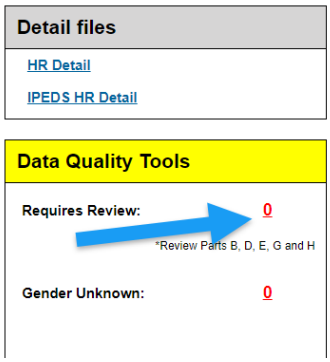
"Requires Review" Category on the IPEDS Cognos Reports

Summary: To identify and resolve most issues causing a "requires review" status:
Look in the Cognos report detail file of the requires review records to answer the following questions:

1) IN COGNOS: Is the tenure field blank?
    a. RESOLVE IN ONEUSG: 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.
2) IN COGNOS: Is the administrative activity percentage 50% or more? Do the activity percentages not add up to 100%?
    a. RESOLVE IN ONEUSG: correct the activity percentages, check the effective dates as well (must be Nov. 1, 2026 or earlier).
3) IN COGNOS: Are the activity percentage fields blank?
    a. RESOLVE IN ONEUSG: If there is no assigned effort record, create one with an effective date of November 1 or earlier of the IPEDS reporting year. If there is an assigned effort record, check the effective date.



To look at all employees in the 'requires review' category, there is a 'Requires Review' report. This is located with the other data quality tools in Cognos (see screenshot to the left).

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: actual_activity_academic_pct > 50
- Instruction/Research/Public Service:
  (actual_activity_academic_pct + actual_activity_research_pct + actual_activity_pub_svc_pct) >= 50
  AND actual_activity_research_pct <= 50
  AND actual_activity_pub_svc_pct <= 50

Non-Instructional Staff Group 1

- Research: actual_activity_research_pct > 50
- Public Service: 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_SOC_Crosswalk.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":

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
	Requires Review	4	11	0	3	0	7
Non-Medical - Summary		**20**	**16**	**0**	**7**	**0**	**470**
Overall - Summary		**20**	**16**	**0**	**7**	**0**	**470**

In any of the cells where a number appears in the "Requires Review" column/row, you can drill down to the individual employee detail records by clicking on the number.

III. Identify the Likely Cause of "Requires Review" Errors

Use the Cognos detail reports to see what the system is importing, identify a likely cause of the error. Corrections are made in the source data in OneUSG. See below for examples.

	TENURE_STATUS_DESC	SOC_CODE	SOC_DESC	ACTUAL_ACTIVITY_ ACADEMIC_PCT	ACTUAL_ACTIVITY_ RESEARCH_PCT	ACTUAL_ACTIVITY_ PUB_SVC_PCT	ACTUAL_ACTIVITY_ ADMIN_PCT
1		25-1000	Postsecondary Teachers				
2	Tenured	25-1000	Postsecondary Teachers				
3	Other	25-1000	Postsecondary Teachers	0	0	0	100
4	Other	25-1000	Postsecondary Teachers	25	5	10	60

1. In the row labeled with a purple 1 in the table above: the tenure description and activity percentages are <u>all</u> blank.
    - 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 activity percentages will <u>not</u> be extracted into the HRDM if there is not a corresponding Tenure Data record for the employee.
    - 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.
2. In the row labeled with a purple 2 in the table above: the assigned effort percentages are blank.
    - It is likely that the Assigned Effort page is missing or has an incorrect date.
3. In the rows labeled with a purple 3 and 4: the administrative activity percent is greater than or equal to 50%
    - Activity percentages need to be adjusted so that administrative activity is less than 50%.
4. Not shown: The activity percent fields are all zero, and/or the 4 fields don't add to 100%
    - Activity percentages need to be corrected to add to 100%

IV. General Guidance for Resolving Common "Requires Review" Errors in OneUSG

1. **Tenure Status**: If a person is in a job code that translates to an SOC of 25-1xxx, they must have an MFE record and a tenure status and rank status. Rank and tenure are REQUIRED for all instructional staff.

   Detailed instructions on how to update tenure status can be found here: https://usg.service-now.com/usgsp
   In Knowledge Article USGKB0011689

   Reminder:
   - Be sure to check effective dates. If you make changes, the default date will be the date of entry, which will be after November 1, and thus will not be extracted and will not resolve the error.

2. **Activity Percent Distributions**: Correct the activity percent distributions so they align with Instructional Staff or Non-Instructional Staff Group 1.
   Reminders:
   - 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.
   - 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.

Changing the Activity Percentage:
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

