

## "Requires Review" Category on the IPEDS Cognos Reports

**Summary:** To resolve most issues causing a “requires review” status:

- 1) If the employee has an SOC of 25-1xxx, check the activity percentages
- 2) If there is no assigned effort record, create one with an effective date of November 1 or earlier of the IPEDS reporting year.
- 3) Check the Tenure Data record – it must exist and must have an effective date, rank change date, and tenure status date all November 1 or earlier of the IPEDS reporting year.

**READ THE REST OF THIS DOCUMENT FOR FURTHER EXPLANATION**

### I. Background

In IPEDS reports, employees are first grouped into **Instructional** and **Non-Instructional Staff**. These designations are based on an employee’s activity percent distribution (aka Funding and Effort or Assigned Effort).

**Instructional Staff**-An occupational category that is comprised of staff who are either: 1) Primarily Instruction or 2) Instruction combined with research and/or public service. The intent of the Instructional Staff category is to include all individuals whose primary occupation includes instruction at the institution.

- Instruction:  $\text{actual\_activity\_academic\_pct} > 50$
- Instruction/Research/Public Service:  
 $(\text{actual\_activity\_academic\_pct} + \text{actual\_activity\_research\_pct} + \text{actual\_activity\_pub\_svc\_pct}) \geq 50$   
AND  $\text{actual\_activity\_research\_pct} \leq 50$   
AND  $\text{actual\_activity\_pub\_svc\_pct} \leq 50$

#### **Non-Instructional Staff Group 1**

- Research:  $\text{actual\_activity\_research\_pct} > 50$
- Public Service:  $\text{actual\_activity\_pub\_svc\_pct} > 50$

#### **Non-Instructional Staff Group 2**

- Individuals not meeting any of the above criteria.

IPEDS further requests that **Non-Instructional Staff Group 2** are broken down into Bureau of Labor Standard Occupational Categories (SOC). This is done by translating BCAT to SOC using the crosswalk: [https://www.usg.edu/research/assets/research/documents/BCAT\\_Crosswalk\\_03222021.pdf](https://www.usg.edu/research/assets/research/documents/BCAT_Crosswalk_03222021.pdf)

### II. Requires Review

In Cognos IPEDS HR Validation Reports Parts B, D, E, G and H, you may see a “fake” occupational category called “Requires Review”. Employees in this category do not fit any “true” IPEDS SOC due to a conflict in the data between their SOC category and their activity percent distributions.

Specifically, employees with an SOC of 25-1xxx **MUST** have activity percent distributions meeting the criteria of **Instructional Staff** or **Non-Instructional Staff Group 1**.

The “Requires Review” category is provided in the Cognos IPEDS HR Validation Reports as an alert/diagnostic aid for institutions. If SOC category or activity percent distributions are not corrected or modified, **these employees will not be included in the IPEDS upload survey.**

The table below shows a sample of an IPEDS HR Cognos Report that contains “Requires Review”:

IPEDS HR 2020							
Part B2 - Number of full-time non-instructional staff							
by tenure status, medical school status and occupational category							
Medical Status	Occupational Category	Tenured	On Tenure Track	Not on Tenure Track Multi-Year Contract	Not on Tenure Track Annual Contract	Not on Tenure Track Less-than-annual contract	Without Faculty Status
Non-Medical	Postsecondary Teachers - Research	3	2	0	0	0	0
	Librarians	0	0	0	1	0	1
	Other Teaching and Instructional Support Occupations	0	0	0	1	0	112
	Management Occupations	13	3	0	2	0	63
	Business and Financial Operations Occupations	0	0	0	0	0	22
	Computer, Engineering, and Science Occupations	0	0	0	0	0	49
	Community Service, Legal, Arts, and Media Occupations	0	0	0	0	0	10
	Healthcare Practitioners and Technical Occupations	0	0	0	0	0	2
	Service Occupations	0	0	0	0	0	104
	Office and Administrative Support Occupations	0	0	0	0	0	87
	Natural Resources, Construction, and Maintenance Occupations	0	0	0	0	0	13
	<b>Requires Review</b>	4	11	0	3	0	7
<b>Non-Medical - Summary</b>		20	16	0	7	0	470
<b>Overall - Summary</b>		20	16	0	7	0	470

In any of the cells where a number appears in the “Requires Review” column, you can drill down to the individual employee detail records which will show the data in conflict. Below are the relevant data for all the records flagged as “Requires Review” in the report above:

FULL TIME EMPLOYMENT IND	ACTUAL ACTIVITY ACADEMIC PCT	ACTUAL ACTIVITY RESEARCH PCT	ACTUAL ACTIVITY PUB SVC PCT	ACTUAL ACTIVITY ADMIN PCT	JOB CODE	JOB TITLE	SOC OCCUPATIONAL CATEGORY
Y	0	0	0	0	202X00	Assistant Professor	Postsecondary Teachers
Y	0	0	0	0	201X00	Associate Professor	Postsecondary Teachers
Y	0	0	0	0	202X00	Assistant Professor	Postsecondary Teachers
Y	0	0	0	0	202X00	Assistant Professor	Postsecondary Teachers
Y	0	0	0	100	201X00	Associate Professor	Postsecondary Teachers
Y	0	0	0	100	200X00	Professor	Postsecondary Teachers
Y	0	0	0	0	202X00	Assistant Professor	Postsecondary Teachers
Y	0	0	0	0	202X00	Assistant Professor	Postsecondary Teachers
Y					202X00	Assistant Professor	Postsecondary Teachers
Y	0	0	0	0	201X00	Associate Professor	Postsecondary Teachers
Y					932X00	Temporary Faculty	Postsecondary Teachers
Y					932X00	Temporary Faculty	Postsecondary Teachers
Y	0	0	0	100	202X00	Assistant Professor	Postsecondary Teachers
Y					932X00	Temporary Faculty	Postsecondary Teachers
Y	0	0	0	0	203X00	Instructor	Postsecondary Teachers
Y	0	0	0	0	202X00	Assistant Professor	Postsecondary Teachers
Y	0	0	0	0	202X00	Assistant Professor	Postsecondary Teachers
Y	0	0	0	0	203X00	Instructor	Postsecondary Teachers
Y	0	0	0	0	202X00	Assistant Professor	Postsecondary Teachers
Y	0	0	0	0	202X00	Assistant Professor	Postsecondary Teachers
Y	0	0	0	0	202X00	Assistant Professor	Postsecondary Teachers
Y	0	0	0	0	202X00	Assistant Professor	Postsecondary Teachers
Y	0	0	0	0	202X00	Assistant Professor	Postsecondary Teachers
Y	0	0	0	0	204X00	Lecturer	Postsecondary Teachers
Y	0	0	0	0	200X00	Professor	Postsecondary Teachers

These “Requires Review” employees have an SOC code of 25-1xxx but their activity percent distribution does not fit the definition of [Instructional Staff](#) or [Non-Instructional Staff Group 1](#) because:

1. The activity percent is more than 50 percent administrative.
2. The activity percent fields are all zero, and/or the 4 fields don't equal to 100%
3. All fields are null.
  - Either there is no Tenure Data record in OneUSG or no Assigned Effort record in OneUSG for the employee.
  - The source for the activity percent fields is the Assigned Effort record, but **this data will not be extracted at all into HRDM if there is not a corresponding Tenure Data record for the employee.**
  - In order for an employee to be included, they must have **both a Tenure Data** record and an **Assigned Effort record** in OneUSG.
    - The **effective date, the rank change date and the tenure status date** on the Tenure Data record must **ALL** be less than or equal to the November 1 fall census date.

### III. Resolving the “Requires Review” Errors

Options:

1. If appropriate, change the employee’s Job Code to something other than SOC 25-1xxx
2. If appropriate, change the activity percent distributions so they align with [Instructional Staff](#) or [Non-Instructional Staff Group 1](#).
  - If there is no assigned effort record, create one with an effective date that is less than or equal to November 1 of the IPEDS reporting year.
  - Check **to make sure there exists a corresponding Tenure Data record.** If not, then create one with the effective date, rank change date, and tenure status date all November 1 or earlier of the IPEDS reporting year.

## OneUSG Guidance for Option 1 – Changing the Job Code:

Use the following Navigation to locate the Employee Position number:

*Workforce Administration>Job Information>Job Data*

Enter the Empl ID and select search. The Position Number is located on the first panel: Work Location.

The screenshot shows a 'Work Location' form with various fields and navigation options. At the top right, there are 'Find', 'First', '1 of 1', and 'Last' buttons, along with a 'Go To Row' button and '+' and '-' icons. The form contains several sections:

- Effective Date:** 08/01/2019
- Effective Sequence:** 0
- HR Status:** Active
- Payroll Status:** Active
- \*Action:** Pay Rate Change
- Reason:** Merit
- \*Job Indicator:** Primary Job
- Company:** 090 Georgia State University
- Position Number:** 10020513 (highlighted in yellow)
- Position Entry Date:** 08/01/2018
- Regulatory Region:** USA United States
- Business Unit:** 09000 Georgia State University
- Department:** 113200000 Psychology
- Department Entry Date:** 08/01/2018
- Location:** 090 Georgia State University
- Establishment ID:** 090 Georgia State University
- Date Created:** 06/29/2019
- Last Start Date:** 08/01/2018
- Expected Job End Date:** (empty)

At the bottom, there are four tabs: 'Job Data', 'Employment Data', 'Earnings Distribution', and 'Benefits Program Participation'.

Use the following Navigation to access the Position Data:

*Organizational Development>Position Management>Maintain Positions/Budgets>Add/Update Position Info*

Enter the Position Number into the search field and select Search.

### Position Data

Enter any information you have and click Search. Leave fields blank for a list of all values.

The screenshot shows the 'Position Data' search criteria form. At the top, there are two buttons: 'Find an Existing Value' and 'Add a New Value'. Below them is a 'Search Criteria' section with a dropdown arrow. The search criteria include:

- Position Number:** begins with 10020513 (highlighted in yellow)
- Long Description:** begins with
- Position Status:** =
- Business Unit:** begins with
- Department:** begins with
- Job Code:** begins with
- Reports To Position Number:** begins with

At the bottom, there are three checkboxes: 'Include History', 'Correct History', and 'Case Sensitive'.

The Jobcode is located on the Description panel.

Description | Specific Information | Budget and Incumbents

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**Position Information** Find | View All | First | 1 of 1 | Last

Position Number 10020513 + -

Headcount Status Filled Current Head Count 1 out of 1

\*Effective Date 08/01/2018 \*Status Active

Reason MGR Reports to Update Action Date 08/10/2018

\*Position Status Approved Status Date 08/17/1998  Key Position

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**Job Information**

\*Business Unit 09000 Georgia State University

**Job Code 202X03** Assistant Professor

\*Reg/Temp Regular \*Regular Shift Not Applicable \*Full/Part Time Full-Time

Official Title Asst Professor Union Code

[Detailed Position Description](#)

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**Work Location**

\*Reg Region USA United States

Department 113200000 Psychology Company 090 Georgia State University

Location 090 Georgia State University

Reports To 10021396 Chair Dot-Line

Supervisor Lvl Security Clearance

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**Salary Plan Information**

Salary Admin Plan 09N Grade 000 Step

Standard Hours 40.00 Work Period W Weekly

Mon	Tue	Wed	Thu	Fri	Sat	Sun
8.00	8.00	8.00	8.00	8.00		

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**Paygroup Information**

\*Pay Group 09F Academic Year Faculty Legacy Position Number 09000252

\*Employee Type S Salaried Appointment Class

Budget Amount 60477.000

USA

## OneUSG Guidance for Option 2 – Changing the Activity Percent distribution:

Use the following navigation to update the Activity percent fields, be sure to check the effective date:

*Workforce development > Faculty Events > Track Events > Assigned Effort*

Tenure/Home Dept 5101080 Reade Hall  
Academic Rank

Empl ID [Redacted]  
Annual Rate 8400.000  
Tenure Status

Company 510 Valdosta State University

**Assigned Effort** Find | View All First 1 of 1 Last

\*Effective Date 11/12/2019 EFT 1.000

**Salary %**

- State Salary
- Sponsored Salary
- Contract Salary

**Activity %**

- Instruction Activity 100
- Administrative Activity
- Research Activity
- Service Activity
- Clinical Activity

Nov. 1 or earlier of collection year

Save Return to Search Notify Update/Display Include History Correct History