Academic Contacts - Richard Stevens

Group discussion of:
SAC’s reviews and other academic related issues on campus

The need for regulation changes relative to Laws of Florida Ch. 2010-78 – implementation of the lawsuit settlement (HB 7237). http://laws.flrules.org/files/Ch_2010-078.pdf

Proposed changes to Program Approval, Common Prerequisites, Program Termination, and Academic Learning Compact regulations.

Compliance issues/requirements being addressed more by OPPAGA, Auditor General, etc.

Stair step accountability and ways to better document compliance with Board of Governors and university regulations for external reviewers.

Efficiencies for Universities with regard to different academic program issues. Terminations of under used programs, etc.

Space – No Report.

Medical School – Charlene Coles, Subject Matter Expert, the Board-IRM

Q: What are minimum requirements for reporting classes in Student Information File (SIF)
A: Not required since they do not earn hours and can have different terms.
We were asked to put the answer in writing. NEW FAQ #573

Q: Is it optional?
A: Courses are optional for the SIF, but are required for IRD.

Q: How are medical students determined?
A: Count any student seeking an MD degree from the Fall SIF Final file.

Q: Is it part of issue of space funding?
A: No, we don’t include medical courses in space utilization.

Q: How are joint MD/PhD students coded?
A: There are no Board of Governors/IRM rules regarding this, but UF considers PhD outside of the Medical budget entity. So, when the joint MD-PhD student enters the PhD portion of study (2yr MD -> 3yrs PhD -> 2yrs MD) they are no longer enrolled in the MD program. Thus, for those 3yrs they are PhD-degree seeking student, not MD seeking.

Q: What are the rules for reporting faculty workload? For example, one course can have 50 professors each with multiple funding sources. Also, faculty reporting for clerkships can have a mix of regular and courtesy faculty.
A: For each funding source (E&G, Medical, Non-compensated) and for each person, there should be a piece of the course reported. If the course is a mix of regular and courtesy faculty, and the courtesy are under the control of the regular, then you could report only the regular faculty.

Q: How to count students during 3rd and 4th year clerkships (not on semester schedule)?
A: Report student records in the term that the clerkship ends.

Recommendation:
Medical school data folks should set up a listserv to enable private communication.

**Annual Report – Jason Jones, Education Policy Analyst, the Board**

Dottie Minear, Senior Associate Vice Chancellor, the Board spoke concerning how annual report fits in with strategic planning.

Due Date Proposed Schedule was discussed with quite a bit of feedback and questions. Some dates and expectations are still outstanding and under discussion. It was noted that a new site will be created for data entry and review.

**Annual Report Highlights –**
* Funding per student - added actual tuition revenues collected
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* FTE definition – will stay the same due to mixed feedback, except funding for student.  
* Graduation rate – added the standard federal 6-year rate  
* Degrees Granted – Pell degree count definition expanded. The 2010 annual report will include students across SUS institutions. The suggestion to expand this further to include Florida College System (FCS) students is being reviewed.  
* Licensure Pass Rates were discussed. Only professions that REQUIRE a test to practice immediately will be included (FTCE, FELE, Pharmacy, Law, MD, Dentistry, Veterinary Med.)  
* Degree counts – clarified how degrees are counted for the annual report. No data administrators thought they were coding students with greater than 1 for fraction of a degree (follow-up note: IRM will do a frequency count to understand the scope of this phenom)  
* Tuition Differential – added two fields from their annual proposals (count of students receiving financial aid from differential funds, and average amount of award). Also, adding Prepaid Tuition Scholarship recipients to the fields reporting differential waivers.  
* R&D tables - Discussed, clarified changes.  

Q: Asked why EA due date is being updated since nothing in the report uses EA as source data.  
A: IRD problems were often not identified until the time of EA submittal.  

**EEO** – Cheryl Seals-Gonzalez, Director, Office of Institutional Equity, FGCU  

14 attendees (4 from UF)  

Lina Monell, Director, Equal Opportunity Program, UNF is retiring and Cheryl Seals-Gonzalez will be moving from FGCU to UNF at the end of summer.  

Equity Reports due – NCF already submitted.  

Monoka Venters is liaison – replacing Sundra Kincey formally with the Board and now at FAMU.  

A workgroup composed of representatives from the Council on Equal Opportunity and Diversity and the Council of Counsels will review the new equity regulation over the summer. The work group hopes to have the equity regulation ready to notice at the Board meeting on September 16, 2010. If the equity regulation is noticed in September, it would come before the Board for final approval at the November 18, 2010 Board meeting.  

**Data Administrators Meeting – Ramon Padilla, Assistant Vice Chancellor, the Board**
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SUDS Listserv will be created for anyone using SUDS. It will be outgoing only. Questions should still go to FAQ. Data Requests not a part of the new listserv purpose.

Data Workshop Next year – Tampa: June 12\textsuperscript{th}-16\textsuperscript{th}.

Application Express is only guaranteed to work with Internet Explorer and Firefox. We know it will not properly work in Chrome, SAFARI, Opera, and there may be others.

Reporting Instance to be enhanced. Direct connect to underlying tables will be provided: one server connection per University. Data Administrators should have their technical team get in contact with Ramon to work out the details.

Getting a data sharing agreement in place is high priority

Download capability
Must have data sharing agreement in place
Universities do not need SSN as long as they have UNIV\_ROW\_ID
Disburse program/sql code via this function

SUDS
New Edit in SUDS: Level X (must resubmit) if SSN is found in any of the U\_RESV fields. Working on resubmit process that will allow updates at the record level instead of wholesale re-upload of tables.
Will add Retention submission this year

Oracle OBIEE will be tied to Reporting Instance.

Quarterly Data Administrator’s conference calls will be re-instated. First will be July 13, 2010.

Conference Feedback
  More materials provided in advance. To be able to make more informed decisions about which meetings to attend.
  Add an extra half day at the beginning.
  Add a group (Birds of a Feather) for the technical staff that work on the data and/or ERP systems. Provide meetings for this group specifically.
  Add an orientation session for new attendees
  Add Financial Aid Directors
  More involvement of Florida College System

Ramon explained the move and benefits to single Oracle server from RAC.
Discussed the Statewide Longitudinal Data Systems (SLDS) Grant for $2 million for enhancement of SUDS.

**IPEDS**

No major changes this year. See handout.

Fall Enrollments vary between the Board data and University data. We are not sure why, but will be addressing this with individual Universities.

Part E – was it helpful to have IRM provide this data? A majority thought they would like to see it and know the criteria and code for its selection.

Part D – IRM will produce these numbers and see where they are differences. Again, criteria and actual code should be provided.

*We can send criteria and code. The format for the criteria should be human readable (ie. 1. select all FTIC; 2. eliminate xyz...)*

We will start with presenting the numbers and finding the differences, so that the universities can verify them. If we can come to consensus, we can produce and load them and then everyone’s numbers would have the same selection criteria. This has also provided a method to discover missing SSN changes in the data. Fixing them here makes the GRS easier.

Knowing how numbers are calculated is key to this process. With annual report we intend to add information about the exact calculation of numbers. We can do something similar for IPEDS reporting also.

Universities are still not comfortable with the Board preparing Part E. But, some items need to match, so we need to have agreement on items. the Board will provide data for everyone or no one. A decision will need to be made.

IPEDS Residency – NCF questioned FTIC by residence. We collect citizenship code for non-resident aliens even if they reside in the states. This is not what IPEDS wants, but it is what we have. To report actual residence, we would need a new field and permanent residence for college students is a problem.

Race codes for non-resident aliens are not collected, non-resident aliens are not included under OCR regulations and their race is not reported to the USDOE.

*File Due Dates*

EA/IRD Due Dates:
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Original due dates: IRD October 4; EA October 26  
Budget Office proposed due dates (6 working days earlier)  
IRD September 24; EA October 18  
There was much debate and the consensus is that it will make the data less reliable. There are problems in getting activity effort for spring at the same time as Fall Enrollment for SIF. Some needed a week in between IRD and EA and most could not do this on a term-by-term basis.

There is a need for the EA for the annual report deadlines. Better edits were suggested as a help.

Ramon – Summary – we need at least one week between submissions. Pushing forward is not a good idea for DAs. Conference call will address this on July 13, 2010.

HTD: Since UCF is the only one doing a term submission they would like to confer on the due dates.  
Final HTD term dues dates for 2010-11 are as follows: Summer 2010—11/5/10, Fall 2010 – 3/8/11, and Spring 2011 – 7/22/11

General Discussion
Level X (must resubmit) if SSN is found in any of the U_RESV fields as decided at the Wednesday Data Administrators meeting

Report CIP2010 on all submissions and all occurrences of program code on files reflecting the summer 2010 term and beyond.

PERSON_DEMO table – all submissions  
§ Implement new Race/Ethnicity requirements on all submissions that reflect data beginning with Summer 2010  
§ Update edit 5266 to take into account the NON_RES_ALIEN_FLG  
§ Use full birth date to determine age on diagnostics 0444 and 0645  
§ PID_VALID_SSN = ‘N’ will be allowed for Non-resident Aliens on financial submissions (IRD, SCD, EMPL)

Add edit frequencies in Beta if possible

Add Level X diagnostic for missing UNIV_ROW_ID on all submissions and all tables

Remove extraneous DEMO_DATA_SOURCE and DEMO_TIME_FRAME from input files on all submissions and tables (universities should send as dot ‘.’) – see latest table layouts at http://www.flbog.org/resources/FHES10

FTE calculation will remain as is.
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OPERATING BUDGET – Add a fund identifier code for FSU
DONE, code = 026258  FSU - STUDENT WELLNESS CENTER BOND ISSUE

IRD – No one would like to submit by term.

PERSON_DEMO – see General Discussion
§     PID_VALID_SSN = ‘N’ will be allowed for Non-resident Aliens
SSN exemptions
For pay plan 99 (non SUS compensated) allow PID_VALID_SSN = ‘N’ and 9999-99-99 in
DATE_OF_BIRTH.

WORKLOAD_ACTIVITIES
§     Diagnostic 0200: UCF will be added to the list of institutions that can report code 17
(Clinical Instruction)
§     The College Subcomponent on this file must match the corresponding expenditures on
the submitted Operating Budget salaries and benefits. This is one of the match fields for
Expenditure Analysis

§     Summary course section records will no longer be allowed
o     The edit will not allow for a ‘9’ in course section type.

SCD
Reserves – Can we carry only summer rate reserves and report all other reserves as Other?
Yes, Remove codes P (Professional Excellence) and R (Teaching Incentive) from the valid
values for Employment Resource Type Code, SUS (01181)…these should now be reported
under O (Other Rate Reserve)

Can we get rid of some Position Types – Can we remove the ones listed?
Yes, Remove codes A (Authorized but not established) and T (Temporary) from the valid
values for Employment Resource Type Code, SUS (01181)

EMPLOYEE_DEMO
§     New edit: DEG_YR_OF_HIGHEST: If sent, must be a valid year less than or equal to
the reporting term year.
EMPLOYEE_VACANT
§     COMMIT_TYP – the only one that may cause a problem is the county salary amount
for IFAS employees, since the state pays the benefits. Marie will research IFAS type to
confirm.

SPA
Check with the facilities section to see if there are any changes to the file for this year. If not,
release submission in production ASAP. Software was released 6/16/2010.
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Facilities committees to meet and discuss issues.

**College Prep Completions**

What criterion is used to determine completion?  
Lynda Page – College Prep rules are tied to College Placement testing. Statute does not allow the University to waive CPC requirements. “A passing score on a standardized, institutionally developed test must be achieved before a student is considered to have met basic computation and communication skills requirements…” FS 1008.30 (4)(a)

What does ‘failed’ mean for the completion report?  
This indicates the student is not yet a completer.

When are they determined to be a non-completer?  
They are a non-completer as long as they are enrolled and have not met the completion criteria.  
Lynda Page - FS 1008.30 - must be completed within the 1st 12 hours. Exception – as long as the student is in College Prep classes at the same time.

For your College Prep students that completed prior to current term but were accidentally missed, put the term that the student completed in TERM_RESULT_RPTD.

**COLLEGE_PREP**  
§ Remediation Incompletion Code (01148): New codes to ‘remove’ students from the CP population reported on the ADM submission that did not enroll  
  o A - Admitted but not Enrolled  
Can we not tell from the SIF file if a student enrolled?  
- Two options: Add the code and let universities control when these students are removed –OR– run an annual procedure to search for these students on the SIF final submission and update the record submitted with ADM if no enrollment record is found.  
  o I – Incorrectly placed in College Prep Initially  
§ Test Determining Remediation (01145): New code  
  o P - Postsecondary Education Readiness Test (PERT)

**LAP**  
– Annual LAP is not required if you submit by term.

**SIFD**  
**Overall Submission**  
§ University Request: Can SIFD edits use the as-yet-unaccepted data from the same SIF so universities can build both files at the same time?  
Yes. Butch has had problems. FAMU has had problems.  
§ FOLLOW-UP. We found one procedure that was not behaving properly. It was being called by multiple edits so affected a number of edits. This has been corrected. Please provide us with the diagnostic number if this should happen again.
DEGREES_AWARDED
§ Discovred after workshop: Diagnostic 5208 will not allow dot in CIP_DEGREE on the SIFD submission.

ADM
APPLICANTS_ADMITS
§ Last Institution Code (01067): Use ‘F1000000’ for no previous postsecondary institution.
§ If an entering student for the May term will not get their high school degree awarded until June (one month after the beginning of the term), report highest degree held as high school and the June date as the time frame. Diagnostic 1309 will be modified to keep this from being a level ‘9’ error because it is greater than the term date.
§ New Field: 02059 - Military Status affecting the APPLICANT_ADMITS and ENROLLMENTS tables.
  o On the ADM submission the information is generated from the self reported responses to the admission application questions.
  o On the SIF submission these have been verified by the university for accuracy.

The veteran’s office on campus handles will be verifying the veteran status of veterans receiving aid. We hope that other veterans will also make use of the office and we will have even more information. All veterans should go to the Veteran’s Office campus. It is recommended and encouraged.

The Admissions report will be self reported and not verified, the Student file should only include verified veterans.

Active Duty: Do not report to the Veteran’s office even when receiving aid.
We have active duty people that are taken out of GRS cohorts. We will see if we can get the agreement with DOD amended? We can only get use of this data if the information is for accountability. I have not found a way to make that work.

What if a veteran opts not to take benefits, saving the benefits for their children.
We only want those vets that are verified

TESTS_REQS
Q&A 11/5/2004 #6 Admission File Test Scores Question:
1) Should you report the scores from the best composite score, the latest composite score or a combination of the best subscores?
2) If an ACT and SAT are at the same level using a concordance, which should be reported?

Answer:
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1) The score that you report should be the score that you would/will use for admission decisions. If a higher score is received after a decision to admit is made but prior to enrollment, the higher score may be reported on the Admissions file. If one of the tests (SAT or ACT) is taken more than once, the highest sub score (math, verbal, science, English, or reading) can be used in reporting either the sub score for SAT or a recalculated composite for ACT. These are also the instructions for NCAA qualifying. See http://www.ncaa.org/library/general/cbsa/2004-05/2004-05_cbsa.pdf, page 9.

2) A decision should be made on an institutional basis to make one or the other test the primary for SUS reporting. Then, when you find a situation where the scores are equal, you would always select the primary to report. In this way, you are not deciding anything at the individual student level.

§ We discussed using a mix of subscores both ACT and SAT… The above Q&A seems to answer all of our questions. The link in the Q&A is no longer valid.

§ This documentation will be added to the data elements associated with ACT/SAT scores.

§ Propose to collect individual ACT score rather than the composite
All universities have individual scores.
Do not send both composite AND subscores.

SIF/SIFP

Overall Submission
§ All students reported on preliminary should also be reported on final. New critical edit on final. This is at the course level in COURSES_TAKEN, Preliminary File Flag (01105). We will implement this and take exceptions. We will re-address if there are too many exceptions.

Discussion on students that get a full refund after the 28th day of class. Reported on preliminary, but not on final. FOLLOW-UP: fully refunded students ARE ELIGIBLE FOR FUNDING.

All students admitted to a doctoral program and seeking a doctoral degree will earn grad II hours for all of their graduate credit hours. This is regardless of the old 36 hours limit? Anyone (specialists and engineers) that were receiving grad II hours before will continue to receive them. Only specialists in fields in which the university offers a doctorate are eligible for grad II. This applies to all research and professional doctorates.

The universities would like a pre- and a post list for the changes?
IRM will run for Fall 2009 Final.

Charlene would like to thank all of those present for the wonderful send off. Nance Guilmartin author of “The Power of Pause” was the speaker for lunch.

§ If you weren’t a profile admit at time of admission, how is it possible that a student is a profile admit on SIF?
These are errors. We need a new Level 9 edit on final.
Need to be fixed or just leave as is?
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Do we need more categories to capture the admission_exception reason?

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</thead>
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<td>UWF</td>
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</tr>
<tr>
<td>Grand Total</td>
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</tr>
</tbody>
</table>

§ SREB wants the attempted credit hours at time of degree awarded. Suggestion: Calculate from SIF Enrollments records by summing Current Term Course Load (01063) for their undergraduate records. “This excludes courses being audited, all credits awarded during the term through "Credit by Examination" and/or CLEP. Students completing prior term incompletes should not be included on the the file unless they have registered and paid fees for the credits they are completing.”

We can run this and submit it to the universities for validation.

Do Dropped/Withdrawn count? Yes

§ Enrollment records for Financial Aid purposes only should not be included in the SIF file as well. Prior instructions were to give us these enrollment records with SIF but we’ve changed our minds.

Who are these students?
  o Study abroad
  o all college prep
  o withdrawn for medical reasons.

§ Should fee waiver, fellowship, and stipend amounts be summed into a single record for each fee waiver type, and/or by student?

Yes. Remove sequence number from submission table so that this will duplicate records will cause unique key violation on load. **NEED TO ADD BUDGET ENTITY TO UNIQUE KEY**

§ New edit?: Is it possible for a student to have zero courses_taken records if they have any of the following: Fee waive, Fellowships, Stipends, Test_Creds?

Medical students can have waivers, but no courses included. Some GAs can take one semester off and still get a stipend. Test_credits – should not happen.

Create edit for Test_Credits and Fee_Waivers

§ Can we remove the stipends, fellowships, test_credits, admission_exceptions tables from the SIFP submission?
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Remove all,
Stipends, etc. can be removed from SIFP submission.
One school needs admission_exceptions to determine fundable flag but once determined,
they do not need to send us the table.

ENROLLMENTS
§ How should STU_ENTRY_TYP be coded on students that transfer from a community
college that offers a Baccalaureate degree?
No special coding needed
§ Change name to Florida College System Transfer for J code.
§ Add codes to Termination Code (01071) to explain withdrawal (active military, medical
withdrawal, any reason that the excess hour fees would be waived) – didn’t have any
discussion on this one…
   Withdrawal for call to active duty, medical or personal hardship
   Active duty personnel
§ For courses
   Graduate credit attempted as part of a 3+2 bachelor’s/master’s degree
   Repeated courses where the student has paid the full cost of instruction
   Articulated acceleration mechanism credits
   Internship credits
   Credit hours required for certification, recertification of certificate programs.
   Courses needed to achieve a second major or degree
   Remedial and English as a Second Language credit hours
   Foreign language courses used to meet admission requirements
   Military science course that are part of ROTC
§ Add code to Current Visa Type (01816) I-130 causing 5% Tolerance exceeded for
Diagnostic Code 5275 – missing VISA_TYP when RACE_ETHNICITY = O
§ Degree Highest Level Held and Date: For summer SIF and ADM, if an entering
student for the May term will not get their high school degree awarded until June (one month
after the beginning of the term), report highest degree held as high school and the June date
as the time frame. We will keep it from being a level ‘9’ error because it is greater than the
term date.
§ New field for Verified Military Status: See ADM – Applicants_Admits table for details:
NOTE: this field is verified by the university when submitted on SIF – more discussion
needed to determine how the data are verified and what to do with active duty students.
Department of Defense may not allow us to use their data to identify this info. Code ‘A’
(Active Duty Personnel) should only be coded if the university has a way to independently
verify this status.
Active Duty: Do not report to the Veteran’s office even when receiving aid.
We have active duty people that are taken out of GRS cohorts. We will see if we can get the
agreement with DOD amended? We can only get use of this data if the information is for
accountability. I have not found a way to make that work.
New field for Veteran’s Benefits Chapter submitted on SIF – Veteran’s office at each institution is the authority on the chapter.

**Veteran’s Benefits Chapter (02060) Enrollments Table**

**Definition:** Identification of the chapter of the Civil Code under which a veteran is receiving educational benefits.

**Table Values:**
- 30 Montgomery GI Bill—Active Duty
- 31 Vocational Rehabilitation
- 32 Post-Vietnam Era Veterans’ Educational Assistance Program
- 33 Post-9/11 GI Bill
- 35 Survivors’ and Dependents’ Educational Assistance
- 00 Other
  - Not applicable

**ADMISSION_EXCEPTIONS**

§ Change this table to Required rather than As Needed.

§ The only admission exception records sent with the SIF submission are the ones for FTIC Profile Admit. Do we still need to collect this info? YES. If so, do we only need it for FTIC’s? If so do we only need it the first time they enroll. Admission Exception records must be included for all SIF submissions throughout the student’s career. Will provide a report of the number of times the admissions_exception record is being dropped.

**FEE_WAIVERS**

§ Currently differential waivers counts are collected in a data request summary report. Would you prefer that this continue, or give us a waiver record with a type of “differential waiver”?

Differential Tuition waivers – Not added.

§ New code for Public School Classroom Teacher – Each university board of trustees may waive tuition and fees for a classroom teacher who is employed full-time by a school district and who meets the academic requirements established by the university for up to six credit hours per term on a space-available basis in undergraduate courses (special education, mathematics or science) approved by the Department of Education. The waiver may not be used for courses scheduled during the school district’s regular school day.

**Question re: Fellows – where all is paid.**

§ New code for Waivers paid from grants?

This was USF’s question regarding whether or not fellows were included if they were paid form C&G funds. The answer was yes and USF is very happy.

§ Gubernatorial Waivers – we already have code for in-state (#I) and out-of-state (#O).

**All we needed was a definition.** Can we use UF’s: “The Gubernatorial Fellows Program Waiver is open to any student attending a Florida University both public and private. There are a total of 12 selected each year. We waive up to 12 hours each semester for a total of 24 hours and these hours can be taken either at UF or locally in Tallahassee.”

**COURSES_TAKEN**
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§ There will be a new edit to validate the Campus Code and the County. This may be a problem for UF (Marie).

One campus can cross counties.

**Validate County based on site instead? May be OK.**

§ The maximum of 5 hours of Supervised Teaching/Research is being edited incorrectly. Teaching and research are separate issues and should be judged independently. We will fix the edit and get it out there as soon as possible.

- Correction to Diagnostic 5261: Student Section Funding Flag must equal 7 when Maximum Credit in Supervised Teaching is Y, Primary Course Section Type is S or R, and Termination Code is not F or C
- New Diagnostic xxxx: Student Section Funding Flag must equal 7 when Maximum Credit in Supervised Research is Y, Primary Course Section Type is R, and Termination Code is not F or C

§ System Generated Instructional_Activity Columns: Summary stats from matching enrollment info (GENINSTACT) – Can we get Campus_Cd added to this report?

- Since campus_cd is on the courses_taken table and there are multiple courses per IAF row, what do you do if the campus_cd is not the same on every matching courses_taken row? If the answer is that the campus_cd SHOULD always be the same then we need to add a level 9 edit. Even with the edit we would still need to handle the possibility of multiple campus_cds because, as you know, it WILL happen unless we make the edit a level ‘X’ error.
- We could edit on the SIF courses like we did for the course summary report on budget entity, primary course section type and campus. **Yes, do this.**

It would not work unless multiple campuses can be added. UCF has multiple campuses for one course section. They can just pick the first one though.

§ Exclude Medical Courses and UF dummy courses identified by CRS_SECTIONs that begin with a ‘D’ from Diagnostic 5299: The COURSES_TAKEN table and the INSTRUCTIONAL_ACTIVITY table must match based on the following criteria: CRS_PREFIX, CRS_NBR, CRS_IND, CRS_SECTN_NBR, CRS_SECTN_TYP_PRI, CIP_CRS, and BE_CD (and maybe campus). **IRM to discuss dummy courses with UF.**

§ New Element: University Differential Tuition Flag (02057)

<table>
<thead>
<tr>
<th>University Differential Tuition Flag (02057)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Courses_Taken and Courses_to_Degree Tables</td>
</tr>
<tr>
<td>Definition: Indicator that a course differential tuition was assessed for this course at the reporting institution.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Table Values:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Y Yes Surcharge was assessed</td>
</tr>
<tr>
<td>N No Surcharge was not assessed</td>
</tr>
<tr>
<td>. Does not apply (for courses taken prior to Summer 2010 term)</td>
</tr>
</tbody>
</table>

**DIFFERENTIAL ISSUES**

§ We had question about whether we wanted the charge or the payment. It could be charged and then waived.
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§ Differential depends on student, but applies to courses and campuses.
§ Collect Assessed – if the student could be charged this fee.
§ What is the purpose. This is to get an estimate of budget authority.
§ If you don’t know what you are charging, what good is it?
§ Change wording to state course differential…DONE
§ Wording needs to be clearer. Not really differential.
§ Terminology issues when discussing internally. Differential vs program type charges
§ Can we determine student status based on student characteristics?
Ramon – We need to capture information at both course and student levels.

We need to review and get back.

New Element: Excess Hours Surcharge Flag (02058) – for courses offered on or after May 2010 (note: implementation needed now to accommodate term submissions though most institutions won’t need to populate the field until next year’s annual submission for 2010-2011).

**Excess Hours Surcharge Flag** (02058)
Courses_Taken and Courses_to_Degree Tables
Definition: Indicator that an excess hours surcharge was assessed for this course.

Table Values:
- Y Yes Surcharge was assessed
- N No Surcharge was not assessed
- . Does not apply (for courses taken prior to Summer 2010 term)

**COURSE_MEETINGS**
§ Null Days of Class Meetings (Sunday through Saturday) for unscheduled classes.

UNF – SIFP – would like to submit course meetings with SIFP to correct an internal problem.
It can be run through beta to get edit errors and frequencies.

**INSTRUCTIONAL_ACTIVITY**
Exclude Medical Courses from Diagnostic 5305: The COURSES_TAKEN table and the INSTRUCTIONAL_ACTIVITY table must match based on the following criteria:
CRS_PREFIX, CRS_NBR, CRS_IND, CRS_SECTN_NBR, CRS_SECTN_TYP_PRI, CIP_CRS, and BE_CD (and maybe campus).

§ Distance Learning Elements
- Instructional Delivery Method (02052-New Element)
Because of blackboard, FAU will never use “T – Traditional”
**Could the definition of TE code be improved? This is the definition in Florida Distance Learning Task Force Final Report 2/26/2009, http://www.fldlc.org/taskforce/ .**

**Instructional Delivery Method** (02052-New Element)
Definition: A classification of a course based on the delivery of direct instruction.
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Coding Instructions:
All courses will be classified with an instructional delivery indicator as defined in statute FS 1004.091.

Table Values:
T Traditional - 100% face to face instruction with no technology used.

TE Technology Enhanced
Primarily face to face instruction utilizing some form of technology for delivery of supplemental course materials and no more than 49% of direct instruction.

HB Hybrid Blend
50-79% of the direct instruction of the course is delivered using some form of technology when the student and instructor are separated by time, space or both.

DL Distance Learning
80% or more of the direct instruction of the course is delivered using some form of technology when the student and instructor are separated by time, space or both.

Distance Learning Fee Charged (01416)

Definition: An indicator denoting that a Distance Learning Course Fee was assessed for this course section. A 'Y' shall be used to denote a fee was charged, a period (.) shall be used to indicate that a distance learning course fee was not charged.

Criteria:
1) A distance learning course fee cannot be charged unless 80% of the direct instruction for the course is delivered using some form of technology when the student and instructor are separated by time, space or both and
2) the course section was/is listed in the Florida Higher Education Distance Learning Catalog pursuant to Florida Statutes 1004.09, 1004.24 (17)(a).

Coding Instructions:
Placing a Y in this element indicates that both of the criteria given above have been met. Additionally, placing a Y in this element will require that the corresponding Technology Delivery Indicator will not have an N in TECH_IND_PRIMARY and that the Instructional Delivery Method is coded as DL (Distance Learning)

Table Values:
Y Yes Distance Learning Fee was Charged
. Distance Learning Fee was not charged
**Technology Delivery Indicator – Primary, Secondary, Tertiary** (02030, 02031, 02032)

**Description:** The type of technology used by the instructor for course delivery.

**Coding Instructions:**
Code the primary method of delivery using technology associated with this course section. A maximum of three indicators will be used for coding. If the course has both a technology and a face-to-face component, the delivery method associated with the majority of the instructional time should be coded in TECH_IND_PRIMARY (for “HB” and “DL” Delivery Method).
If technology is only a supplemental tool for this course then code "N - none" in TECH_IND_PRIMARY and use TECH_IND_SECONDARY and TECH_IND_TERTIARY to indicate any supplemental use of technology.

**Table Values:**

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>M</td>
<td>Materials – Primarily print-based materials for checkout or mail out which may be packaged with other materials including Videotapes, CD-ROM, DVD. Correspondence courses fall into this category.</td>
</tr>
<tr>
<td>B</td>
<td>Course delivered by open air broadcast, fed by satellite, or delivered by cable TV, EBS, microwave or radio that is synchronous or live. Transmission is one way. Telephone, web or email used simply for interactivity does not change this indicator to web based.</td>
</tr>
<tr>
<td>C</td>
<td>Conferencing, Compressed Video, Audio, ITV – TWO way audio synchronous delivery that is interactive between two or more locations. This does NOT included Web conferencing.</td>
</tr>
<tr>
<td>P</td>
<td>Mobile or portable devices. Course delivery over PDA’s MP3 players, digital video players, handheld gaming units, mobile telephones or any other “personal mobile device.”</td>
</tr>
<tr>
<td>W</td>
<td>Web-Based or Internet Based – Course Delivery via the Internet, via WEB TV, video streaming on a PC, or any other internet based technology heretofore not yet developed or thought of.</td>
</tr>
<tr>
<td>N</td>
<td>None (no technology employed in the delivery of instruction)</td>
</tr>
</tbody>
</table>

**HTD COURSES_TO_DEGREE**

§ New Element: University Differential Tuition Flag (02057) – See SIF/SIFP Courses_Taken table

§ New Element: Excess Hours Surcharge Flag (02058) – See SIF/SIFP Courses_Taken table
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UF – Why is Excess Hours Charge flag also on HTD? UF does not provide repeat charges on file. So, don’t add Excess Hours charge.
We will consider the options. Can we update from the courses_taken table?

DEGREES_AWARDED
§ Discovered after workshop: Diagnostic 5208 will not allow dot in CIP_DEGREE on the HTD submission.

Reports
§ Modify the “Student Excess Hours Degree - Discipline Detail Report" to break on term rather than annually.

Why is differential flag included? Same as excess hours flag.

SFA
Overall Submission
§ Is anyone running the new veteran’s payment through their financial aid office? If so (and someone is), do we want them on the financial aid tables since they are an entitlement, not aid? NO.
§ Some universities manage student work and fee waivers through their financial aid office. These are ignored (except for federal work study) for system wide reporting as not all are included. Do we want to continue to collect them if not everyone is handling them this way?

Question: For unmet need. If waivers are not reported, then unmet need is incorrect. Answer: We do not recalculate unmet need. We accept what you report based on your calculations.

We will remove codes 009 (Grants-Tuition Waivers) and 305 (Work Study – Institutionally Funded) from the list of valid values for 2010-2011)

§ Continue to report an SFA record for every student receiving a financial aid award and for every student with an official ISIR, regardless of whether that student receives a financial aid award.
§ For students not enrolled but who are receiving aid, submit Fee_Class_Kind = ‘I’ and as much information as possible.
Fee_Class_Kind = I – don’t do; We will get back with everyone.
§ Students who withdraw after the 28th day of class should be on the SIFP and final SIF whether or not they receive a full refund.
§ We will continue to accept level 9 errors, with an explanation with the file submission, if there are students in the institution’s SFA for whom it is not possible to send an enrollment record (e.g., consortium agreements, withdrawals, transients).

Which of these would cause problems if they took effect in the fall 2010 reporting of the 2009-10 SFA file? The Financial Aid Directors did not raise any objections when asked.
Florida Higher Education Summit
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§ Drop: Source of Funds (01255)
Is this needed for Annual Report? Financial Aid report that is an annual request provides the information that is needed.
Source of Funding helps clarify program code selection. We will discuss and return.
Data Administrators were copied on the discussion with Financial Aid Directors.

§ Change:

Financial Aid Award Condition I.D. (01254)
Financial_Aid_Awards
Definition: A code to identify the condition for which the student received the financial aid award.
Table Values:

<table>
<thead>
<tr>
<th></th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>N</td>
<td>NEED-BASED</td>
</tr>
<tr>
<td></td>
<td>any award that requires a demonstration of financial need for eligibility; include awards that have both need-based and non-need-based criteria</td>
</tr>
<tr>
<td>A</td>
<td>NON-NEED-BASED</td>
</tr>
<tr>
<td></td>
<td>any award that does not require demonstration of financial need for eligibility</td>
</tr>
</tbody>
</table>

Question specific to this element change:
§ With regard to the Award Condition ID (01254), are there Financial Aid Program Identifier (01253) fields that we can always code either Need or Not-Need. If so, we can edit for validity. For example, Pell (code 001) is always need based. What are the others that can be included in an edit?
Yes for some but not for institutional and private awards. We can write edit for the ones that are always one or the other.

Do not report zeros if the data is missing. Zeros mean “no income,” and missing values (".") mean nothing was reported for that field.

Do not report all 9’s for missing values. For all numeric monetary columns, if the column contains all 9’s, they will have to be explained.

Expected Family Contribution (01250) / FTI:FISAP Total Income (01249)
§ If Dependency Status (01248) is missing, must be coded as unknown (dot).
§ Required when Dependency Status (01248) is not missing

Financial Aid Need (01251)
§ If Dependency Status (01248) is missing, must be coded as unknown (dot).
§ Required when Dependency Status (01248) is not missing
§ If the institution generates negative value for Financial Aid Need (01251), convert the value to “0”

Parents’ Adjusted Gross Income (02048)
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§ If Dependency Status (01248) is not 'D', must be coded as unknown (dot).
§ Required when Dependency Status (01248) equal “D – Dependent"
§ If a negative, convert the value to “0”
Student's Adjusted Gross Income (02047)
§ If Dependency Status (01248) is missing, must be coded as unknown (dot).
§ Required when Dependency Status (01248) is not missing
§ If a negative, convert the value to “0”

TEF

Peg Bonyata, Assistant Director, IRM, the Board presented information. See workshop handout for new table layout http://www.flbofg.org/resources/FHES10/_doc/Data-Workshop-Agenda-2010.pdf

Noted that most were OK with the format change, but had concerns about the two new requirements: completion of coursework and completion of fieldwork/internship.

There will be a Data Administrator's conference call on July 13, 2010 to address these issues and establish a time for the data providers of TEF to meet.