



# IPEDS Tutorial for New Keyholders



## Section 1 - Introduction

### Slide 1

The National Center for Education Statistics, NCES, and The Association for Institutional Research, AIR, welcome you to the IPEDS tutorial for New Keyholders.

### Slide 2

The topics covered by the tutorial include

- an overview of IPEDS
- the 2009-10 Data Collection Schedule
- a discussion of Keyholder responsibilities
- use of the IPEDS data collection system to enter, edit, and lock data
- and where to go to find help

### Slide 3

First, please note that some of the survey screens shown in this tutorial are from a previous data collection and are meant to be an example of how the data collection system works, not a representation of any of the current surveys. For the current screens, please see the survey materials that are available as well as the Step-by-Step survey tutorials.

### Slide 4

IPEDS is the Integrated Postsecondary Education Data System.

IPEDS is a single, comprehensive system designed to collect information from all types of postsecondary institutions.

IPEDS is built around a series of interrelated survey components that collect institutional data on student charges, enrollments, program completions, faculty, staff, and finances.

### Slide 5

The nine survey components in IPEDS fall into three categories:

- general information
- student information, and
- resource information.

General information is obtained through the Institutional Characteristics Survey.

Student information is acquired through six surveys:

- Completions

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- 12-month Enrollment
  - Fall Enrollment
  - Student Financial Aid
  - Graduation Rates, and
  - 200% Graduation Rates

Resource information is collected in the Finance and Human Resources surveys.

### Slide 6

IPEDS data are available to the public in many ways. One of the most well-known of these is the College Navigator website, which was designed for students, guidance counselors, and parents to get more information to use when making decisions about which college to attend, but which is actually used by a much larger audience. IPEDS data are also available through the IPEDS Data Center, Data Analysis System, and Tables Library, and are used by policymakers, researchers, other institutions, the media, and state and local agencies, to name a few.

As an IPEDS keyholder, the accuracy and quality of your institution's data depend on you.

### Slide 7

Every institution that has a Program Participation Agreement with the U.S. Department of Education to participate in federal student financial aid programs authorized by Title IV of the 1965 Higher Education Act must complete all applicable IPEDS surveys.

Institutions are expected to do so accurately and on schedule.

This obligation is stated in the Higher Education Act, which reads in part: "...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."

### Slide 8

Each year, NCES is required to provide the Office of Federal Student Aid with a list of institutions that do not submit IPEDS Reports.

FSA then sends out fine letters and warnings to noncompliant institutions.

Penalties for not submitting IPEDS Reports can result in fines as high as \$27,500 per occurrence, or loss of the institution's Title IV eligibility.

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## Section 2 - Data Collection Schedule

### Slide 9

All Keyholders must register at the beginning of every data collection cycle.

For the 2009-10 data collection, registration opened on August 5<sup>th</sup>. UserIDs and passwords for the upcoming data collection period were sent to all institutions.

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At this time, institution CEOs who had not yet designated Keyholders received letters containing registration information.

If, by August 26, an institution had not yet designated a Keyholder, or the old Keyholder had not registered, NCES sent a letter to the CEO requesting appointment of a new Keyholder.

NCES continues to send reminders until a Keyholder has registered.

### Slide 10

IPEDS survey components are collected in three collection periods: Fall, Winter, and Spring.

These are the three fall surveys:

- Institutional Characteristics,
- Completions, and
- 12-month Enrollment.

This year, the fall data collection period for Keyholders runs from September 2 through October 14. Coordinators have the later closing date of October 28.

There are no deadline extensions for the IPEDS surveys. All three fall surveys must be completed and locked by the Keyholder by October 14<sup>th</sup>.

The role of an IPEDS Coordinator varies from state to state and from institution to institution. Coordinators may provide data, may have access to edit data, or may only be able to view data, depending on state and system needs. Some Coordinators have an additional lock to apply after institutional Keyholders have applied their lock. And some institutions have several Coordinators, while others have no Coordinator.

### Slide 11

In the winter data collection, the Human Resources survey is the only survey that must be completed. This survey collects information on faculty and staff job classifications, and faculty rank, tenure, and salaries. A shorter version of this survey is used for non-degree-granting institutions.

For Keyholders, the winter collection runs from December 2, 2009, through January 20, 2010. For Coordinators, the closing date is February 3, 2010.

### Slide 12

The spring data collection includes the following survey components:

- Fall Enrollment,
- Finance,
- Graduation Rates,

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--200% Graduation Rates, and

--Student Financial Aid.

Beginning this year, the spring collection opens on December 2, 2009, the same date that the winter collection begins. But the spring collection surveys will stay open continuously until April 14, 2010. The spring closing date for Coordinators is April 28, 2010.

### Slide 13

NCES has a vigorous prompting schedule to make sure Keyholders do not inadvertently forget to submit their IPEDS data.

Each collection period, NCES sends the Keyholder an e-mail announcing the opening of the collection period.

If, by four weeks before deadline, no data have been entered during the collection, NCES will send an e-mail reminder to the Keyholder.

If, by two weeks before deadline, data have still not been entered, NCES will telephone the CEO and/or Keyholder.

Also, at two weeks and one week before deadline, if all surveys have not been locked, NCES will send the Keyholder e-mail reminders.

### Slide 14

NCES also continues to prompt the institution's CEO using mail and telephone, until a Keyholder registers.

Keyholders are encouraged to enter and lock their data as early as possible, to avoid the last minute rush when the system slows down and there are long waits to get through to the IPEDS Help Desk.

So NCES sends an early response e-mail thanking the CEO of institutions that lock all surveys by three weeks before the close of each collection period. NCES realizes that this is not always possible to do, but wants to acknowledge the efforts of those who are able to do it.

The e-mail refers to the Keyholder by name so the CEO knows who was responsible, and who to thank.

### Slide 15

So how can you tell if you're an IPEDS Coordinator, or an IPEDS Keyholder, in order to figure out what your reporting deadline is for IPEDS? You may be called the "IPEDS Coordinator" at your institution, but that does **not necessarily** mean that you are considered a Coordinator by IPEDS.

You can tell by looking at your UserID for the IPEDS data collection system. Keyholder UserIDs start with P9. Keyholders who report for multiple campuses have an ID that begins with 88G.

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Coordinator UserIDs start with anything else. That's how the data collection system knows when to close the system to the data reporter.

Again, there are no reporting extensions, so it is important to submit the data by the correct closing date.

### **Slide 16**

It is never a good idea to wait until the last week to enter and lock IPEDS reports.

During the last couple of weeks, the collection system gets overloaded and sluggish, and it takes much longer to enter the data. Also, the call volume to the IPEDS Help Desk increases and many calls must be put on hold.

Keyholders should get their data entered as early as possible to avoid the last week submission rush.

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## **Section 3 - Keyholder Responsibilities**

### **Slide 17**

Keyholders are the institutional representatives responsible for the submission of all applicable IPEDS surveys in the appropriate data collection period. Keyholders are appointed by the institution's Chief Executive Officer.

As an IPEDS keyholder, the accuracy and quality of your institution's data depend on you.

In submitting data, you will follow a three-step process:

First, you'll enter your institution's data into the IPEDS web-based data collection system.

Second, you'll run an edit check program against the data. This program looks for problems in the data. Then, if the edit check program notes any problems, you'll clean (meaning fix or revise) the data.

And third, you'll lock the data, which indicates that your institution is satisfied that the data that have been submitted are accurate. While others at the institution may assist in entering data, only the Keyholder can lock it. Locking the data completes the survey.

### **Slide 18**

As the Keyholder, you are the contact person for communications between IPEDS and the institution. E-mail messages and telephone calls from the Help Desk go to the Keyholder first. If they can't contact you, they'll contact your institution's CEO.

So, Keyholders are responsible for keeping their contact information in IPEDS current. You can do that through the IPEDS data collection system at any time during the year, except for June or July.

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Call or write to the IPEDS Help Desk if you wish to update your contact information during June or July.

### **Slide 19**

Keyholders are responsible for organizing the data submission at their institution. As the keyholder, you may, or may not, actually enter the data for surveys. You may obtain up to six additional passwords to be used by others at the institution for data entry and editing.

However, the Keyholder is ultimately responsible for making sure that all surveys are completed. This may mean working with other offices in the institution to make sure the data is compiled and submitted.

### **Slide 20**

Keyholders need to stay in contact with their Coordinators, whether those Coordinators are on campus or somewhere else in the state. Please be aware that your state may have additional reporting requirements or deadlines that you need to know about.

### **Slide 21**

Keyholders also call or e-mail the IPEDS Help Desk with any questions or concerns.

### **Slide 22**

The IPEDS Help Desk can assist you with specific problems in data entry, and also with general problems. Keyholders and Coordinators can call the Help Desk, for example, if

- a USER ID and start-up password have not been received
- the list of surveys seems to be incorrect, given the type of institution and which surveys were anticipated
- a survey status (such as "Locked") seems to be wrong
- if you have questions concerning any e-mail communications
- if you have problems entering data, problems resolving edit failures, or problems locking the data, or if you have any other questions

In short, the Keyholder should get questions resolved, not sit and wonder or operate on guess work. The Help Desk is there to assist you in getting your IPEDS data submitted. They're good at what they do, and they've helped thousands of keyholders.

## **Section 4 - Features of the Web-Based Data Collection System**

### **Slide 23**

NCES makes the job of data submission easier by automating some tasks. For example, IPEDS pulls totals from one survey section or component to another when the data that are being collected are from the same population, such as full-time, first-time undergraduate students.

IPEDS calculates most totals, differences, percentages, and rates automatically.

And reported values from the prior year are preloaded as a reference point.

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### Slide 24

The data collection system is password protected. Along with a UserID, Keyholders are given a start-up password. When you register, you must change the password to one of your own invention.

You can also create up to 6 additional UserIDs, each with a unique password. Additional users can enter and edit data and verify submissions, but they cannot lock the data. Only the Keyholder can lock the data. Starting this year, additional users must also register.

The Help Desk can assist with forgotten passwords.

### Slide 25

In addition to regular reminders about submission deadlines, IPEDS sends Keyholders and Coordinators e-mail notifications when surveys are locked. A separate e-mail will be sent to you for EACH survey you lock. Many keyholders keep a copy of these e-mails.

### Slide 26

The IPEDS web-based data collection system can be accessed from this URL:

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

Please note: There is also a link to the data collection system from the IPEDS Home Page, using the Data Provider Center button.

Log into the IPEDS web-based data collection system from the welcome page. Take note of the LOGIN boxes above the yellow collection description boxes.

The screen also presents important information about the data collection schedule and data submission requirements.

From the left menu on this page, you can access a lot of important information, including the collection schedule, survey materials, and a tutorial that explains how to use the Data Collection System.

The first time you log into the system, you will be required to register. Registration involves verifying or updating contact information

### Slide 27

But before you can register, you'll need to change your password. You can change the temporary password that was sent to you to something that will be easier for you to remember, but new passwords must conform to the rules cited on the screen, or they will not be accepted.

### Slide 28

The next screen is the Registration screen where your contact information is verified or updated. Press the Update button to save any changes, or to verify that all information on the screen is correct.

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Contact information can be updated at any time during the data collection by using the Tools menu, and clicking on Registration.

### Slide 29

After registering, you can request up to six additional UserIDs and passwords by clicking on the drop down Tools menu and selecting **Request Additional Users**.

This will enable multiple users to enter and edit survey data.

Note that UserIDs for additional users end in numbers greater than 1.

### Slide 30

Once the fall data collection opens, you will need to update your institution's identification before you can enter any survey data. This is done by selecting **Edit Identification** under **Options**.

### Slide 31

Review all identification information and click **Save** at the bottom of the page. Although this is done every fall, you can update this page at any time during the data collection year. This is where you can change address, telephone, and website information, and request institution name changes. Once the institution identification is complete, you will be able to access the surveys for the collection period.

### Slide 32

The navigation menu appears across the top of most screens in the data collection system. Clicking on **Surveys** in the navigation menu from any other page will return you to this screen.

The Surveys screen displays the status of all the surveys in the current collection. Below the Status heading, the number of locks that have been applied and the total number of locks that are required are displayed. When all locks have been achieved, the term **Complete** appears in the Status column.

The Steps to Locking column displays the steps that can currently be performed on the way to locking a survey. Those steps appear in sequential order:

- Enter Data
- Perform Edits
- Resolve Errors
- Lock

Once a survey is locked, the Steps to Locking column for that survey is cleared.

The Options column contains links to

- Edit the Institution Identification information
- View Data
- View the Edit Report, and
- Generate a Printable Report.

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At the top of the Surveys page is a big red question, **Am I Done?** Clicking on that link provides the answer for the current collection. When all surveys for a collection are locked, the answer will change to **Yes!**

### Slide 33

Here's an explanation of the survey status codes that can appear in the Status column of the Surveys screen:

If **Not Applicable** appears, it means that the content is not relevant to the institution and that the institution is not required to submit that survey.

**NO DATA**, in upper case, means that the screening questions for that survey have not been answered. The responses to screening questions are required before survey pages are generated.

**No Data**, in upper and lower case, means no data have been entered for that survey.

### Slide 34

In the Status column, the term **Has Data** indicates that some data have been entered, but the process is NOT complete. The Keyholder must run Perform Edits.

The term **Edited** indicates that the Edits have been run. Next, the keyholder goes to the **Edit Report** to resolve edit errors.

The term **Clean** indicates that all edit errors have been resolved. The next step is to Lock.

### Slide 35

The term **Locked** indicates that the data have been successfully submitted by the institution. The final lock must still be applied if more than one is required (by the system level or state level Coordinator). That varies from state to state. Not all states require a second locking.

The term **Complete** indicates that all locks have been applied.

### Slide 36

All underlined words in the data collection system are links, and most are links to the IPEDS Glossary. For example, clicking on the **Status** link on the Surveys screen shows the definitions of the survey status indicators in a popup box.

Within a glossary entry, there may be links to other terms.

### Slide 37

At the top right-hand corner of most screens in the IPEDS data collection system is a link to Instructions for that screen. Clicking on the link brings up a popup window containing the instructions.

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## Slide 38

For all surveys, the navigation menu remains at the top of the screen. The name of the survey is in the first blue bar.

Then, there is a navigation menu for the survey on the left-hand side of the screen. You can move from screen to screen within the survey by clicking on the pages listed in this menu. You can hide this menu by clicking on the **Hide Menu** link above it. **Show Menu** brings the menu back.

As the red message at the top of the left menu indicates, there could be additional screens generated after you answer the screening questions. This message will disappear when all screening questions have been answered for the survey.

The icons at the bottom of the page, with labels such as **Invalid data type** and **Fatal error**, are used to indicate a problem and to point out where additional action is required. These icons and their explanations appear on each data screen.

The **Invalid data type** icon will show up next to a data entry, for example, when alphabetic characters are typed into a numeric field.

The **red X** appears on the page when there is a Fatal error that must be corrected before the survey can be locked.

The **yellow** exclamation point icon indicates that there is an edit flag that requires confirmation, explanation, or correction. Once this problem has been resolved, the yellow explanation icon turns to grey. Explanations can be later edited by clicking on the grey icon.

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## Section 5 - Entering Data

### Slide 39

Data can be either **keyed into** or **imported into** the IPEDS surveys.

Several system features can help you **key in** your survey data:

--You can print out blank survey forms to aid in the preparation of the data. These forms may be given to others on campus to show them what data they need to enter themselves or turn over to you.

--Some screens have a context box that you can use to enter additional information about the data collected on that page. Please note that many context boxes are displayed on the College Navigator college search website, so please make sure your comments are appropriate for that audience.

--You do not need to complete data entry on a survey in one sitting, but you may leave a session at any time using the **Logout** option on the menu bar.

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**IMPORTANT:** Before logging off, you must save your data by pressing the **Save** button at the bottom of the data entry screen.

#### Slide 40

Blank forms and other survey materials are available from the Help menu, by selecting **Survey Materials**.

#### Slide 41

A screen with questions will appear. Answering these questions will help to narrow down the choices of materials.

#### Slide 42

Once the answers have been submitted, a list of surveys appears. From this list, you can choose **Form** (a blank survey form), **Instructions**, **Frequently Asked Questions**, **Narrative Edits**, and **Import Specifications** by clicking on the appropriate icon.

These survey materials can also be accessed from the IPEDS data collection system welcome page.

#### Slide 43

To enter data, on the Surveys screen, click the **Enter Data** link under Steps to Locking.

#### Slide 44

Key the data onto the page, and then save it. Data are saved on a screen-by-screen basis by clicking one of the buttons at the bottom of the screen

The **Save** button saves the data and stays on the current screen.

**Save and Next** saves the data and moves to the next page.

**Next** moves to the next page without saving any data changes, but the system will then ask if the data should be saved.

**Reset** removes any changes made to the page since the last time it was saved. Unless this is the first page of the survey, a **Previous** button appears, allowing users to return to the previous page, if necessary, for editing purposes.

#### Slide 45

A message stating that the data were saved successfully appears if there are no immediate data problems.

The data collection system automatically runs the Screen edits program on the page when Save is clicked. Errors are generated if required data are not provided or if the data provided seem inappropriate or unlikely to be accurate. An edit icon appears next to the affected data field.

When you click on an edit icon, a pop-up window appears, displaying the error message and the action required.

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### Slide 46

Uploading data into the data collection system can be quicker than inputting the data one field at a time, depending on how much data needs to be submitted.

There are two file import formats: Fixed Length and Key Value. For 2009-10, the first X-M-L format will be available, but only for the Fall Enrollment survey collected in the Spring data collection.

In addition, another tool exists for small, for-profit institutions. Excel files can be used for the Human Resources and Finance surveys. The keyholder inputs the data into a spreadsheet and presses a button. This runs a macro that creates an import file. Then the keyholder uploads the import file into the data collection system, instead of having to key-enter the data.

### Slide 47

The File Upload feature is located under the Tools menu. Here are the steps for uploading a file:

First, select **File Upload** from the Tools menu.

Next, use **Browse** to find the upload file on your computer or institution's network.

Then, indicate which **File type** to use and which **Survey** to upload data for.

Finally, press the **Submit** button.

### Slide 48

You will have to create a data file in order to upload data. The record layouts are under the [Help](#) menu, along with the other Survey Materials.

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## Section 6 - Editing Data

### Slide 49

Editing the data (whether you've entered it by keying it or by uploading a file) is an interactive process. Instant feedback lets you know if there are any problems that need to be resolved.

All the survey components are edited individually and, when there's a problem, edit icons appear on the screen.

Printable edit reports can be generated if you need to research an area that needs further attention.

**IMPORTANT:** The IPEDS Help Desk is always available for assistance.

### Slide 50

Once the data have been entered, the survey status will change to **Has Data**.

Now it's time to edit. Simply click on the **Perform Edits** link in the [Steps to Locking](#) column.

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## Slide 51

There are three kinds of edit messages:

-- A **Confirmation** edit means that the numerical values need to be checked and confirmed, or fixed if incorrect. You will be asked to click in a box that confirms that the data you have entered are correct.

-- An **Explanation** edit asks for an explanation if data are unusual or different from expected values. Your response should explain the data, not simply confirm it.

--And a **Fatal** edit means the data must be fixed. The report cannot be locked until a Fatal error is corrected. Any questions about a Fatal error can be answered by the Help Desk.

Once the edits have been run, the Survey Status will change to **Edited**. Now clicks on **Resolve Errors** in the Steps to Locking column. This will take you to the Edit Report screen.

## Slide 52

The Edit Report lists all current errors for the survey. The errors are generated from two types of edits: **Global Edits** and **Screen Edits**.

Screen Edits are performed at the time the data are saved on a page. The edit usually involves only data elements on that page.

Global Edits are performed when you click on the **Perform Edits** button on the Surveys page. Global edits can compare data from different pages of the same survey or from different surveys.

If there are missing data, Global Edits will not run, as shown in the first error message on the screen.

On the Edit Report, the Description Column describes the edit problem. The Severity Column will indicate whether this is a **Fatal**, **Explanation**, or **Confirmation** error. When the error is Fatal, you must click on **Back to survey data** to fix the problem.

To deal with **Explanation** or **Confirmation** errors, click on the Explanation link and confirm the data or enter an explanation. The Resolved column will change to **Yes** once Explanation and Confirmation errors are explained and confirmed. Explanations can also be entered from the data screen itself.

Before the data are considered **Clean** and ready to lock, the Resolved column must show **Yes** for every error.

You can return to the Surveys page by hitting the link at the bottom center of the edits page.

As always, instructions are available by clicking the link in the upper right-hand corner.

### Slide 53

Here is a screen from the Test University that contains errors. There are two **Fatal** errors indicated with **red X** icons, and there are two **Explanation** errors, indicated with **yellow** exclamation point icons.

Please note that this survey screen (and several that follow) is from a previous data collection and is meant to be an example of how the data collection system works, not a representation of any of the current surveys.

### Slide 54

Click on the error icon to get details about the error. In this case, the system is saying that the amount for tuition and fees should be greater than \$500.

You must fix this **Fatal** error. The report cannot be locked without resolving Fatal errors. You should contact the IPEDS Help Desk if assistance is needed in resolving a Fatal error.

### Slide 55

This slide illustrates the difference between Explanations and Context notes.

The second error on the screen is an **Explanation** error. When you click on the yellow exclamation point icon, a box appears, and you enter an explanation about the data into that box.

The box shown at the bottom of the slide is called a **Context Box**. Information that is entered in a Context Box may be posted on the College Navigator Web site. The box will be labeled to indicate if the information put into it will appear on the site.

### Slide 56

**Edit Explanations** are different from text entered into a Context Box. Edit Explanations detail why the entered data is correct, even though the data failed the edit.

Explanations are required, and they will not be published anywhere on the IPEDS Web sites.

The system will accept almost any explanation. However, you should be aware that the IPEDS Help Desk reads all explanations

### Slide 57

**Context Boxes** allow respondents to provide contextual information about the data they are reporting--as they report it.

Context notes are optional. The IPEDS system does not require contextual information. However, Context notes can be useful and many are published on College Navigator. You may use context boxes to inform users of College Navigator about features of your institution that cannot be described through IPEDS data.

### Slide 58

The IPEDS Help Desk reviews all text in Context Boxes for clarity, relevance, and grammar, since this information may be made public.

Someone from the Help Desk will contact you if additional clarification is needed.

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## Section 7 - Locking Data

### Slide 59

Before a survey can be locked, the survey status must be “Clean.” This means that the edits have been run and all errors have been resolved.

Once the survey has been locked, it becomes view-only. The data on the screens can be seen, but changes can no longer be made. If a change to the survey is needed, you must contact the IPEDS Help Desk to unlock it.

### Slide 60

As you can see on this slide, all edit errors have been addressed for the Institutional Characteristics survey, and the survey status is now “Clean.”

The survey is ready to be locked. To lock, the Keyholder clicks on the **Lock** link in the Steps to Locking column.

### Slide 61

The system opens a warning message that additional changes cannot be made after the survey is locked, unless the Help Desk is contacted.

Click the **Continue with locking** button to complete the locking process.

### Slide 62

Once the survey has been locked, a confirmation message appears and can be printed for the record. To print a copy of the survey submission, return to the Surveys page and use the **Printable Data** option.

In addition to the online confirmation message, the data collection system will send you an e-mail verifying that the survey was locked.

### Slide 63

Now the survey status shows that the status for Institutional Characteristics is **Complete**.

It also shows that the one required lock has been applied. This is indicated by the “1/1 locks” message in parentheses after the word **Complete**.

There are no links in the Steps to Locking column any longer because the locking is finished.

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By clicking the appropriate link under **Options**, you can

- view the data
- print the data, or
- view the resolved edit report.

The Completions and 12-Month Enrollment are at **No Data** status. For each of those surveys, you must undertake the same basic steps: Enter data, edit data, resolve errors, and lock.

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## Section 8 - Other Features, Resources, and Help

### Slide 64

The IPEDS data collection system has other features that can help with data submission tasks. From the **Reports** menu, you can access

- the edit report
- the review plan
- the combined data report
- survey forms with data and without, and
- the access profile.

### Slide 65

The **Reporting and Review Plan** screen displays the **Coordination Tree** for the institution. It shows the access rights and lock order of the users who have access to particular surveys.

The **Reporting and Review Plan** shows the User ID for each user with access to the institution's survey data and the type of access the user has: **Update** or **View**.

The Lock Order column displays the order in which locking users will apply their locks.

The example on this slide shows that 4 people have access to this institution's IPEDS data in the data collection system (the Keyholder and 3 coordinators), but only 1 lock is required for each survey component.

### Slide 66

The **Combined Data Report** specifies whether data are reported separately for the institution or combined with another institution's submission.

A "parent institution" is the one which reports the combined data. A "child institution" is the one whose data are included on the report submitted by the parent institution.

When combined data are reported, the report indicates which institution is responsible for the data submission.

If the institution reports all its own data, and no combined data, a message at the top of the screen will read, "No parent/child reporting relationships exist."

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Whether the institution is a child reporter or a parent reporter, the applicable surveys will be listed, along with the identity of the institution doing the reporting.

If you have questions about combined reporting, please contact the Help Desk.

### Slide 67

Survey forms with data can be viewed and printed by using the **Survey forms (data)** option found on the Reports menu.

Only surveys for which data have been entered will appear on the list of available surveys.

Click the **View Form** link, located to the right of the survey name, to open the appropriate form.

You can also print individual screens directly from the data entry screens by using your browser's Print button.

### Slide 68

The **Access Profile** report lists the user's access rights for each survey.

The Access column indicates if a user has **View** or **Update** access to the data.

The Status column shows the current status of each survey.

### Slide 69

Under the **Tools** menu, you can

- Create Additional Users
- Export data in a file
- Upload files
- Get the upload spreadsheets
- Upload and edit custom comparison groups for the IPEDS Data Feedback Report
- Change your contact information

Next year, you will be able to opt-out of many of the follow-up e-mail prompts, but this feature is not available to new keyholders.

### Slide 70

The **Help** menu provides information regarding:

--survey materials, including blank forms, instructions, import specifications, narrative edits, and Frequently Asked Questions

--important information about IPEDS, including tips for using the data collection system, procedures for responding to surveys, statutory requirements for reporting, changes, this year's schedule for reporting

--FAQs about IPEDS and reporting race and ethnicity

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--a link to a data collection system tutorial

-- the IPEDS glossary

--information about the Classification of Instructional Programs, or CIP, used to classify programs on the Institutional Characteristics and Completions surveys, and

--a link to the AIR website and the IPEDS Data Collection Tutorials, for specific information about completing each IPEDS survey.

### Slide 71

Your task as a Keyholder begins here at the IPEDS home page. You can access the data collection system by clicking on the **Data Provider Center** link in the top blue bar.

On this home page are links to all the IPEDS Data Tools as well as publications, training and outreach, and many other resources.

Directory, program, and student information for institutions across the nation can be found on College Navigator. As one of your first duties as IPEDS keyholder, you might want to check out your institution's profile on College Navigator.

### Slide 72

Begin the IPEDS reporting cycle early and seek help, when needed, from the IPEDS Help Desk. The knowledgeable staff is eager to help; however, as mentioned earlier, response time may be longer near the end of the collection cycle.

This concludes the tutorial for new Keyholders.

Thank you.