Human Resources for degree-granting institutions and related administrative offices that have 15 or more full-time staff and a tenure system - No Race/Ethnicity

Human Resources Screening Questions

Does your institution have any part-time staff?

*If you answer **Yes** to this question, you will be provided the screens to report part-time staff.*

○ Yes ○ No

Does your institution have 15 or more full-time staff?

○ Yes ○ No

Do ALL of the instructional staff at your institution fall into any of the following categories?

*If you answer **Yes** to any of the questions below, the full-time instructional staff screens of **Part G** are **NOT** applicable to your institution and you will **NOT** be required to report data for the full-time instructional staff screens of **Part G**. However, Part G will still be required for reporting data for full-time non-instructional staff.*

○ No	○ Yes	Are ALL of the instructional staff military personnel?
○ No	○ Yes	Do ALL of the instructional staff contribute their services (e.g., members of a religious order)?
○ No	○ Yes	Do ALL of the instructional staff teach pre-clinical or clinical medicine?

The reporting of data by gender AND race/ethnicity is optional this year as it is in even-numbered years.

Do you wish to report data by gender AND race/ethnicity this year?
If you answer **No**, screens to report data by employment status (full-time and part-time) and occupational category will be displayed.
If you answer **Yes**, screens to report data by employment status (full-time and part-time), occupational category, and gender AND race/ethnicity will be displayed and you must complete all applicable screens.

○ No, I will not report data by gender and race/ethnicity this year

○ Yes, I will report data by gender and race/ethnicity this year

You may use the space below to provide context for the data you've reported above.

Human Resources Screening Questions

Does your institution have a tenure system?			
*If you answer **Yes** to this question, you will be provided the screens to report some data by tenure status.*			
	○	Yes	○ No
Does your institution have graduate assistants?			
*If you answer **Yes** to this question, you will be provided the screens to report graduate assistants.*			
	○	Yes	○ No
Did your institution hire any full-time permanent staff who were included on the payroll of the institution between July 1 and October 31, 2012 either for the *first time* (new to the institution) or *after a break in service* AND who were still on the payroll of the institution as of November 1, 2012? (Exclude persons who have returned from sabbatical leave OR full-time Postsecondary Staff who are working less-than-9-month contracts.)			
*If you answer **Yes** to this question and your institution has 15 or more full-time staff, you will be provided the screens to report **full-time permanent new hires** in **Part H**.*			
	○	Yes	○ No

Part A - Full-time instructional staff by Rank and Tenure status

Number of full-time instructional staff by academic rank and tenure status As of November 1, 2012							
	Professors	Associate professors	Assistant professors	Instructors	Lecturers	No academic rank	Total
Tenured							
On Tenure Track							
Not on Tenure Track							
Multi-year contract							
Annual contract							
Less-than-annual contract							
Without Faculty status							
Total							

Part A - Full-time instructional staff

Number of full-time instructional staff by tenure status, medical school status, and function							
	Tenured	On Tenure Track	Not on Tenure Track			Without Faculty status	Total
			Multi-year contract	Annual contract	Less-than-annual contract		
Non-medical and function							
Instruction							
Exclusively credit							
Exclusively not-for-credit							
Combined credit/not-for-credit							
Instruction/research/public service							
Medical and function							
Instruction							
Exclusively credit							
Exclusively not-for-credit							
Combined credit/not-for-credit							
Instruction/research/public service							
Total carried forward from previous screens							

Part B - Full-time non-instructional staff

Number of full-time non-instructional staff

by tenure status, medical school status and occupational category

As of November 1, 2012

Medical school status and occupational category	Tenured	On Tenure Track	Not on Tenure Track			Without Faculty status	Total
			Multi-year contract	Annual contract	Less-than-annual contract		
Non-Medical							
Postsecondary Teachers - Research							
Postsecondary Teachers - Public Service							
Archivists, Curators, and Museum Technicians							
Librarians							
Library Technicians							
Other Teachers and Instructional Support Staff							
Management Occupations							
Business and Financial Operations Occupations							
Computer, Engineering, and Science Occupations							
Community Service, Legal, Arts, and Media Occupations							
Healthcare Practitioners and Technical Occupations							
Medical							
Postsecondary Teachers - Research							
Postsecondary Teachers - Public Service							
Archivists, Curators, and Museum Technicians							
Librarians							
Library Technicians							
Other Teachers and Instructional Support Staff							
Management Occupations							
Business and Financial Operations Occupations							
Computer, Engineering, and Science Occupations							
Community Service, Legal, Arts, and Media Occupations							
Healthcare Practitioners and Technical Occupations							

Part B - Full-time non-instructional staff

Number of full-time non-instructional staff
by medical school status and occupational category
As of November 1, 2012

Occupational category	Total	Non-Medical	Medical
Service Occupations			
Sales and Related Occupations			
Office and Administrative Support Occupations			
Natural Resources, Construction, and Maintenance Occupations			
Production, Transportation, and Material Moving Occupations			

Part C - Full-time summary non-medical

Summary of full-time, non-medical school, staff
by tenure status and occupational category
As of November 1, 2012

Occupational category	Tenured	On Tenure Track	Not on Tenure Track			Without Faculty status	Total
			Multi-year contract	Annual contract	Less-than-annual contract		
Postsecondary Teachers							
Instruction							
Exclusively credit							
Exclusively not-for-credit							
Combined credit/not-for-credit							
Instruction/research/public service							
Research							
Public Service							
Archivists, Curators, and Museum Technicians							
Librarians							
Library Technicians							
Other Teachers and Instructional Support Staff							
Management Occupations							
Business and Financial Operations Occupations							
Computer, Engineering, and Science Occupations							
Community Service, Legal, Arts, and Media Occupations							
Healthcare Practitioners and Technical Occupations							
Service Occupations							
Sales and Related Occupations							
Office and Administrative Support Occupations							
Natural Resources, Construction, and Maintenance Occupations							
Production, Transportation, and Material Moving Occupations							
Total							

Part C - Full-time summary medical

Summary of full-time, medical school, staff
by tenure status and occupational category
As of November 1, 2012

Occupational category	Tenured	On Tenure Track	Not on Tenure Track			Without Faculty status	Total
			Multi-year contract	Annual contract	Less-than-annual contract		
Postsecondary Teachers							
Instruction							
Exclusively credit							
Exclusively not-for-credit							
Combined credit/not-for-credit							
Instruction/research/public service							
Research							
Public Service							
Archivists, Curators, and Museum Technicians							
Librarians							
Library Technicians							
Other Teachers and Instructional Support Staff							
Management Occupations							
Business and Financial Operations Occupations							
Computer, Engineering, and Science Occupations							
Community Service, Legal, Arts, and Media Occupations							
Healthcare Practitioners and Technical Occupations							
Service Occupations							
Sales and Related Occupations							
Office and Administrative Support Occupations							
Natural Resources, Construction, and Maintenance Occupations							
Production, Transportation, and Material Moving Occupations							
Total							

Part G - Salary Worksheet

Number of full-time, non-medical, instructional staff for calculation of total number of months As of November 1, 2012								
Gender and academic rank	9-Month Contract	10-Month Contract	11-Month Contract	12-Month Contract	Total employees for Salary reporting	Total Number of Months	Total full-time, non-medical, instructional staff from Part A	Balance (All other full-time instructional staff)
Men								
Professors								
Associate professors								
Assistant professors								
Instructors								
Lecturers								
No academic rank								
Total men								
Women								
Professors								
Associate professors								
Assistant professors								
Instructors								
Lecturers								
No academic rank								
Total women								
Total (men + women)								

Part G - Salary outlays for full-time instructional staff

Salary outlays for full-time, non-medical, instructional staff by gender and academic rank As of November 1, 2012				
Gender and academic rank	Headcount (from Part G, screen 1) OR Total employees for Salary reporting	Total Number of Months (from Part G, screen 1)	Salary Outlays	Weighted average Salaries per month
Men				
Professors				
Associate professors				
Assistant professors				
Instructors				
Lecturers				
No academic rank				
Total men				
Women				
Professors				
Associate professors				
Assistant professors				
Instructors				
Lecturers				
No academic rank				
Total women				
Total (men + women)				

Part G - Salary outlays for full-time non-instructional staff

Salary outlays for full-time, non-medical, non-instructional staff by occupational category As of November 1, 2012		
Occupational category	Number of full-time staff	Total salary outlays
Postsecondary Teachers - Research		
Postsecondary Teachers - Public Service		
Library and Instructional Support Occupations		
Management Occupations		
Business and Financial Operations Occupations		
Computer, Engineering, and Science Occupations		
Community Service, Legal, Arts, and Media Occupations		
Healthcare Practitioners and Technical Occupations		
Service Occupations		
Sales and Related Occupations		
Office and Administrative Support Occupations		
Natural Resources, Construction, and Maintenance Occupations		
Production, Transportation, and Material Moving Occupations		

Part E - Part-time staff

Number of part-time staff

by tenure status, medical school status and occupational category

As of November 1, 2012

Medical school status and occupational category	Tenured	On Tenure Track	Not on Tenure Track			Without Faculty status	Total
			Multi-year contract	Annual contract	Less-than-annual contract		
Non-Medical							
Postsecondary Teachers							
Instruction							
Exclusively credit							
Exclusively not-for-credit							
Combined credit/not-for-credit							
Instruction/research/public service							
Research							
Public Service							
Archivists, Curators, and Museum Technicians							
Librarians							
Library Technicians							
Other Teachers and Instructional Support Staff							
Management Occupations							
Business and Financial Operations Occupations							
Computer, Engineering, and Science Occupations							
Community Service, Legal, Arts, and Media Occupations							
Healthcare Practitioners and Technical Occupations							
Medical							
Postsecondary Teachers							
Instruction							
Exclusively credit							
Exclusively not-for-credit							
Combined credit/not-for-credit							
Instruction/research/public service							
Research							
Public Service							
Archivists, Curators, and Museum Technicians							
Librarians							
Library Technicians							
Other Teachers and Instructional Support Staff							
Management Occupations							
Business and Financial Operations Occupations							

Computer, Engineering, and Science Occupations							
Community Service, Legal, Arts, and Media Occupations							
Healthcare Practitioners and Technical Occupations							

Part E - Part-time staff

Number of part-time staff
by medical school status and occupational category
As of November 1, 2012

Occupational category	Total	Non-Medical	Medical
Service Occupations			
Sales and Related Occupations			
Office and Administrative Support Occupations			
Natural Resources, Construction, and Maintenance Occupations			
Production, Transportation, and Material Moving Occupations			
Graduate Assistants			
Teaching			
Research			
Management			
Business and Financial Operations			
Computer, Engineering, and Science			
Community Service, Legal, Arts, and Media			
Library and Instructional Support			
Healthcare Practitioners and Technical			

Part F - Part-time summary non-medical

Summary of part-time staff
by tenure status and occupational category
As of November 1, 2012

Occupational category	Tenured	On Tenure Track	Not on Tenure Track			Without Faculty status	Total
			Multi-year contract	Annual contract	Less-than-annual contract		
Postsecondary Teachers							
Instruction							
Exclusively credit							
Exclusively not-for-credit							
Combined credit/not-for-credit							
Instruction/research/public service							
Research							
Public Service							
Archivists, Curators, and Museum Technicians							
Librarians							
Library Technicians							
Other Teachers and Instructional Support Staff							
Management Occupations							
Business and Financial Operations Occupations							
Computer, Engineering, and Science Occupations							
Community Service, Legal, Arts, and Media Occupations							
Healthcare Practitioners and Technical Occupations							
Service Occupations							
Sales and Related Occupations							
Office and Administrative Support Occupations							
Natural Resources, Construction, and Maintenance Occupations							
Production, Transportation, and Material Moving Occupations							
Graduate Assistants							
Teaching							
Research							
Management							
Business and Financial Operations							
Computer, Engineering, and Science							
Community Service, Legal, Arts, and Media							
Library and Instructional Support							
Healthcare Practitioners and Technical							
Total							

Part F - Part-time summary medical

Summary of part-time, medical school, staff
by tenure status and occupational category
As of November 1, 2012

Occupational category	Tenured	On Tenure Track	Not on Tenure Track			Without Faculty status	Total
			Multi-year contract	Annual contract	Less-than-annual contract		
Postsecondary Teachers							
Instruction							
Exclusively credit							
Exclusively not-for-credit							
Combined credit/not-for-credit							
Instruction/research/public service							
Research							
Public Service							
Archivists, Curators, and Museum Technicians							
Librarians							
Library Technicians							
Other Teachers and Instructional Support Staff							
Management Occupations							
Business and Financial Operations Occupations							
Computer, Engineering, and Science Occupations							
Community Service, Legal, Arts, and Media Occupations							
Healthcare Practitioners and Technical Occupations							
Service Occupations							
Sales and Related Occupations							
Office and Administrative Support Occupations							
Natural Resources, Construction, and Maintenance Occupations							
Production, Transportation, and Material Moving Occupations							
Graduate Assistants							
Teaching							
Research							
Management							
Business and Financial Operations							
Computer, Engineering, and Science							
Community Service, Legal, Arts, and Media							
Library and Instructional Support							
Healthcare Practitioners and Technical							
Total							

Part H - New Hires - Total New Hires

Number of newly hired full-time permanent instructional and non-instructional staff by tenure status and occupational category (Hired full time between July 1 and October 31, 2012 and still on payroll of the institution as of November 1, 2012)

Occupational category	Tenured	On Tenure Track	Not on Tenure Track			Without Faculty status	Total
			Multi-year contract	Annual contract	Less-than-annual contract		
Postsecondary Teachers							
Instructional Staff							
Research							
Public Service							
Library and Instructional Support Occupations							
Management Occupations							
Business and Financial Operations Occupations							
Computer, Engineering, and Science Occupations							
Community Service, Legal, Arts, and Media Occupations							
Healthcare Practitioners and Technical Occupations							
Service Occupations							
Sales and Related Occupations							
Office and Administrative Support Occupations							
Natural Resources, Construction, and Maintenance Occupations							
Production, Transportation, and Material Moving Occupations							

Human Resources Survey Evaluation

Were any staff members difficult to categorize? If so, please explain in the box below.

Prepared by

This survey component was prepared by:

○	Keyholder	○	SFA Contact	○	HR Contact	○	Finance Contact	○	Other

Name: _____

Email: _____

How long did it take to prepare this survey component? _____ hours _____ minutes

The name of the preparer is being collected so that we can follow up with the appropriate person in the event that there are questions concerning the data. The Keyholder will be copied on all email correspondence to other preparers.

The time it took to prepare this component is being collected so that we can continue to improve our estimate of the reporting burden associated with IPEDS. Please include in your estimate the time it took for you to review instructions, query and search data sources, complete and review the component, and submit the data through the Data Collection System.

Thank you for your assistance.

2012-13 HR: Degree-granting Institutions and Related Administrative Offices that have 15 or more full-time staff

Instructions for the 2012-13 Integrated Postsecondary Education Data System (IPEDS) Human Resources (HR) Component Applicable to Degree-granting Institutions and Related Administrative Offices that have 15 or more full-time staff

UPDATED – 10/31/12: The previous titles of "**Non-postsecondary** Teaching Occupations" and "Graduate Assistants - Library and **Non-postsecondary** Teaching" were changed to "Other Teaching and Instructional Support Occupations" and "Graduate Assistants – Library and Instructional Support," respectively for clarity. Also, a "NOTE" about staff on sabbatical leave and staff who are on leave was added to the Salaries section of the IPEDS HR instructions for clarity; however, the same instruction was included in prior years of the IPEDS HR instructions. [The data entry screen that includes the screening question on salaries was revised for clarity to indicate the reporting of data for Part G, full-time non-instructional staff, will still be required even if the answers to the "instructional staff" screening questions are No.]

•**Purpose of Component**

•**Changes in Reporting**

•**General Instructions**

•**Context Boxes**

•**Reporting Period Covered**

•**Coverage**

•**Academic Rank**

•Where to Get Help

•**Where the Data Will Appear**

•**Detailed Instructions**

•**Screening Questions**

•**Reporting Persons by Racial/Ethnic Category**

•**Reporting Staff by Occupational Category**

- 2010 Standard Occupational Classification (SOC) System - Classification Principles
- 2010 Standard Occupational Classification (SOC) System - Coding Guidelines
- Additional Reporting Information
- Descriptions of Occupational Categories

•New Hires
•Salaries
•Medical School Staff

•Summary of Parts

Purpose of Component

The primary purpose of the Human Resources (HR) component that is applicable to degree-granting institutions and related administrative offices that have 15 or more full-time staff is to collect the number of staff by employment status (full time and part time), occupational category, and for some staff by tenure status, contract length, and academic rank. Salary data on full-time staff are also collected in addition to data on newly hired full-time permanent staff. Data are also collected by medical school status for 4-year and above degree-granting institutions. In odd-numbered years (e.g., 2011-12) such as last year, the purpose was also to collect data by race/ethnicity and gender. The reporting of data by race/ethnicity and gender is optional in even-numbered years such as this year (2012-13).

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Changes in Reporting

•
New occupational categories replaced the primary function/occupational activity categories previously used in the IPEDS HR component. The change was required to align the IPEDS HR categories with the 2010 Standard Occupational Classification (SOC) System. Detailed information on the IPEDS HR component and how it relates to the 2010 SOC system is listed below in the section called, "Reporting Staff by Occupational Category." Additional information on the IPEDS HR component and the SOC system can be found at the IPEDS Human Resources/SOC Information Center at http://nces.ed.gov/ipeds/resource/soc.asp.
•
The professional and non-professional terminology is no longer used.
•A screening question has been added that asks if an institution has graduate assistants.
•A screening question has been added that asks if an institution has a tenure system.
•The following categories were added to collect data on not on tenure track staff:
- Multi-year contract
- Annual contract
- Less-than-annual contract

•Data are now collected by the new category of "Postsecondary Teachers."
•The Postsecondary Teachers category by the "Instruction" (only) function is collected by the following categories:
- Exclusively credit
- Exclusively not-for-credit
- Combination credit/not-for-credit

•Graduate assistants are reported separately by the following categories: Teaching; Research; Management; Business and Financial Operations; Computer, Engineering, and Science; Community Service, Legal, Arts, and Media; Library and Instructional Support; and Healthcare Practitioners and Technical. [NOTE: The previous graduate assistant category called, "Library and Non-postsecondary Teaching" was changed to the current graduate assistant category called "Library and Instructional Support" for clarity on 10/31/12.]
•A salary worksheet was added to collect the number of full-time, non-medical, instructional staff separately by gender and academic rank for the following contracts: 9-month contract, 10-month contract, 11-month contract, and 12-month contract. Salary outlays of full-time, non-medical, instructional staff are also collected by gender and academic rank. A column was added to the survey after the salary outlays column to collect the number of months covered by the salary outlays. (This number will be used to calculate a weighted monthly average salary.)

To assist data reporters in determining the number of hours covered, a worksheet is provided in the data collection system that collects the number of staff on 9-month contracts, 10-month contracts, 11-month contracts, and 12-month contracts, by gender and academic rank. For each gender and academic rank category, the system would then calculate: (1) the total number of staff reported (i.e., the sum of the values entered for each contract length), and (2) the total number of months covered (i.e., the sum of the staff reported for each contract length multiplied by the number of months in the contract).

Salary outlays are also collected for full-time, non-medical, non-instructional staff by occupational category on a separate screen. (The number of full-time, non-medical, non-instructional staff by occupational category is carried forward from Part A.) These totals are not disaggregated by race/ethnicity and gender.

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General Instructions

NOTE: You must enter data on each displayed screen. If a displayed screen is not applicable to your institution, you must enter at least one zero in a field on that screen.

Context Boxes

Context boxes (previously known as caveat boxes) are provided on several screens to give institutions the opportunity to provide more information about survey items.

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Reporting Period Covered

The period of reporting is intended to provide a snapshot of your human resources/payroll data at one point in the fall. Persons on the payroll of the institution as of **November 1, 2012** should be reported in the HR component.

Degree-granting institutions and related administrative offices that have ***15 or MORE full-time staff*** AND responded "Yes" to the screening question about full-time permanent new hires will be required to complete Part H. Part H has slightly different reporting criteria from the other parts. In Part H, report the number of **full-time permanent staff who were included on the payroll of the institution between July 1 and October 31, 2012 either for the first time (new to the institution) or after a break in service AND who were still on the payroll of the institution as of November 1, 2012**. Do not include as new hires persons who have returned from sabbatical leave OR full-time Postsecondary Staff who are working less-than-9-month contracts.

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Coverage

Who to Include in this Report

- Staff who are on sabbatical leave and staff who are on leave, but remain on the payroll.
- Postsecondary Teachers who are hired to temporarily replace Postsecondary Teachers who are on sabbatical leave or on leave without pay.
- "Visiting" Postsecondary Teachers who are paid by your institution.
- Adjunct Postsecondary Teachers who are employed on a full-time or on a part-time basis in the occupational category for which they were hired.
- Staff in Workforce Development training programs and Adult Basic Education (ABE) programs.
- Staff at off-campus centers associated with the campus covered by this report. (Do not include staff who work at branch campuses located in a foreign country.)

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Who *NOT* to Include in this Report

- Staff on leave without pay.
- Staff in the military or religious orders who are not paid by your institution.
- Staff whose services are contracted by or donated to the institution.
- Casual staff (hired on an ad-hoc or occasional basis to meet short-term needs).
- Undergraduate students.
- Students in the College Work-Study Program.
- Staff who work strictly in hospitals associated with medical schools.

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Academic Rank

When reporting Instructional Staff by academic rank (e.g., professor, associate professor, etc.), use the institution's designations. Institutions without standard academic ranks should report all Postsecondary Staff in the "No Academic Rank" category.

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Where to Get Help

IPEDS Data Collection Help Desk

Phone: 1-877-225-2568
Email: ipedshelp@rti.org

AIR Website

You can also consult the AIR website that contains several tutorials on IPEDS data collection, a self-paced overview of IPEDS tools and other valuable resources.

IPEDS Resources Page

In addition, the IPEDS Resources Page contains frequently asked questions, a link to the glossary, data tip sheets, an archive of survey instruments, information on the new race/ethnicity categories and other relevant information.

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Where the Data Will Appear

Data collected through IPEDS will be accessible at the institution- and aggregate-levels.
At the institution-level, data will appear in the:

- College Navigator Website
- IPEDS Data Center
- IPEDS Data Feedback Reports

At the aggregate-level, data will appear in:

- IPEDS First Looks
- IPEDS Table Library
- IPEDS Data Feedback Reports
- The Digest of Education Statistics
- The Condition of Education

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Detailed Instructions

NOTE: You must enter data on each displayed screen. If a displayed screen is not applicable to your institution, you must enter at least one zero in a field on that screen.

Screening Questions

Please read and answer the screening questions in the data collection system very carefully. (These questions must be answered before providing detailed data.) Responses to the screening questions will determine which parts must be completed.

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Reporting Persons by Racial/Ethnic Category

Reporting Persons by Racial/Ethnic Category (1997 OMB)

This information is being collected in compliance with Title VI of the Civil Rights Act of 1964 and Title IX of the Education Amendments of 1972 and Sec. 421(a)(1) of the Carl D. Perkins Vocational Education Act. These instructions correspond with the Final Guidance on Maintaining, Collecting, and Reporting Racial and Ethnic Data to the U.S. Department of Education, published in the Federal Register on October 19, 2007.

Method of collection - Institutions must collect race and ethnicity information using a 2-question format. The first question is whether the respondent is Hispanic/Latino. The second question is whether the respondent is from one or more races from the following list: American Indian or Alaska Native, Asian, Black or African American, Native Hawaiian or Other Pacific Islander, and White. Institutions should allow students and staff to self-identify their race and ethnicity. For further details on the guidance for collecting data, please see the full Federal Register notice.
Method of reporting aggregate data - Institutions must report aggregate data to the U.S. Department of Education using the NINE categories below. Racial/ethnic designations are requested only for United States citizens, resident aliens, and other eligible non-citizens.

- Hispanic or Latino, regardless of race

For Non-Hispanic/Latino individuals:

- American Indian or Alaska Native
- Asian
- Black or African American
- Native Hawaiian or Other Pacific Islander
- White
- Two or more races

In addition, the following categories may be used:

- Nonresident alien
- Race and ethnicity unknown

Racial/ethnic descriptions - Racial/ethnic designations as used in this survey do not denote scientific definitions of anthropological origins. The categories are:

- Hispanic or Latino- A person of Cuban, Mexican, Puerto Rican, South or Central American, or other Spanish culture or origin, regardless of race.
- American Indian or Alaska Native- A person having origins in any of the original peoples of North and South America (including Central America) who maintains cultural identification through tribal affiliation or community attachment.
- Asian- A person having origins in any of the original peoples of the Far East, Southeast Asia, or the Indian Subcontinent, including, for example, Cambodia, China, India, Japan, Korea, Malaysia, Pakistan, the Philippine Islands, Thailand, and Vietnam.
- Black or African American- A person having origins in any of the black racial groups of Africa.
- Native Hawaiian or Other Pacific Islander- A person having origins in any of the original peoples of Hawaii, Guam, Samoa, or other Pacific Islands.
- White - A person having origins in any of the original peoples of Europe, the Middle East, or North Africa.

Other descriptive categories

- **Nonresident alien** - A person who is not a citizen or national of the United States and who is in this country on a visa or temporary basis and does not have the right to remain indefinitely. NOTE - Nonresident aliens are to be reported separately, in the boxes provided, rather than included in any of the seven racial/ethnic categories. Resident aliens and other eligible (for financial aid purposes) non-citizens who are not citizens or nationals of the United States and who have been admitted as legal immigrants for the purpose of obtaining permanent resident alien status (and who hold either an alien registration card (Form I-551 or I-151), a Temporary Resident Card (Form I-688), or an Arrival-Departure Record (Form I-94) with a notation that conveys legal immigrant status such as Section 207 Refugee, Section 208 Asylee, Conditional Entrant Parolee or Cuban-Haitian) are to be reported in the appropriate racial/ethnic categories along with United States citizens.
- **Race and ethnicity unknown** - This category is used only if the person did not select EITHER a racial or ethnic designation.

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Reporting Staff by Occupational Category

The occupational categories in the IPEDS HR component were changed to become aligned with the occupational categories in the 2010 Standard Occupational Classification (SOC) System. The SOC Classification Principles and Coding Guidelines were also revised in 2010. Listed below is an example of one change to the Classification Principles; however, please refer to the complete list of Classification Principles and Coding Guidelines below.

Example of SOC Classification Principle:

Old: Occupations are classified based on work performed and on required skills, education, training, and credentials.

New: Occupations are classified based on work performed and, in some cases, on the skills, education, and/or training needed to perform the work at a competent level."

2010 SOC Classification Principles

The SOC *Classification Principles* form the basis on which the SOC system is structured.

1. The SOC covers all occupations in which work is performed for pay or profit, including work performed in family-operated enterprises by family members who are not directly compensated. It excludes occupations unique to volunteers. Each occupation is assigned to only one occupational category at the lowest level of the classification.

2. Occupations are classified based on work performed and, in some cases, on the skills, education, and/or training needed to perform the work at a competent level.

3. Workers primarily engaged in planning and directing are classified in management occupations in Major Group 11-0000. Duties of these workers may include supervision.

4. Supervisors of workers in Major Groups 13-0000 through 29-0000 usually have work experience and perform activities similar to those of the workers they supervise, and therefore are classified with the workers they supervise.

5. Workers in Major Group 31-0000 Healthcare Support Occupations assist and are usually supervised by workers in Major Group 29-0000 Healthcare Practitioners and Technical Occupations. Therefore, there are no first-line supervisor occupations in Major Group 31-0000.

6. Workers in Major Groups 33-0000 through 53-0000 whose primary duty is supervising are classified in the appropriate first-line supervisor category because their work activities are distinct from those of the workers they supervise.

7. Apprentices and trainees are classified with the occupations for which they are being trained, while helpers and aides are classified separately because they are not in training for the occupation they are helping.

8. If an occupation is not included as a distinct detailed occupation in the structure, it is classified in an appropriate "All Other," or residual, occupation. "All Other" occupations are placed in the structure when it is determined that the detailed occupations comprising a broad occupation group do not account for all of the workers in the group. These occupations appear as the last occupation in the group with a code ending in "9" and are identified in their title by having "All Other" appear at the end.

9. The U.S. Bureau of Labor Statistics and the U.S. Census Bureau are charged with collecting and reporting data on total U.S. employment across the full spectrum of SOC major groups. Thus, for a detailed occupation to be included in the SOC, either the Bureau of Labor Statistics or the Census Bureau must be able to collect and report data on that occupation.

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2010 SOC Coding Guidelines

The SOC *Coding Guidelines* are intended to assist users in consistently assigning SOC codes and titles to survey responses and in other coding activities.

1. A worker should be assigned to an SOC occupation code based on work performed.

2. When workers in a single job could be coded in more than one occupation, they should be coded in the occupation that requires the highest level of skill. If there is no measurable difference in skill requirements, workers should be coded in the occupation in which they spend the most time. Workers whose job is to teach at different levels (e.g., elementary, middle, or secondary) should be coded in the occupation corresponding to the highest educational level they teach.

3. Data collection and reporting agencies should assign workers to the most detailed occupation possible. Different agencies may use different levels of aggregation, depending on their ability to collect data. For more information on data produced using the SOC, see the Frequently Asked Questions (FAQs) section.

4. Workers who perform activities not described in any distinct detailed occupation in the SOC structure should be coded in an appropriate "All Other" or residual occupation. These residual occupational categories appear as the last occupation in a group with a code ending in "9" and are identified by having the words "All Other" appear at the end of the title.

5. Workers in Major Groups 33-0000 through 53-0000 who spend 80 percent or more of their time performing supervisory activities are coded in the appropriate first-line supervisor category in the SOC. In these same Major Groups (33-0000 through 53-0000), persons with supervisory duties who spend less than 80 percent of their time supervising are coded with the workers they supervise.

6. Licensed and non-licensed workers performing the same work should be coded together in the same detailed occupation, except where specified otherwise in the SOC definition.

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Additional Reporting Information

- IPEDS does not require institutions to manually code and report all occupations at the detailed SOC level. Most of the occupational data in IPEDS will be collected at a higher level (e.g., major level); however, there are a few instances where data will be collected at a lower level (e.g., detailed) such as Postsecondary Teachers. For IPEDS purposes, institutions should report their employees in the categories defined in the IPEDS HR survey. For example, a College President would most likely fall under the detailed SOC occupation of "Education Administrators, Postsecondary" (**11**-9033) where the first two-digits (**11**) of the SOC code represent the SOC "major group" in this example. Based on the 2012-13 IPEDS HR survey and the 2010 SOC crosswalk at http://nces.ed.gov/ipeds/resource/download/IPEDS_HR_2012-13_and_2010_SOC_Crosswalk.pdf, the SOC code of "**11-0000**" corresponds to the SOC major group of "Management Occupations," which is cross walked to the IPEDS HR "Management Occupations" category. Consequently, for IPEDS purposes, the College President should be placed in the "Management Occupations" category in the HR survey. [IPEDS does not require institutions to manually code the College President at the detailed level.]
- The following categories were added to collect data on not on tenure track staff:

- **Multi-year contract**- A contract or employment agreement that is in effect for more than one year (e.g., more than 365 days) where subsequent years of the contract may be contingent upon other factors such as the appropriation of funds. The renewal period of a multi-year contract is not on an annual basis (e.g., a 5-year multi-year contract is renewed every 5 years NOT annually).
- **Annual contract** - An annually-renewable contract or employment agreement that is in effect for a stated annual period within one year of execution, and may be equal to a period of 365 days, or a standard academic year, or the equivalent. Does not include contracts for partial year periods such as a single semester, quarter, term, block, or course.
- **Less-than-annual-contract** - A contract or employment agreement that is in effect for a partial year period of less than 365 days, or less than a standard academic year or the equivalent. Includes contracts for partial year periods such as a single semester, quarter, term, block, or course.

- **Hospitals, medical centers, and other entities that offer postsecondary education programs** as part of their mission should report only those staff who work full time or part time in the **postsecondary education division or component of the institution**. If a staff member works full time for the institution, but only part time in the postsecondary education division or component, for purposes of this survey, that person should be reported as part time in his or her occupational category in the postsecondary education division or component.

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Descriptions of Occupational Categories

Postsecondary Teachers (by function)

Listed below are descriptions of the "Postsecondary Teachers" category by function.

Instructional Staff **[NOTE: This heading was changed from "Instruction" to "Instructional Staff" in the instructions for clarification on 8/7/12.]**

Consist of staff members in the following categories:

- **Instruction (only)**

Persons whose specific assignments customarily are made for the purpose of providing instruction or teaching. Regardless of title, academic rank, or tenure status, these employees formally spend the majority of their time providing instruction or teaching.

- **Instruction combined with research and/or public service**

Persons for whom it is not possible to differentiate between instruction or teaching, research, and public service because each of these functions is an integral component of his/her regular assignment. Regardless of title, academic rank, or tenure status, these employees formally spend the majority of their time providing instruction, research, and/or public service.

Research

Persons whose specific assignments customarily are made for the purpose of **conducting research**. Regardless of title, academic rank, or tenure status, these employees formally spend the majority of their time conducting research.

Public Service

Persons whose specific assignments customarily are made for the purpose of **carrying out public service activities** such as agricultural extension services, clinical services, or continuing education. Regardless of title, academic rank, or tenure status, these employees formally spend the majority of their time carrying out public service activities. (This category includes employees with a public service assignment regardless of the location of the assignment (e.g., in the field rather than on campus).

Archivists, Curators, and Museum Technicians

The IPEDS HR occupational category called "**Archivists, Curators, and Museum Technicians**" is based on the broad occupation in the 2010 Standard Occupational Classification (SOC) Manual with the same name ("**Archivists, Curators, and Museum Technicians**"). Click on the following link for details on the SOC "**Archivists, Curators, and Museum Technicians**" broad occupation (25-4010): http://www.bls.gov/soc/2010/soc254010.htm.

Librarians

The IPEDS HR occupational category called "**Librarians**" is based on the broad occupation in the 2010 Standard Occupational Classification (SOC) Manual with the same name ("**Librarians**"). Click on the following link for details on the SOC "**Librarians**" broad occupation (25-4020): http://www.bls.gov/soc/2010/soc254020.htm.

Library Technicians

The IPEDS HR occupational category called "**Library Technicians**" is based on the broad occupation in the 2010 Standard Occupational Classification (SOC) Manual with the same name ("**Library Technicians**"). Click on the following link for details on the SOC "**Library Technicians**" broad occupation (25-4030): http://www.bls.gov/soc/2010/soc254030.htm.

Other Teachers and Instructional Support Staff

[NOTE: The above title ("Other Teachers and Instructional Support Staff") was changed from "Non-postsecondary Teachers" for clarity on 10/31/12; however, the SOC categories below remained the same.]

The IPEDS HR occupational category called "**Other Teachers and Instructional Support Staff**" is based on the following three minor groups in the 2010 SOC Manual. (For details on the three SOC minor groups, click on the links below.)

- **Pre-school, Primary, Secondary, and Special Education School Teachers**
  [SOC Minor Group 25-2000 - http://www.bls.gov/soc/2010/soc250000.htm#25-2000]
- **Other Teachers and Instructors**
  [SOC Minor Group 25-3000 - http://www.bls.gov/soc/2010/soc250000.htm#25-3000]
- **Other Education, Training, and Library Occupations**
  [SOC Minor Group 25-9000 - http://www.bls.gov/soc/2010/soc250000.htm#25-9000]

Management Occupations

The IPEDS HR occupational category called "**Management Occupations**" is based on the occupational group in the 2010 Standard Occupational Classification (SOC) Manual with the same name ("**Management Occupations**"). Click on the following link for details on the SOC **"Management Occupations"** group (Major Group 11-0000): http://www.bls.gov/soc/2010/soc110000.htm.

Business and Financial Operations Occupations

The IPEDS HR occupational category called "**Business and Financial Operations Occupations**" is based on the occupational group in the 2010 Standard Occupational Classification (SOC) Manual with the same name ("**Business and Financial Operations Occupations**"). Click on the following link for details on the SOC "**Business and Financial Operations Occupations**" group (Major Group 13-0000): http://www.bls.gov/soc/2010/soc130000.htm.

Computer, Engineering, and Science Occupations

The IPEDS HR occupational category called "**Computer, Engineering, and Science Occupations**" is based on the following three occupational groups in the 2010 Standard Occupational Classification (SOC) Manual. (For details on the three SOC occupational groups, click on the links below.)

- **Computer and Mathematical Occupations**

[SOC Major Group 15-0000 - http://www.bls.gov/soc/2010/soc150000.htm]

- **Architecture and Engineering Occupations**

[SOC Major Group 17-0000 - http://www.bls.gov/soc/2010/soc170000.htm]

- **Life, Physical, and Social Science Occupations**

[SOC Major Group 19-0000 - http://www.bls.gov/soc/2010/soc190000.htm]

Community Service, Legal, Arts, and Media Occupations

The IPEDS HR occupational category called "**Community Service, Legal, Arts, and Media Occupations**" is based on the following three occupational groups in the 2010 Standard Occupational Classification (SOC) Manual. (For details on the three SOC occupational groups, click on the links below.)

- **Community and Social Service Occupations**

[SOC Major Group 21-0000 - http://www.bls.gov/soc/2010/soc210000.htm]

- **Legal Occupations**

[SOC Major Group 23-0000 - http://www.bls.gov/soc/2010/soc230000.htm]

- **Arts, Design, Entertainment, Sports, and Media Occupations**

[SOC Major Group 27-0000 - http://www.bls.gov/soc/2010/soc270000.htm]

Healthcare Practitioners and Technical Occupations

The IPEDS HR occupational category called "**Healthcare Practitioners and Technical Occupations**" is based on the occupational group in the 2010 Standard Occupational Classification (SOC) Manual with the same name ("**Healthcare Practitioners and Technical Occupations**"). Click on the following link for details on the SOC "**Healthcare Practitioners and Technical Occupations**" group (Major Group 29-0000): http://www.bls.gov/soc/2010/soc290000.htm.

Service Occupations

The IPEDS HR occupational category called "**Service Occupations**" is based on the following five occupational groups in the 2010 Standard Occupational Classification (SOC) Manual. (For details on the five SOC occupational groups, click on the links below.)

- **Healthcare Support Occupations**

[SOC Major Group 31-0000 - http://www.bls.gov/soc/2010/soc310000.htm]

- **Protective Service Occupations**

[SOC Major Group 33-0000 - http://www.bls.gov/soc/2010/soc330000.htm]

- **Food Preparation and Serving Related Occupations**

[SOC Major Group 35-0000 - http://www.bls.gov/soc/2010/soc350000.htm]

- **Building and Grounds Cleaning and Maintenance Occupations**

[SOC Major Group 37-0000 - http://www.bls.gov/soc/2010/soc370000.htm]

- **Personal Care and Service Occupations**

[SOC Major Group 39-0000 - http://www.bls.gov/soc/2010/soc390000.htm]

Sales and Related Occupations

The IPEDS HR occupational category called "**Sales and Related Occupations**" is based on the occupational group in the 2010 Standard Occupational Classification (SOC) Manual with the same name ("**Sales and Related Occupations**"). Click on the following link for details on the SOC "**Sales and Related Occupations**" group (Major Group 41-0000): http://www.bls.gov/soc/2010/soc410000.htm.

Office and Administrative Support Occupations

The IPEDS HR occupational category called "**Office and Administrative Support Occupations**" is based on the occupational group in the 2010 Standard Occupational Classification (SOC) Manual with the same name ("**Office and Administrative Support Occupations**"). Click on the following link for details on the SOC "**Office and Administrative Support Occupations**" group (Major Group 43-0000): http://bls.gov/soc/2010/soc430000.htm.

Natural Resources, Construction, and Maintenance Occupations

The IPEDS HR occupational category called "**Natural Resources, Construction, and Maintenance Occupations**" is based on the following three occupational groups in the 2010 Standard Occupational Classification (SOC) Manual. (For details on the three SOC occupational groups, click on the links below.)

- **Farming, Fishing, and Forestry Occupations**

[SOC Major Group 45-0000 - http://www.bls.gov/soc/2010/soc450000.htm]

- **Construction and Extraction Occupations**

[SOC Major Group 47-0000 - http://www.bls.gov/soc/2010/soc470000.htm]

- **Installation, Maintenance, and Repair Occupations**

[SOC Major Group 49-0000 - http://www.bls.gov/soc/2010/soc490000.htm]

Production, Transportation, and Material Moving Occupations

The IPEDS HR occupational category called "**Production, Transportation, and Material Moving Occupations**" is based on the following two occupational groups in the 2010 Standard Occupational Classification (SOC) Manual. (For details on the two SOC occupational groups, click on the links below.)

- **Production Occupations**

[SOC Major Group 51-0000 - http://www.bls.gov/soc/2010/soc510000.htm]

- **Transportation and Material Moving Occupations**

[SOC Major Group 53-0000 - http://www.bls.gov/soc/2010/soc530000.htm]

Graduate Assistants

For IPEDS purposes, report graduate assistants in the part-time part(s) only.

Listed below are the descriptions of the graduate assistant categories:

- **Graduate Assistant - Teaching** [SOC Detailed Occupation 25-1191 - http://www.bls.gov/soc/2010/soc251191.htm**:**

Assist faculty or other instructional staff in postsecondary institutions by performing teaching or teaching-related duties, such as teaching lower level courses, developing teaching materials, preparing and giving examinations, and grading examinations or papers. Graduate teaching assistants must be enrolled in a graduate school program. Graduate assistants who primarily perform non-teaching duties, such as research, should be reported in the occupational category related to the work performed. Excludes "Teacher Assistants" (25-9041).

Illustrative examples: *Teaching Fellow, Graduate Student Instructor*

•**Graduate Assistant - Research**

Persons whose specific assignments customarily are made for the purpose of **conducting research**. Regardless of title, academic rank, or tenure status, these employees formally spend the majority of their time conducting research.

NOTE: If your institution has graduate assistants in the following categories, they should be placed in the appropriate graduate assistant categories below. For example, a graduate assistant updating websites in the computer department should be considered a graduate assistant in the IPEDS HR category called, "Computer, Engineering, and Science Occupations."

- **Graduate Assistant - Management** (refer to the "Management Occupations" category above for more information)
- **Graduate Assistant - Business and Financial Operations** (refer to the "Business and Financial Operations Occupations" category above for more information)
- **Graduate Assistant - Computer, Engineering, and Science** (refer to the "Computer, Engineering, and Science Occupations" category above for more information)
- **Graduate Assistant - Community Service, Legal, Arts, and Media** (refer to the "Community Service, Legal, Arts, and Media Occupations" category above for more information)
- **Graduate Assistant - Library and Instructional Support** (refer to the following titles above for more information: Archivists, Curators, and Museum Technicians; Librarians; Library Technicians; and "Other Teachers and Instructional Support Staff") [NOTE: The previous graduate assistant category called, "Library and Non-postsecondary Teaching" was changed to the current graduate assistant category called "Library and Instructional Support" for clarity on 10/31/12.]
- **Graduate Assistant - Healthcare Practitioners and Technical** (refer to the "Healthcare Practitioners and Technical Occupations" category above for more information)

(NOTE: Public Service is not included in the above categories as recommended by the IPEDS HR Technical Review Panel members.)

New Hires

Degree-granting institutions and related administrative offices that have ***15 or MORE full-time staff*** AND responded "Yes" to the screening question about full-time permanent new hires will be required to complete Part H. Part H has slightly different reporting criteria from the other parts. In Part H, report the number of **full-time permanent staff who were included on the payroll of the institution between July 1 and October 31, 2012 either for the first time (new to the institution) or after a break in service AND who were still on the payroll of the institution as of November 1, 2012**. Do not include as new hires persons who have returned from sabbatical leave OR full-time Postsecondary Staff who are working less-than-9-month contracts.

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Salaries

A salary worksheet was added to collect the number of full-time, non-medical, instructional staff separately by gender and academic rank for the following contracts: 9-month contract, 10-month contract, 11-month contract, and 12-month contract. Salary outlays of full-time, non-medical, instructional staff are also collected by gender and academic rank. A column was added to the survey after the salary outlays column to collect the number of months covered by the salary outlays. (This number will be used to calculate a weighted monthly average salary.)

To assist data reporters in determining the number of hours covered, a worksheet is provided in the data collection system that collects the number of staff on 9-month contracts, 10-month contracts, 11-month contracts, and 12-month contracts, by gender and academic rank. For each gender and academic rank category, the system would then calculate: (1) the total number of staff reported (i.e., the sum of the values entered for each contract length), and (2) the total number of months covered (i.e., the sum of the staff reported for each contract length multiplied by the number of months in the contract).

Additional stipends for administrative, managerial or other responsibilities should NOT be included in the salary calculation.

Salary outlays are also collected for full-time, non-medical, non-instructional staff by occupational category on a separate screen. (The number of full-time, non-medical, non-instructional staff by occupational category is carried forward from Part A.) These totals are not disaggregated by race/ethnicity and gender.

NOTE: The following instruction about staff on sabbatical leave and staff who are on leave was added on 10/31/12 for clarity; however, the instruction has historically been included in the IPEDS HR instructions:

When reporting staff on sabbatical leave and staff who are on leave, but remain on the payroll of the institution, report such persons at their regular salaries even though the staff may be receiving a reduced annuity while on leave.

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Medical School Staff [applicable to 4-year and above degree-granting institutions only]

The medical school screens are applicable to institutions with M.D. and/or D.O. programs only.
All staff affiliated with (housed in or under the authority of) the medical school should be reported with the medical school.
Example: If an institution's medical school staff are housed with the institution's staff in other health-related disciplines (e.g., dentistry, veterinary medicine, nursing, dental hygiene, etc.), the institution should report both sets of staff in the medical school part and list the other health-related disciplines in the comment box on the medical school page(s) in the data collection system.
Staff that are in health disciplines that are **NOT** considered part of a medical school must be reported on the non-medical school pages.

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Summary of Parts

(NOTE: In odd-numbered years (e.g., 2011-12), the reporting of data by race/ethnicity and gender is required while in even-numbered years (e.g., 2012-13), the reporting of data by race/ethnicity and gender is optional. Data are also collected by medical school status for 4-year and above degree-granting institutions only.)

Listed below is a summary of each part in this HR component.

- **Part A - *Full-time instructional staff:*** Collects the number of full-time instructional staff by tenure status and academic rank. Also, for the "Instruction" function only, the data are also collected by the following categories: Exclusively credit; Exclusively not-for-credit; and Combined credit/not-for-credit.
- **Part B - *Full-time non-instructional staff:*** Collects the number of full-time non-instructional staff by occupational category. Data are also collected for some full-time non-instructional staff by tenure status.
  Part C - *Total number of full-time staff:* Automatically sums the data reported in Part A and Part B.
- **Part D - *Part-time staff:*** Collects the number of part-time staff by occupational category.
- **Part E - *Part-time staff:*** Collects the number of part-time staff by occupational category and by tenure status for some occupational categories. For the "Instruction" function only, the data are also collected by the following categories: Exclusively credit; Exclusively not-for-credit; and Combined credit/not-for-credit.
- **Part F - *Part-time staff:*** Automatically sums the data reported in Part D and Part E.
- **Part G - *Salary Worksheet for full-time, non-medical, instructional staff* and *Salary Outlays for full-time, non-medical, instructional staff* -** Collects the number of full-time, non-medical, instructional staff by: 9-month contract, 10-month contract, 11-month contract, and 12-month contract. Also, collects ***salary outlays for full-time, non-medical, instructional staff***.
- **Part G - *Salary Outlays for full-time, non-medical, non-instructional staff* -** Collects salary outlays for full-time, non-medical, non-instructional staff by occupational category.
- **Part H - *Number of newly hired full-time permanent staff* -** Collects the number of newly hired full-time permanent instructional staff by tenure status. Also, collects the number of newly hired full-time permanent non-instructional staff by occupational category.

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Glossary

date: 12/11/2012

Term	Definition
Adjunct faculty	Non-tenure track faculty serving in a temporary or auxiliary capacity to teach specific courses on a course-by-course basis. Includes both faculty who are hired to teach an academic degree-credit course and those hired to teach a remedial, developmental, or ESL course; whether the latter three categories earn college credit is immaterial. Excludes regular part-time faculty (who, unlike adjuncts are not paid on a course-by-course basis), graduate assistants, full-time professional staff of the institution who may teach individual courses (such as a dean or academic advisor), and appointees who teach non-credit courses exclusively.
American Indian or Alaska Native (new definition)	A person having origins in any of the original peoples of North and South America (including Central America) who maintains cultural identification through tribal affiliation or community attachment.
Annual contract	An annually-renewable contract or employment agreement that is in effect for a stated annual period within one year of execution, and may be equal to a period of 365 days, or a standard academic year, or the equivalent. Does not include contracts for partial year periods such as a single semester, quarter, term, block, or course.
Archivists, Curators, and Museum Technicians	An occupational category based on the broad occupation in the 2010 Standard Occupational Classification (SOC) Manual called "Archivists, Curators, and Museum Technicians." For detailed information, refer to the following website: http:// www.bls.gov/soc/2010/soc254010.htm.
Asian (new definition)	A person having origins in any of the original peoples of the Far East, Southeast Asia, or the Indian Subcontinent, including, for example, Cambodia, China, India, Japan, Korea, Malaysia, Pakistan, the Philippine Islands, Thailand, and Vietnam.
Black or African American (new definition)	A person having origins in any of the black racial groups of Africa.
Business and Financial Operations Occupations	An occupational category based on the major group in the 2010 Standard Occupational Classification (SOC) Manual called "Business and Financial Operations Occupations." For detailed information refer to the following website: http://www.bls.gov/soc/2010/soc130000.htm.
Casual employees	Persons who are hired to work during peak times such as those that help at registration time or those that work in the bookstore for a day or two at the start of a session.
Community Service, Legal, Arts, and Media Occupations	An occupational category based on the following three major groups in the 2010 Standard Occupational Classification (SOC) Manual: 1) Community and Social Service Occupations (http://www.bls.gov/soc/2010/soc210000.htm); 2) Legal Occupations (http://www.bls.gov/soc/2010/soc230000.htm); and 3) Arts, Design, Entertainment, Sports, and Media Occupations (http://www.bls.gov/soc/2010/soc270000.htm).
Computer, Engineering, and Science Occupations	An occupational category based on the following three major groups in the 2010 Standard Occupational Classification (SOC) Manual: 1) Computer and Mathematical Occupations (http://www.bls.gov/soc/2010/soc150000.htm); 2) Architecture and Engineering Occupations (http://www.bls.gov/soc/2010/soc170000.htm); and 3) Life, Physical, and Social Science Occupations (http://www.bls.gov/soc/2010/soc190000.htm).
Full-time staff (employees)	As defined by the institution. The type of appointment at the snapshot date determines whether an employee is full time or part time. The employee's term of contract is not considered in making the determination of full or part time.
Graduate Assistants (Research)	An occupational category used to classify graduate assistants whose specific assignments customarily are made for the purpose of conducting research.
Graduate Assistants (Teaching)	An occupational category based on the detailed occupation in the 2010 Standard Occupational Classification (SOC) Manual called "Graduate Assistant - Teaching" (SOC code 25-1191). For detailed information, refer to the following website: http:// www.bls.gov/soc/2010/soc251191.htm.
Healthcare Practitioners and Technical Occupations	An occupational category based on the major group in the 2010 Standard Occupational Classification (SOC) Manual called "Healthcare Practitioners and Technical Occupations." For detailed information refer to the following website: http://www.bls.gov/soc/2010/soc290000.htm.
Hispanic or Latino (new definition)	A person of Cuban, Mexican, Puerto Rican, South or Central American, or other Spanish culture or origin, regardless of race.
Instructional Staff	An occupational category that consists of the following two functions: 1) "Instruction" only and 2) "Instruction combined with research and/or public service."
Less-than-annual contract	A contract or employment agreement that is in effect for a partial year period of less than 365 days, or less than a standard academic year or the equivalent. Includes contracts for partial year periods such as a single semester, quarter, term, block, or course.
Librarians	An occupational category based on the broad occupation in the 2010 Standard Occupational Classification (SOC) Manual called "Librarians." For detailed information, refer to the following website: http:// www.bls.gov/soc/2010/soc254020.htm.
Librarians, Curators, and Archivists	An occupational category based on the following three broad occupations in the 2010 Standard Occupational Classification (SOC) Manual: 1) Librarians (http://www.bls.gov/soc/2010/soc254020.htm); 2) Archivists, Curators, and Museum Technicians (http://www.bls.gov/soc/2010/soc254010.htm); and 3) Library Technicians (http://www.bls.gov/soc/2010/soc254030.htm).
Library Technicians	An occupational category based on the broad occupation in the 2010 Standard Occupational Classification (SOC) Manual called "Library Technicians." For detailed information, refer to the following website: http:// www.bls.gov/soc/2010/soc254030.htm.
Management Occupations	

	An occupational category based on the major group in the 2010 Standard Occupational Classification (SOC) Manual called "Management Occupations." For detailed information refer to the following website: http://www.bls.gov/soc/2010/soc110000.htm.
Medical school staff	Staff employed by or staff working in the medical school (Doctor of Medicine [M.D.] and/or Doctor of Osteopathic Medicine [D.O.]) component of a postsecondary institution or in a free standing medical school. Does not include staff employed by or employees working strictly in a hospital associated with a medical school or those who work in health or allied health schools or departments such as dentistry, veterinary medicine, nursing or dental hygiene unless the health or allied health schools or departments are affiliated with (housed in or under the authority of) the medical school.
Multi-year contract	A contract or employment agreement that is in effect for more than one year (e.g., more than 365 days) where subsequent years of the contract may be contingent upon other factors such as the appropriation of funds. The renewal period of a multi-year contract is not on an annual basis (e.g., a 5-year multi-year contract is renewed every 5 years NOT annually).
Native Hawaiian or Other Pacific Islander (new definition)	A person having origins in any of the original peoples of Hawaii, Guam, Samoa, or other Pacific Islands.
Natural Resources, Construction, and Maintenance Occupations	An occupational category based on the following three major groups in the 2010 Standard Occupational Classification (SOC) Manual: 1) Farming, Fishing, and Forestry Occupations (http://www.bls.gov/soc/2010/soc450000.htm); 2) Construction and Extraction Occupations (http://www.bls.gov/soc/2010/soc470000.htm); and 3) Installation, Maintenance, and Repair Occupations (http://www.bls.gov/soc/2010/soc490000.htm).
New hires	Persons who were hired for full-time permanent employment either for the first time (new to the institution) or after a break in service between July 1st and October 31st of the survey year AND who were still on the payroll of the institution as of the same survey year. Does not include persons who have returned from sabbatical leave OR full-time Postsecondary Staff who are working less-than-9-month contracts.
Nonresident alien	A person who is not a citizen or national of the United States and who is in this country on a visa or temporary basis and does not have the right to remain indefinitely.
Not on tenure track	Personnel positions that are considered non-tenure earning positions.
Office and Administrative Support Occupations	An occupational category based on the major group in the 2010 Standard Occupational Classification (SOC) Manual called "Office and Administrative Support Occupations." For detailed information refer to the following website: http://www.bls.gov/soc/2010/soc430000.htm.
Other Teachers and Instructional Support Staff	An occupational category based on the following three minor groups in the 2010 Standard Occupational Classification (SOC) Manual: 1) Pre-school, Primary, Secondary, and Special Education School Teachers (http://www.bls.gov/soc/2010/ soc250000.htm#25-2000); 2) Other Teachers and Instructors (http://www. bls.gov/soc/2010/soc250000.htm#25-3000); and 3) Other Education, Training, and Library Occupations (http:// www.bls.gov/soc/2010/soc250000.htm#25-9000).
Part-time staff (employees)	As determined by the institution. The type of appointment at the snapshot date determines whether an employee is full time or part time. The employee's term of contract is not considered in making the determination of full or part time. Casual employees (hired on an ad-hoc basis or occasional basis to meet short-term needs) and students in the College Work-Study Program (CWS) are not considered part-time staff.
Postsecondary Teachers	An occupational category that consists of the following four functions: 1) "Instruction" only; 2) "Instruction combined with research and/or public service;" 3) "Research;" and 4) "Public Service."
Postsecondary Teachers (Instruction (only))	An occupational category used to classify persons whose specific assignments customarily are made for the purpose of providing instruction or teaching. Regardless of title, academic rank, or tenure status, these employees formally spend the majority of their time providing instruction or teaching.
Postsecondary Teachers (Instruction combined with research and/or public service)	An occupational category used to classify persons for whom it is not possible to differentiate between instruction or teaching, research, and public service because each of these functions is an integral component of his/her regular assignment. Regardless of title, academic rank, or tenure status, these employees formally spend the majority of their time providing instruction, research, and/or public service.
Postsecondary Teachers (Public Service)	An occupational category used to classify persons whose specific assignments customarily are made for the purpose of carrying out public service activities such as agricultural extension services, clinical services, or continuing education. Regardless of title, academic rank, or tenure status, these employees formally spend the majority of their time carrying out public service activities. (This category includes employees with a public service assignment regardless of the location of the assignment (e.g., in the field rather than on campus).
Postsecondary Teachers (Research)	An occupational category used to classify persons whose specific assignments customarily are made for the purpose of conducting research. Regardless of title, academic rank, or tenure status, these employees formally spend the majority of their time conducting research.
Production, Transportation, and Material Moving Occupations	An occupational category based on the following two major groups in the 2010 Standard Occupational Classification (SOC) Manual: 1) Production Occupations (http://www.bls.gov/soc/2010/soc510000.htm) and 2) Transportation and Material Moving Occupations (http://www.bls.gov/soc/2010/soc530000.htm).
Race/ethnicity unknown	The category used to report students or employees whose race and ethnicity are not known.
Sales and Related Occupations	An occupational category based on the major group in the 2010 Standard Occupational Classification (SOC) Manual called "Sales and Related Occupations." For detailed information refer to the following website: http://www.bls.gov/soc/2010/soc410000.htm.
Service Occupations	

	An occupational category based on the following five major groups in the 2010 Standard Occupational Classification (SOC) Manual: 1) Healthcare Support Occupations (http://www.bls.gov/soc/2010/soc310000.htm); 2) Protective Service Occupations (http://www.bls.gov/soc/2010/soc330000.htm); 3) Food Preparation and Serving Related Occupations (http://www.bls.gov/soc/2010/soc350000.htm); 4) Building and Grounds Cleaning and Maintenance Occupations (http://www.bls.gov/soc/2010/soc370000.htm); and 5) Personal Care and Service Occupations (http://www.bls.gov/soc/2010/soc390000.htm).
Tenure	Status of a personnel position with respect to permanence of the position.
Tenure track	Personnel positions that lead to consideration for tenure.
White (new definition)	A person having origins in any of the original peoples of Europe, the Middle East, or North Africa.

Human Resources

Click one of the following questions to view the answer.

General

1) For the IPEDS HR survey component that is applicable to degree-granting institutions, what happened to the references to the IPEDS HR sections called: Employees by Assigned Position (EAP), Salaries, and Fall Staff?

2) Why has NCES changed the occupational categories in the IPEDS HR survey?

3) My institution has staff for which gender is unknown. Since there is no place to report "gender unknown" on the IPEDS data collection screens, how should we report these individuals?

4) How do I know if I must complete the Equal Employment Opportunity Commission (EEOC) EEO-1 survey form?

5) What is the relationship between the EEO-6 form and IPEDS?

6) How often are data for the IPEDS HR survey collected?

7) What is the period of reporting for the HR component?

8) What type of staff should be included in the IPEDS HR component?

9) What type of staff should *NOT* be included in the IPEDS HR component?

10) Should instructional staff who provide instruction in credit and/or non-credit courses be included in the HR component?

11) Should I include in the IPEDS survey a professor who teaches courses via distance education and who is not based out of the college?

12) Do we include guest lecturers when we report to IPEDS?

13) Should I include full-time staff who are paid by another entity or who are paid indirectly by my institution?

14) How do we handle individuals who are employees and also taking courses?

15) What do you mean by "medical school" staff?

16) How do I know if my data are consistent across certain parts?

17) Can I change my data after completing a part?

18) Why do I keep receiving error messages about missing data when I have entered all necessary data for my institution?

19) Who should I report as "Without faculty status"?

20) If a person currently employed by an institution accepts a new full-time position within the institution, is that person considered a new hire?

21) How should full-time instructional staff on a "confidential payroll" (where salary is unavailable) be handled?

22) Are salary data collected from all institutions?

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IPEDS and SOC

1) Why has NCES changed the occupational categories in the IPEDS HR survey?

2) What is the SOC?

3) What is the purpose of the Standard Occupational Classification (SOC) system?

4) How are occupations classified in the SOC?

5) How is the SOC structured?

6) Is there additional information on classifying and coding supervisors and managers?

7) Which staff comprise the new Postsecondary Teachers category?

8) How is data on library-related occupations collected?

9) The certified public accountant (CPA) in my office has spent the past 10 years working soley in that capacity; however, recently, the CPA was asked to split half his time peforming his regular, on-going duties as a CPA and the other half of his time preparing timecards and other duties generally performed py payroll clerks. What occupational category should I place this person in the IPEDS HR survey?

10) My institution has a graduate assistant who assists with updating the website for the computer department. How should I code this person in IPEDS?

11) Where can I find definitions of the 2010 SOC occupations?

12) Where can I find additional information about the SOC system?

13) When will the next SOC revision take place?

14) Is there a summary of resources that relate to the new IPEDS occupational categories and the 2010 SOC?

15) For IPEDS reporting, are institutions required to code and report all occupations at the lowest, detailed SOC level?

16) Can the previous IPEDS primary function/occupational activity categories be mapped to the new IPEDS occupational categories?

Answers:

General

1) For the IPEDS HR survey component that is applicable to degree-granting institutions, what happened to the references to the IPEDS HR sections called: Employees by Assigned Position (EAP), Salaries, and Fall Staff?

Beginninng with the 2012-13 IPEDS HR survey, the references to EAP, Salaries, and Fall Staff are no longer used; however, parts are still used. Please refer to the parts for the 2012-13 IPEDS HR survey carefully since they may have changed from previous years.

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2) Why has NCES changed the occupational categories in the IPEDS HR survey?

The IPEDS HR survey was changed to comply with the requirement to align IPEDS HR reporting with the 2010 Standard Occupational Classification (SOC) system. Also, prior to 2012-13, most of the occupational categories and corresponding definitions in the IPEDS HR survey and its predecessor called the *Higher Education General Information Survey (HEGIS)* remained basically the same for over two decades. (The 2010 SOC reflects changes in the workforce over the last decade.)

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3) My institution has staff for which gender is unknown. Since there is no place to report "gender unknown" on the IPEDS data collection screens, how should we report these individuals?

These individuals are still to be reported to IPEDS, even though their gender is unknown. It is up to the institution to decide how best to handle reporting individuals whose gender is unknown. However, a common method used is to allocate the individuals with gender unknown based on the known proportion of men to women for staff.

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4) How do I know if I must complete the Equal Employment Opportunity Commission (EEOC) EEO-1 survey form?

Since the EEO-1 survey form is conducted by EEOC, you must contact EEOC directly to find out about their survey reporting requirements. For more information about EEO-1 reporting, please refer to the following EEOC website, which includes contact information: http://www.eeoc.gov/eeo1survey/index.html.

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5) What is the relationship between the EEO-6 form and IPEDS?

The Equal Employment Opportunity Commission (EEOC) previously collected data on the EEO-6 form. In 1993, IPEDS took over the collection of the EEO-6 data. These data are made available to the EEOC and to the Office for Civil Rights.

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6) How often are data for the IPEDS HR survey collected?

1. In **even-numbered years** such as Fall 2012, the reporting of race/ethnicity data in the IPEDS HR survey is optional; however, the reporting of all other applicable data in the IPEDS survey is required. (During even-numbered years, IPEDS simply serves as a reporting mechanism for those institutions that are required to provide race/ethnicity data annually to their states or to other agencies.)
2. In **odd-numbered years** such as Fall 2011, the reporting of all applicable data (inlcuding race/ethnicity) in the IPEDS HR survey is required.

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7) What is the period of reporting for the HR component?

The period of reporting is intended to provide a snapshot of your human resources/payroll data at one point in the fall.

- With the exception of the part that is collected on full-time permanent new hires from degree-granting institutions that have 15 or more full-time staff, institutions should report persons on the payroll of the institution as of **November 1, 2012** in the 2012-13 IPEDS HR component. (For more details on who to include and exclude from the HR component, refer to the next two FAQs or refer to the sections of the complete instructions called "Who to include in this report" and "Who NOT to include in this report.")
- The part that is collected on new hires from degree-granting institutions that have 15 or more full-time staff has the following reporting requirement: includes full-time permanent new hires on the payroll of the institution between **July 1 and October 31, 2012** either for the *first time (new to the institution)* or *after a break in service* AND who are still on the payroll of the institution as November 1, 2012. For additional details about new hires, refer to the complete set of instructions.

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8) What type of staff should be included in the IPEDS HR component?

The following types of staff should be included in the HR component:

- Staff who are on sabbatical leave and staff who are on leave, but remain on the payroll.
- Postsecondary Teachers who are hired to temporarily replace Postsecondary Teachers who are on sabbatical leave or on leave without pay.
- "Visiting" Postsecondary Teachers who are paid by your institution.
- Adjunct Postsecondary Teachers who are employed on a full-time or on a part-time basis in the occupational category for which they were hired.

- Staff at off-campus centers associated with the campus covered by this report. (Do not include staff who work at branch campuses located in a foreign country.)

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9) What type of staff should *NOT* be included in the IPEDS HR component?

The following types of employees should *NOT* be included in the HR component:

- Staff on leave without pay.
- Staff in the military or religious orders who are not paid by your institution.
- Staff whose services are contracted by or donated to the institution.
- Casual employees (hired on an ad-hoc or occasional basis to meet short-term needs).
- Undergraduate students.
- Students in the College Work-Study Program.
- Staff who work strictly in hospitals associated with medical schools.

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10) Should instructional staff who provide instruction in credit and/or non-credit courses be included in the HR component?

Yes. Instructional staff who provide instruction in credit and/or non-credit courses/activities should be included in the HR component.

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11) Should I include in the IPEDS survey a professor who teaches courses via distance education and who is not based out of the college?

Staff at off-campus centers/sites associated with the campus covered by this report should be included in the HR component; however, staff who work at branch campuses located in a foreign country should **NOT** be included in the HR component. Also, the staff must be on the payroll of the institution.

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12) Do we include guest lecturers when we report to IPEDS?

If a guest lecturer is hired by the institution and placed on the institution's payroll then the person should be included in the HR component. However, guest lecturers typically are given honoraria or lecture fees and thus are not paid through the institution's payroll accounts.

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13) Should I include full-time staff who are paid by another entity or who are paid indirectly by my institution?

No. Include only paid employees of your institution, recognizing that this may undercount the number of staff.

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14) How do we handle individuals who are employees and also taking courses?

1 - If they are student workers (e.g., College-Work study), exclude them from the HR component.
2 - If they are employed as graduate assistants to assist in the classroom or laboratory or to do research, include them as part-time employees in the graduate assistants category.
3 - If they are employed in regular jobs, either full time or part time, include them according to their primary function/occupational activity.

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15) What do you mean by "medical school" staff?

Staff employed by or staff working in the medical school (M.D. and/or D.O.) component of a postsecondary institution or in a freestanding medical school. Does not include staff employed by or employees working strictly in a hospital associated with a medical school or those who work in health or allied health schools or departments such as dentistry, veterinary medicine, nursing, or dental hygiene unless the health or allied health schools or departments are affiliated with (housed in or under the authority of) the medical school. (The medical school pages are applicable to institutions with M.D. and/or D.O. programs only.)

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16) How do I know if my data are consistent across certain parts?

There are internal edit checks in place to ensure consistency. Also, some cells will be pre-populated from data in other parts to help ensure consistent reporting.

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17) Can I change my data after completing a part?

Yes. Data may be changed after completing any part. Once edit checks are run, errors may be detected that will require users to revise data in one part to agree with what is reported in another part. Data cannot be locked until all errors are resolved.

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18) Why do I keep receiving error messages about missing data when I have entered all necessary data for my institution?

If a displayed screen is not applicable to your institution, you must enter at least one zero in a field on that screen. If you are still unable to resolve the edit involving missing data, please contact the IPEDS Help Desk at 1-877-225-2568 for further assistance.

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19) Who should I report as "Without faculty status"?

While institutions may use different designations of who is functioning as "faculty," there is generally some designation of whether or not an employee has faculty status. Report employees with faculty status in either the Tenured, On Tenure track, or Not on tenure track column by occupational category. Institutions may also employ individuals in the various occupational categories who do not have or who are not eligible to have faculty status. Report these individuals in the Without faculty status category. For example, an individual hired as a Computer Engineer without tenure eligibility should be reported in the IPEDS occupational category of "Computer, Engineering, and Science Occupations" in the Without Faculty Status category. Postdoctoral research associate, because they do not have faculty status, would be reported in the Without faculty status category.

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20) If a person currently employed by an institution accepts a new full-time position within the institution, is that person considered a new hire?

NO. The currently employed person is not considered a new hire. New hires are full-time permanent staff on the payroll of the institution between July 1 and October 31, 2012 either for the first time (new to the institution) or after a break in service AND who are still on the payroll of the institution as November 1, 2012. Also, new hires do not include persons who have returned from sabbatical leave or full-time Postsecondary Staff who are working less-than-9-month contracts.

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21) How should full-time instructional staff on a "confidential payroll" (where salary is unavailable) be handled?

Make the best estimate of the salary of the full-time instructional staff.

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22) Are salary data collected from all institutions?

No. Salary data are collected from degree-granting institutions only, unless one or more of the following are true:

- All instructional staff are employed on a part time basis.
- All instructional staff are military personnel.
- All instructional staff contribute their services (e.g., are members of a religious order).
- All instructional staff teach pre-clinical or clinical medicine.

All applicable institutions are required to complete the Salaries section annually.

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IPEDS and SOC

1) Why has NCES changed the occupational categories in the IPEDS HR survey?

The IPEDS HR survey was changed to comply with the requirement to align IPEDS HR reporting with the 2010 Standard Occupational Classification (SOC) system. Also, prior to 2012-13, most of the occupational categories and corresponding definitions in the IPEDS HR survey and its predecessor called the *Higher Education General Information Survey (HEGIS)* remained basically the same for over two decades. (The 2010 SOC reflects changes in the workforce over the last decade.)

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2) What is the SOC?

The Standard Occupational Classification system, or SOC, is designed to reflect the current occupational structure of the United States.

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3) What is the purpose of the Standard Occupational Classification (SOC) system?

The SOC system is used by Federal statistical agencies to classify workers and jobs into occupational categories for the ***purpose*** of collecting, calculating, analyzing, or disseminating data. All Federal agencies that publish occupational data for statistical purposes are required to use the SOC in order to increase data comparability.

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4) How are occupations classified in the SOC?

Occupations in the SOC are classified based on work performed and, in some cases, on the skills, education, and/or training needed to perform the work at a competent level.
[The previous statement relates to the SOC Classification Principle #2. There are nine Classification Prnciples in total and they form the basis on which the SOC system is structured. The previous SOC manual, which was the *2000 SOC Manual*, had a similar classification principle, which also included "licensing" and "credentials;" however, licensing and credentials are no longer included in the updated principle. For a complete list of the 2010 SOC Classification Principles, refer to the following link: http://www.bls.gov/soc/soc_2010_class_prin_cod_guide.pdf.]

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5) How is the SOC structured?

The SOC is a tiered occupational classification system with four levels: major group, minor group, broad occupation, and detailed occupation. The 23 major groups are broken down into 97 minor groups, followed by 461 broad occupations, and finally 840 detailed occupations.

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6) Is there additional information on classifying and coding supervisors and managers?

For additional information on classifying and coding supervisors and managers, refer to the "2010 SOC Classification Principles" and the "2010 SOC Coding Guidelines," which are listed in the 2012-13 IPEDS HR instructions.

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7) Which staff comprise the new Postsecondary Teachers category?

Beginning with the 2012-13 IPEDS HR component, the new term *Postsecondary Teachers* was introduced. Non-degree-granting institutions report Postsecondary Teachers in the single category called "*Postsecondary Teachers*" while degree-granting institutions report Postsecondary Teachers separately by the following functions:

- Instruction
- Instruction combined with research and/or public service
- Research
- Public Service

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8) How is data on library-related occupations collected?

Beginning with the 2012-13 IPEDS HR component, non-degree-granting institutions report library-related occupations in the single category called "*Librarians, Curators, and Archivists*." Degree-granting institutions that have 15 or more full-time staff members report library-related occupations separately as:

- Archivists, Curators, and Museum Technicians
- Librarians
- Library Technicians

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9) The certified public accountant (CPA) in my office has spent the past 10 years working soley in that capacity; however, recently, the CPA was asked to split half his time peforming his regular, on-going duties as a CPA and the other half of his time preparing timecards and other duties generally performed py payroll clerks. What occupational category should I place this person in the IPEDS HR survey?

First, the scenario described in this case is similar to the SOC Coding Guideline #2, which states, when workers in a single job could be coded in more than one occupation, they should be coded in the occupation that requires the highest level of skill. If there is no measurable difference in skill requirements, workers should be coded in the occupation in which they spend the most time. There are six SOC Coding Guidelines and they are intended to assist users in consistently assigning SOC codes and titles to survey responses and in other coding activities. For a complete list of the 2010 SOC Coding Guidelines, refer to the following link: http://www.bls.gov/soc/soc_2010_class_prin_cod_guide.pdf.
The answer to the above question would be the IPEDS HR occupational category of "Business and Financial Operations Occupations" for the following reasons.

- The occupation of CPA requires a higher level of skill than the occupation of payroll clerk; therefore, the person in question would fall under the SOC Detailed occupation of "Accountants and Auditors" (SOC code **13**-2011), which falls under the SOC Major group of "Business and Financial Operations Occupations" (SOC code **13-**0000).
- In determining the equivalent IPEDS HR occupational category, refer to the IPEDS/SOC crosswalk, where you will see that the SOC Major group of Business and Financial Operations Occupations" has been crosswalked to the 2012-13 IPEDS HR Major Occupational Category of "Business and Financial Operations Occupations."

[NOTE: For IPEDS purposes, there is no need to manually code CPA to "Accountants and Auditors" because the data are not collected in IPEDS at that level.]

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10) My institution has a graduate assistant who assists with updating the website for the computer department. How should I code this person in IPEDS?

Since this person is a graduate assistant updating websites in the computer department, include this person as a graduate assistant in the IPEDS HR category called, "Computer, Engineering, and Science Occupations."

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11) Where can I find definitions of the 2010 SOC occupations?

A pdf version of the 2010 SOC definitions can be found at the following website: http://www.bls.gov/soc/soc_2010_definitions.pdf. A link to the Excel version of the definitions can be found at the following SOC homepage under the category called "2010 SOC, Downloadable Materials:" http://www.bls.gov/soc. While the SOC system is a four-level tiered system, SOC definitions only exist at the lowest occupational level, which is known as the "detailed occupation" level.

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12) Where can I find additional information about the SOC system?

Refer to the following SOC homepage at: http://www.bls.gov/soc.

- A hardcopy of the English version of the *2010 SOC Manual* can also be purchased from the following website: http://www.ntis.gov/products/soc.aspx.
- The Spanish version of the *2010 SOC Manual* is only available online and can be found at: http://www.bls.gov/soc/soc_2010_Spanish_Version.pdf.

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13) When will the next SOC revision take place?

The next major review and revision of the SOC is expected to begin in 2013 in order to produce a 2018 version of the SOC.

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14) Is there a summary of resources that relate to the new IPEDS occupational categories and the 2010 SOC?

A newly developed IPEDS HR/SOC Information Center can be found at: http://nces.ed.gov/ipeds/resource/soc.asp. Additional items will be added to this resource page as they become available. For example, a tool is expected to be added that will include the 2010 SOC codes, titles, definitions, illustrative examples along with the corresponding IPEDS occupational categories.

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15) For IPEDS reporting, are institutions required to code and report all occupations at the lowest, detailed SOC level?

IPEDS does not require institutions to manually code and report all occupations at the detailed SOC level. Most of the occupational data in IPEDS will be collected at a higher level (e.g., major level); however, there are a few instances where data will be collected at a lower level (e.g., detailed) such as Postsecondary Teachers. For IPEDS purposes, institutions should report their employees in the categories defined in the IPEDS HR survey. For example, a College President would most likely fall under the detailed SOC occupation of "Education Administrators, Postsecondary" (**11**-9033) where the first two-digits (**11**) of the SOC code represent the SOC "major group" in this example. Based on the 2012-13 IPEDS HR survey and the 2010 SOC crosswalk at http://nces.ed.gov/ipeds/resource/download/IPEDS_HR_2012-13_and_2010_SOC_Crosswalk.pdf, the SOC code of "**11-0000**" corresponds to the SOC major group of "Management Occupations," which is cross walked to the IPEDS HR "Management Occupations" category. Consequently, for IPEDS purposes, the College President should be placed in the "Management Occupations" category in the HR survey. [IPEDS does not require institutions to manually code the College President at the detailed level.]

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16) Can the previous IPEDS primary function/occupational activity categories be mapped to the new IPEDS occupational categories?

In most cases, no. Since the detailed occupations in the 2010 SOC with *similar job duties, and in some cases skills, education, and/or training, are grouped together*, it was necessary for IPEDS to conform to the same methodology. [Please keep in mind that the occupational data to be reported in the 2012-13 IPEDS HR survey are reported at a higher level (e.g., major level) in most cases; however, the same general premise applies.] Consequently, many categories such as "technical and paraprofessional" and "other professionals (support/service)" can no longer be used. For example, for the 2011-12 IPEDS HR survey, "Dietitians and Nutritionists" were included in the "Other Professional (support/service) category while "Dietetic Technicians" were included in the Technical and Paraprofessionals" category. In the 2012-13 IPEDS HR survey, "Dietitians and Nutritionists" and "Dietetic Technicians" are included in the SAME major occupational category called "Healthcare Practitioners and Technical Occupations." Additionally, most of the occupational categories in the previous IPEDS HR survey included definitions at the "major" level; however, the 2012-13 IPEDS HR occupational categories do not include definitions at the "major" level. This change was necessary to conform to the SOC system, which only includes definitions at the detailed (e.g., lowest) level.

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Human Resources for degree-granting institutions and related administrative offices that have 15 or more full-time staff and a tenure system

Edit specifications for the 2012-13 IPEDS Web-Based Data Collection
Human Resources (HR) Component

Applicable to degree-granting institutions and related administrative offices with 15 or more full-time staff and a tenure system

Note: The specifications in this document apply to the institutions listed above and related administrative offices. Some sections and parts may not apply to your particular institution. Please read the specifications carefully to determine which sections and/or parts apply to your institution.

All screens must be completed in order to lock the survey.

- Screening Questions
- Relationships between HR Parts

Screening Questions

You must respond to the following screening questions. The answers given here will determine which screens your institution is shown.

You must answer **Yes** or **No** to the following questions:

- Does your institution have any part-time staff?
  - If you select **Yes**, then additional screens for reporting data on part-time staff will be provided.
- Does you institution have 15 or more full time staff?
  - If you select **No**, then you are viewing the wrong narrative edit document. Please select the appropriate document for less than 15 staff.
- Do ALL of the instructional staff at your institution fall into any of the following categories? Answer **Yes** or **No** to each of the following questions:
  - Are ALL of the instructional staff military personnel?
  - Do ALL of the instructional staff contribute their services (e.g., members of a religious order)?
  - Do ALL of the instructional staff teach pre-clinical or clinical medicine?
  - If you answer **Yes** to any of these questions, the full-time instructional staff screens of **Part G** are **NOT** applicable to your institution and you will **NOT** be required to report data for the full-time instructional staff screens of **Part G**. However, Part G will still be required for reporting data for full-time non-instructional staff.
- Do you wish to report data by gender AND race/ethnicity this year?
  - If you select **Yes**, screens to report data by employment status (full-time and part-time), occupational category, and gender AND race/ethnicity will be displayed, and you must complete all applicable screens.
  - If you select **No**, screens to report data by employment status (full-time and part-time) and occupational category will be displayed. If a screen is only applicable to certain institutions, this will be noted in the section header.
- Does your institution have a tenure system?
  - If you select **Yes**, screens to report data by tenure status will be provided.
  - If you select **No**, then you are viewing the wrong narrative edit document. Please select the appropriate document for institutions with no tenure system.
- Does you institution have graduate assistants?
  - If you select **Yes**, screens to report graduate assistants will be provided.
- Did your institution hire any full-time permanent staff who were included on the payroll of the institution between July 1 and October 31, 2012 either for the *first time* (new to the institution) or *after a break in service* AND who were still on the payroll of the institution as of November 1, 2012?
  - If you select **Yes** and your institution has 15 or more full-time staff, then additional screens for reporting data on full-time permanent new hires will be provided.

The system will perform the following edits on the data entered:

- You must answer each screening question provided for your institution.
- If you report that ALL of your institution's instructional staff are military personnel, contributing their services, or teaching pre-clinical or clinical medicine; you must *confirm* that this is correct.

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Part A: Full-time instructional staff

For each screen listed below, report the number of full-time instructional staff at the institution by academic rank, gender, and race/ethnicity. Academic ranks include Professors, Associate professors, Assistant professors, Instructors, Lecturers, and No academic rank.

- Tenured
- On tenure track
- Not on tenure track with multi-year contract

- Not on tenure track with annual contract
- Not on tenure track with less than annual contract
- Without faculty status (*Only a total is required for this academic rank*.)

On each screen, the total for each gender and race/ethnicity is calculated, as well as the totals for full-time men, full-time women, and grand total (full-time men + women) by academic rank.

Note: If you answered 'No' to the screening question that asks if you wish to report data by gender and race/ethnicity this year, then only one screen will be displayed for your institution with the above academic ranks and tenure status options. This screen will not require data to be reported by gender and race/ethnicity. Additionally, totals by gender and race/ethnicity will not be provided.

The system will perform the following edits on the data entered:

- *Edits are currently under development.*

Part A: Full-time instructional staff by function

On this screen, report the number of full-time instructional staff at the institution by tenure status, medical school status, and function. For each tenure status, provide the number of **Non-medical** and **Medical** staff for each of the following:

- Instruction
  - Exclusively credit
  - Exclusively not-for-credit
  - Combined credit/not-for-credit
- Instruction/research/public service

Totals are calculated for each tenure status, medical function, and non-medical function.

The system will perform the following edits on the data entered:

- *Edits are currently under development.*

Part A: Full-time instructional staff totals

Applicable to institutions that answered Yes to the screening question that asks if you wish to report data by gender and race/ethnicity.

A totals screen is provided displaying the number of Total men, Total women, and Total (men + women) for each race/ethnicity category.

Part B: Full-time non-instructional staff, page 1

Applicable to institutions that answered Yes to the screening question that asks if you wish to report data by gender and race/ethnicity.

On this screen, report the number of full-time non-instructional staff at the institution by occupational category, gender, and race/ethnicity. Provide the following occupational categories for Postsecondary Teachers by gender and race/ethnicity:

- Research
- Public service

Amounts for Total men, Total women, and Total (men + women) are calculated for each occupational category. The **Instructional staff** total is also displayed from **Part A** for your reference.

The system will perform the following edits on the data entered:

- *Edits are currently under development.*

Part B: Full-time non-instructional staff, page 2

Applicable to institutions that answered Yes to the screening question that asks if you wish to report data by gender and race/ethnicity.

On this screen, report the number of full-time non-instructional staff at the institution by occupational category, gender, and race/ethnicity. Provide the following occupational categories by gender and race/ethnicity:

- Archivists, Curators, and Museum Technicians
- Librarians
- Library Technicians
- Other Teachers and Instructional Support Staff

Amounts for Total men, Total women, and Total (men + women) are calculated for each occupational category.

The system will perform the following edits on the data entered:

- *Edits are currently under development.*

Part B: Full-time non-instructional staff, page 3

Applicable to institutions that answered Yes to the screening question that asks if you wish to report data by gender and race/ethnicity.

On this screen, report the number of full-time non-instructional staff at the institution by occupational category, gender, and race/ethnicity. Provide the following occupational categories by gender and race/ethnicity:

- Management Occupations
- Business and Financial Operations Occupations
- Computer, Engineering, and Science Occupations
- Community Service, Legal, Arts, and Media Occupations
- Healthcare Practitioners and Technical Occupations

Amounts for Total men, Total women, and Total (men + women) are calculated for each occupational category.

The system will perform the following edits on the data entered:

- *Edits are currently under development.*

Part B: Full-time non-instructional staff, page 4

Applicable to institutions that answered Yes to the screening question that asks if you wish to report data by gender and race/ethnicity.

On this screen, report the number of full-time non-instructional staff at the institution by occupational category, gender, and race/ethnicity. Provide the following occupational categories by gender and race/ethnicity:

- Service Occupations
- Sales and Related Occupations
- Office and Administrative Support Occupations
- Natural Resources, Construction, and Maintenance Occupations
- Production, Transportation, and Material Moving Occupations

Amounts for Total men, Total women, and Total (men + women) are calculated for each occupational category. A **Full-time total** is also calculated for each gender and race/ethnicity category.
The system will perform the following edits on the data entered:

- *Edits are currently under development.*

Part B: Full-time non-instructional staff by occupational category
On this screen, report the number of full-time non-instructional staff at the institution by tenure status, medical school status, and occupational category. For each tenure status, provide the number of **Non-medical** and **Medical** staff for each of the following:

- Postsecondary Teachers – Research
- Postsecondary Teachers – Public service
- Archivists, Curators, and Museum Technicians
- Librarians
- Library Technicians
- Other Teachers and Instructional Support Staff
- Management Occupations
- Business and Financial Operations Occupations
- Computer, Engineering, and Science Occupations
- Community Service, Legal, Arts, and Media Occupations
- Healthcare Practitioners and Technical Occupations

Totals are calculated for each occupational category.
The system will perform the following edits on the data entered:

- *Edits are currently under development.*

Part B: Full-time non-instructional staff by medical school status
On this screen, report the number of full-time non-instructional staff at the institution by medical school status and occupational category. Provide the number of **Non-medical** and **Medical** staff for each of the following:

- Service Occupations
- Sales and Related occupations
- Office and administrative support occupations
- Natural Resources, Construction, and Maintenance Occupations
- Production, Transportation, and Material Moving Occupations

Totals are calculated for each occupational category.
The system will perform the following edits on the data entered:

- *Edits are currently under development.*

Part C: Full-time non-medical summary
A totals screen is provided displaying the number full-time, non-medical school staff by tenure status and occupational category.
Part C: Full-time medical summary
A totals screen is provided displaying the number full-time, medical school staff by tenure status and occupational category.

Salary Parts

Applicable to degree-granting institutions that selected No for all options in the screening question that asks if all of your institution's instructional staff are military personnel, contributing their services, or teaching pre-clinical or clinical medicine.

Part G: Salary Worksheet
On this screen, report the number of full-time instructional staff at the institution by contract length, gender, and academic rank. Contract lengths include 9-month, 10-month, 11-month, and 12-month. Academic ranks include Professors, Associate professors, Assistant professors, Instructors, Lecturers, and No academic rank.
The **Total employees for salary reporting**, **Total number of Months**, and **Balance** will be calculated by academic rank and gender. Additionally, the **Total instructional staff from Part A** is displayed for your reference. The system will also calculate the total number of men, total number of women, and grand total (men + women) for each contract length.
The system will perform the following edits on the data entered:

- *Edits are currently under development.*

Part G: Salary outlays for full-time instructional staff by gender and academic rank
On this screen, report the number of Salary Outlays for full-time instructional staff at the institution by gender and academic rank. Academic ranks include the following:

- Professors
- Associate professors
- Assistant professors
- Instructors
- Lecturers
- No academic rank

From the ***Part G Salary worksheet***, the **Headcount** OR Total employees for Salary reporting and the **Total number of months** are displayed for your reference. The system will calculate the total number of men, total number of women, and grand total (men + women) for salary outlays, as well as the **Weighted average Salaries per month**.
The system will perform the following edits on the data entered:

- *Edits are currently under development.*

Part G: Salary outlays for full-time non-instructional staff by occupational category
On this screen, report the number of **Total salary outlays** for full-time non-instructional staff at the institution by occupational category. Occupational categories include the following:

- Postsecondary Teachers - Research
- Postsecondary Teachers - Public Service
- Library and Instructional Support Occupations
- Management Occupations
- Business and Financial Operations Occupations
- Computer, Engineering, and Science Occupations
- Community Service, Legal, Arts, and Media Occupations
- Healthcare Practitioners and Technical Occupations
- Service Occupations
- Sales and Related Occupations
- Office and Administrative Support Occupations
- Natural Resources, Construction, and Maintenance Occupations
- Production, Transportation, and Material Moving Occupations

The Number of staff is displayed for your reference for each occupational category.
The system will perform the following edits on the data entered:

- *Edits are currently under development.*

Part D: Part-time staff, page 1
Applicable to institutions that answered Yes to the screening question that asks if you wish to report data by gender and race/ethnicity.
On this screen, report the number of part-time staff at the institution by occupational category, gender, and race/ethnicity.
Provide the following occupational categories for Postsecondary Teachers by gender and race/ethnicity:

- Instructional Staff
- Research
- Public service

Amounts for Total men, Total women, and Total (men + women) are calculated for each occupational category.
The system will perform the following edits on the data entered:

- *Edits are currently under development.*

Part D: Part-time staff, page 2
Applicable to institutions that answered Yes to the screening question that asks if you wish to report data by gender and race/ethnicity.
On this screen, report the number of part-time staff at the institution by occupational category, gender, and race/ethnicity.
Provide the following occupational categories by gender and race/ethnicity:

- Archivists, Curators, and Museum Technicians
- Librarians
- Library Technicians
- Other Teachers and Instructional Support Staff

Amounts for Total men, Total women, and Total (men + women) are calculated for each occupational category. A **Librarians and Other Teachers** total is also calculated for each gender and race/ethnicity category.
The system will perform the following edits on the data entered:

- *Edits are currently under development.*

Part D: Part-time staff, page 3
Applicable to institutions that answered Yes to the screening question that asks if you wish to report data by gender and race/ethnicity.
On this screen, report the number of part-time staff at the institution by occupational category, gender, and race/ethnicity.
Provide the following occupational categories by gender and race/ethnicity:

- Management Occupations
- Business and Financial Operations Occupations
- Computer, Engineering, and Science Occupations
- Community Service, Legal, Arts, and Media Occupations
- Healthcare Practitioners and Technical Occupations

Amounts for Total men, Total women, and Total (men + women) are calculated for each occupational category.
The system will perform the following edits on the data entered:

- *Edits are currently under development.*

Part D: Part-time staff, page 4
Applicable to institutions that answered Yes to the screening question that asks if you wish to report data by gender and race/ethnicity.
On this screen, report the number of part-time staff at the institution by occupational category, gender, and race/ethnicity.
Provide the following occupational categories by gender and race/ethnicity:

- Service Occupations
- Sales and Related Occupations
- Office and Administrative Support Occupations
- Natural Resources, Construction, and Maintenance Occupations
- Production, Transportation, and Material Moving Occupations

Amounts for Total men, Total women, and Total (men + women) are calculated for each occupational category. A **Part-time total** is also calculated for each gender and race/ethnicity category.
The system will perform the following edits on the data entered:

- *Edits are currently under development.*

Part D: Graduate Assistants

Applicable to institutions that reported having graduate assistants in the screening questions and those that answered Yes to the screening question that asks if you wish to report data by gender and race/ethnicity.
On this screen, report the number of graduate assistants at the institution by occupational category, gender, and race/ethnicity. Provide the following occupational categories by gender and race/ethnicity:

- Teaching
- Research
- Management
- Business and Financial Operations
- Computer, Engineering, and Science
- Community Service, Legal, Arts, and Media
- Library and Instructional Support
- Healthcare Practitioners and Technical

Amounts for Total men, Total women, and Total (men + women) are calculated for each occupational category. Totals are also calculated for each gender and race/ethnicity category.
The system will perform the following edits on the data entered:

- *Edits are currently under development.*

Part E: Part-time staff by occupational category
On this screen, report the number of part-time staff at the institution by tenure status, medical school status, and occupational category. For each tenure status, provide the number of **Non-medical** and **Medical** staff for each of the following:

- Postsecondary Teachers by function
  - Instruction
    - Exclusively credit
    - Exclusively not-for-credit
    - Combined credit/not-for-credit
  - Instruction/Research/Public service
  - Research
  - Public service
- Archivists, Curators, and Museum Technicians
- Librarians
- Other Technicians
- Other Teachers and Instructional Support Staff
- Management Occupations
- Business and Financial Operations Occupations
- Computer, Engineering, and Science Occupations
- Community Service, Legal, Arts, and Media Occupations
- Healthcare Practitioners and Technical Occupations

Totals are calculated for each occupational category.
The system will perform the following edits on the data entered:

- *Edits are currently under development.*

Part E: Part-time staff by medical school status
On this screen, report the number of part-time staff at the institution by medical school status and occupational category. Provide the number of **Non-medical** and **Medical** staff for each of the following:

- Service Occupations
- Sales and Related Occupations
- Office and Administrative Support Occupations
- Natural Resources, Construction, and Maintenance Occupations
- Production, Transportation, and Material Moving Occupations
- Graduate Assistants
  - Teaching
  - Research
  - Management
  - Business and Financial Operations
  - Computer, Engineering, and Science
  - Community Service, Legal, Arts, and Media
  - Library and Instructional Support
  - Healthcare Practitioners and Technical

Totals are calculated for each occupational category.
The system will perform the following edits on the data entered:

- *Edits are currently under development.*

Part F: Part-time non-medical summary
A totals screen is provided displaying the number part-time, non-medical school staff by tenure status and occupational category.
Part F: Part-time medical summary
A totals screen is provided displaying the number part-time, medical school staff by tenure status and occupational category.
Part H: New Hires, Full-time instructional staff
Applicable to institutions that reported having new hires in the screening questions and those that answered Yes to the screening question that asks if you wish to report data by gender and race/ethnicity.
On this screen, report the number of newly hired full-time permanent instructional staff at the institution by tenure status, gender, and race/ethnicity. These staff should include those hired full-time between July 1 and October 31, 2012 and still on the payroll of the institution as of November 1, 2012. Provide the number of staff by gender and race/ethnicity for each of the following tenure statuses:

- Tenured
- On tenure track
- Not on tenure track with multi-year contract
- Not on tenure track with annual contract
- Not on tenure track with less than annual contract
- Without faculty status

Amounts for Total men, Total women, and Total (men + women) are calculated for each tenure status. Totals are also calculated for each gender and race/ethnicity category.
The system will perform the following edits on the data entered:

- *Edits are currently under development.*

Part H: New Hires
Applicable to institutions that reported having new hires in the screening questions and those that answered No to the screening question that asks if you wish to report data by gender and race/ethnicity.
On this screen, report the number of newly hired full-time permanent instructional staff by contract length (multi-year contract, Annual contract, Less-than-annual contract, and Without faculty status). Next, report the number of full-time staff at the institution by occupational category. Provide totals for each of the following occupational categories:

- Research
- Public service
- Library and Instructional Support Occupations
- Management Occupations
- Business and Financial Operations Occupations
- Computer, Engineering, and Science Occupations
- Community Service, Legal, Arts, and Media Occupations
- Healthcare Practitioners and Technical Occupations
- Service Occupations
- Sales and Related Occupations
- Office and Administrative Support Occupations
- Natural Resources, Construction, and Maintenance Occupations
- Production, Transportation, and Material Moving Occupations

The system will perform the following edits on the data entered:

- *Edits are currently under development.*

Part H: New Hires, Full-time staff
Applicable to institutions that reported having new hires in the screening questions and those that answered Yes to the screening question that asks if you wish to report data by gender and race/ethnicity.
On this screen, report the number of newly hired full-time permanent instructional staff at the institution by occupational category, gender, and race/ethnicity. These staff should include those hired full-time between July 1 and October 31, 2012 and still on the payroll of the institution as of November 1, 2012. Provide the number of staff by gender and race/ethnicity for each of the following occupational categories:

- Research
- Public Service
- Library and Instructional Support Occupations

Amounts for Total men, Total women, and Total (men + women) are calculated for each occupational category. **Instructional Staff** totals are also displayed from ***Part H: New Hires, Full-time instructional staff*** for your reference.
The system will perform the following edits on the data entered:

- *Edits are currently under development.*

Part H: New Hires, Full-time non-instructional staff, page 1
Applicable to institutions that reported having new hires in the screening questions and those that answered Yes to the screening question that asks if you wish to report data by gender and race/ethnicity.
On this screen, report the number of newly hired full-time permanent instructional staff at the institution by occupational category, gender, and race/ethnicity. These staff should include those hired full-time between July 1 and October 31, 2012 and still on the payroll of the institution as of November 1, 2012. Provide the number of staff by gender and race/ethnicity for each of the following occupational categories:

- Management Occupations
- Business and Financial Operations Occupations
- Computer, Engineering, and Science Occupations
- Community Service, Legal, Arts, and Media Occupations
- Healthcare Practitioners and Technical Occupations

Amounts for Total men, Total women, and Total (men + women) are calculated for each occupational category.
The system will perform the following edits on the data entered:

- *Edits are currently under development.*

Part H: New Hires, Full-time non-instructional staff, page 2

Applicable to institutions that reported having new hires in the screening questions and those that answered Yes to the screening question that asks if you wish to report data by gender and race/ethnicity.

On this screen, report the number of newly hired full-time permanent instructional staff at the institution by occupational category, gender, and race/ethnicity. These staff should include those hired full-time between July 1 and October 31, 2012 and still on the payroll of the institution as of November 1, 2012. Provide the number of staff by gender and race/ethnicity for each of the following categories:

- Service Occupations
- Sales and Related Occupations
- Office and Administrative Support Occupations
- Natural Resources, Construction, and Maintenance Occupations
- Production, Transportation, and Material Moving Occupations

Amounts for Total men, Total women, and Total (men + women) are calculated for each occupational category. The number of Total New Hires is also calculated by gender and race/ethnicity.
The system will perform the following edits on the data entered:

- *Edits are currently under development.*

Relationships between parts within the Fall Staff section

Within the ***Fall Staff*** section, the system will perform the following edits on the data entered:

- New Hires reported in ***Part H*** must be less than or equal to the full-time employees reported in ***Part A*** and ***Part B***.

Relationships between HR Parts

The system will perform the following edits on the data entered:

- The total number of full-time instructional staff reported in ***Part A*** must be greater than or equal to the total number of full-time instructional staff reported on the ***Part G Salary Worksheet*** screen.

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