Integrated Postsecondary Education Data System (IPEDS) 2022-23 through 2024-25

Appendix B

IPEDS 2023-24 Communication Package

OMB No. 1850-0582 v.31

Submitted by:
National Center for Education Statistics (NCES)
Institute of Education Sciences
U.S. Department of Education

February 2022
revised July 2023
revised September 2023

Contents

IPEDS Communication Package

This package will be used across the 3 years of clearance (2022-23, 2023-24, 2024-25), with dates updated throughout the communications each year. Other changes may include updating contacts information or updating links if needed.

Section 1: Communications sent prior to collection opening

Exhibit 1 outlines the schedule of planned coordination and collection communications that are sent prior to the opening of the data collection. **Exhibits 2 through 17** include the draft text of (a) the coordination tree email; (b) the chief executive officer (CEO) letters, (c) pre-collection keyholder registration emails, (d) reminder emails to non-registered users, (e) notification to software vendors, and (f) annual update emails to CEOs and coordinators.

Exhibit 1. IPEDS 2023-24 Data Collection Communications and Follow-Up Schedule

Collection	Date	Correspondence Type	Scheduled Time	Recipient(s)	Communication Criteria
Pre-registration	Prior to 8/9/23	Coordination tree update email	May 2023	Coordinators	All
Registration Period	8/9/23	Letter w/keyholder registration letter and registration certificate	Registration opening	CEO	No previous keyholder
	8/9/23	Registration email w/User ID	Registration opening	Keyholders/ Coordinators	All
	8/9/23	Password email	Registration opening	Keyholders/ Coordinators	All
	8/9/23	Notification of survey materials update	Registration opening	Software vendors	All registered
	Ongoing	New Keyholder Welcome Package	At time of registration	New Keyholders	All registered
	8/23/23	Prompting registration email	2 weeks following registration opening	Keyholders	Not registered
	8/30/23	Prompting registration letter	3 weeks following registration opening	CEOs	No keyholder registered
	8/30/23	Annual update email	3 weeks following registration opening	CEOs/coordinators	All CEOs, all coordinators

Exhibit 2. Coordination Tree Update Request Email

Dear IPEDS Coordinator –

As you know, we are quickly approaching the registration period for the 2023-24 IPEDS data collection. As we prepare for registration, we would like to ask you to please review the list of institutions you have access to in the data collection system, by logging into the system and clicking on "Institutions."

Respond to this email to let the Help Desk know if:
* You would like to add to or subtract from your list. If you are a state coordinator, you have a report in your Reports menu called State List of Institutions Not Coordinated by Your Office; this list includes any institutions (Title IV or not) in your state that are in the IPEDS universe but not in your coordination plan.
* You would like to change your access to any of your listed institutions. Your options are View, Update, and Lock. Please consult the Coordinator Manual (in the Help menu) for descriptions of these access levels, and contact the Help Desk if you have questions.

Please contact Moussa Ezzeddine (Moussa.Ezzeddine@ed.gov) if:
* You see any closed institutions on your list that are not reflected as such.
* You are a system coordinator and there are mergers happening that need to be reflected in IPEDS for 2023-24.

If possible, please respond with any changes or questions by July 30, 2023. You can, of course, update your coordination plan during the year, but it helps us to be able to make these changes before the data collection starts for the year.

Thanks for your assistance.

Tara Lawley
Program Director, Integrated Postsecondary Education Data System
Postsecondary Branch, Administrative Data Division
National Center for Education Statistics

Exhibit 3. Registration Letter to CEOs of Institutions with no Previous Keyholder

<NCES Letterhead>
August 9, 2023

ceo_name
ceo_title
institution_name
addr1_txt
city_txt, state_cd zip_text

Dear Chief Executive Officer:

Your institution currently does not have a designated keyholder for the upcoming 2023-24 Integrated Postsecondary Education Data System (IPEDS) data collection cycle; please appoint one at this time, and forward the enclosed materials to that individual.

The National Center for Education Statistics is finalizing preparations for the 2023-24 Integrated Postsecondary Education Data System (IPEDS) data collection. The success of the IPEDS data collection and quality of the IPEDS data depend, in large part, on the efforts of your institution's keyholder.

The keyholder is responsible for your institution's data submission and should be someone who is familiar with the IPEDS data collection. This person is responsible for all three collections— Fall 2023, Winter 2023-24, and Spring 2024. The enclosed materials provide the information **your appointed keyholder will need to register prior to entering data into the system.** Once your keyholder registers, all future correspondence will go directly to him or her.

The importance of your institution's compliance with this reporting responsibility cannot be overstated. Please be aware that responses to the IPEDS surveys are mandated for those institutions that participate or expect to participate in Title IV federal financial aid programs under Section 487(a)(17) of the Higher Education Act of 1965, as amended (HEA), 20 U.S.C. §1094(a)(17) and the Department of Education's regulations at 34 C.F.R. §668.14(b)(19). As a condition of continued participation in the federal student aid programs, all institutions must complete, in a timely manner and to the satisfaction of the Secretary, **all** surveys conducted as a part of the Integrated Postsecondary Education Data System. According to the Office of Federal Student Aid (FSA), an institution's failure to complete and submit these surveys is a serious violation of its obligations under the HEA and the regulations, and appropriate action, including warnings, fines and possible loss of eligibility for Title IV federal student financial aid programs will be taken by that office.

The Department of Education relies on postsecondary institutions to accurately report data to IPEDS, and nearly all institutions do. Institutions themselves sometimes identify misreporting issues and work with ED to correct those problems without the need for further action by the Department. The Department is concerned about any instances of intentional or significant misreporting. Under these circumstances, the Office of Federal Student Aid may take administrative action to appropriately address the issue.

Because of the importance of the IPEDS surveys, **we will contact you again if your keyholder has not registered by August 30, 2023**. Registration is currently open, and the data collection periods are scheduled as follows:

Fall 2023:	September 6, 2023 – October 18, 2023
Winter 2023-24:	December 6, 2023 – February 7, 2024
Spring 2024:	December 6, 2023 – April 3, 2024

There is no need for you to respond to this letter. However, if you need any additional information or have any questions, please contact the IPEDS Help Desk toll free at 1-877-225-2568 (or send an email to ipedshelp@rti.org). Thank you in advance for your assistance in this important project.

Sincerely,

Ross C. Santy
Associate Commissioner
Administrative Data Division
National Center for Education Statistics

Attachments
<mark>unitid</mark>

Exhibit 4. Registration Letter to New Keyholders

<NCES Letterhead>
August 9, 2023

IPEDS Keyholder
<mark>institution_name</mark>

Dear IPEDS Keyholder:

Welcome! Your Chief Administrator has designated you as the **IPEDS Keyholder** for the Integrated Postsecondary Education Data System (IPEDS) 2023-24. The success of the IPEDS data collection and quality of the IPEDS data depend, in large part, on your efforts. Thank you in advance for your work this coming year.

As the IPEDS keyholder, you are responsible for assuring the accuracy of all of your institution's data submitted to IPEDS, and for "locking" the surveys by the designated keyholder deadlines for the three 2023-24 data collections (Fall 2023, Winter 2023-24, and Spring 2024). Enclosed is a registration certificate that provides you with the information you need to **register by August 30** and subsequently participate in these important data collections.

The Fall 2023, Winter 2023-24, and Spring 2024 data collections will be administered through a web system that can be accessed only by designated staff with assigned UserIDs and passwords. This Fall we will collect Institutional Characteristics, Completions, and 12-month Enrollment data. The Winter collection will include the Student Financial Aid, Graduation Rates, Graduation Rates 200, Admissions and Outcome Measures components. The Spring collection (which opens December 6 and will be open continuously until April 3) includes the Fall Enrollment, Finance, Human Resources and Academic Libraries components.

IMPORTANT NOTE: There are significant changes to the survey forms for this collection year. Please review these changes at https://surveys.nces.ed.gov/ipeds/ViewIPEDSChangesToTheCurrentYear.aspx before completing the survey components. Please also review the survey materials at https://surveys.nces.ed.gov/ipeds/VisIndex.aspx to view these changes.

The data collection periods are scheduled as follows:

Fall 2023:	September 6, 2023 – October 18, 2023
Winter 2023-24:	December 6, 2023 – February 7, 2024
Spring 2024:	December 6, 2023 – April 3, 2024

For your convenience in preparing for the upcoming collections, ALL survey forms, instructions, file import specifications, and FAQs for the 2023-24 surveys are available through the data collection system (select Help, then Survey Materials). A New Keyholder Handbook is also available in the Help menu; this resource includes a lot of useful information, including information on keyholder responsibilities, how to submit and lock your data, where to get help and training, and tips from veteran keyholders.

The importance of your institution's compliance with the IPEDS reporting responsibility cannot be overstated. Please note that responses to the IPEDS surveys are mandated for those institutions that participate or expect to participate in Title IV federal financial aid programs under Section 487(a)(17) of the Higher Education Act of 1965, as amended, (HEA), 20 U.S.C. §1094(a)(17) and the Department of Education's regulations at 34 C.F.R. §668.14(b)(19). As a condition of continued participation in the federal student aid programs, all institutions must complete, in a timely manner and to the satisfaction of the Secretary, **all** surveys conducted as a part of the Integrated Postsecondary Education Data System.

According to the Office of Federal Student Aid (FSA), an institution's failure to complete and submit these surveys is a serious violation of its obligations under the HEA and the regulations, and appropriate action, including warnings, fines, and possible loss of eligibility for Title IV federal student financial aid programs, will be taken by that office.

The Department of Education relies on postsecondary institutions to accurately report data to IPEDS, and nearly all institutions do. Institutions themselves sometimes identify misreporting issues and work with ED to correct those problems without the need for further action by the Department. The Department is concerned about any instances of intentional or significant misreporting. Under these circumstances, the Office of Federal Student Aid may take administrative action to appropriately address the issue.

As your institution's keyholder, the first deadline you must meet is to register as the IPEDS keyholder using the information on the enclosed registration certificate prior to August 30. If you have not registered by that date, we will send a letter to your institution's CEO indicating that your institution has no registered keyholder. The registration screen asks for specific contact information. This information must be complete, and the email address provided will be used for ALL further contact with your institution during these data collections. If your institution has more than one person who will need to provide data for the surveys, you may request up to sixteen (16) additional UserIDs and passwords for these staff members. However, please remember that all communication will flow through you as the IPEDS keyholder, and you will be the only person allowed to lock your data.

Please refer to the collection schedule on your registration certificate and allow sufficient time to enter and lock your data for Fall, Winter, and Spring. Once your institution's data have been locked, they will be reviewed by NCES. You may receive a request for clarification based on this review. Your institution's data will be made available to other responding institutions through the IPEDS Data Center, and they will be posted to the College Navigator website, where information can be accessed by students and parents (http://collegesearch.ed.gov).

Thank you for your assistance. If you need additional information, please call the IPEDS Help Desk at the toll free number 1-877-225-2568 (or send an email to ipedshelp@rti.org).

Sincerely,

Ross C. Santy
Associate Commissioner
Administrative Data Division
National Center for Education Statistics

Attachments
unitid

Exhibit 5. Registration Certificate

Registration Certificate
IPEDS 2023-24 Collection Year

<mark>unitid</mark>

<mark>institution_name</mark>

User ID: <mark>user_ID</mark>

Password: <mark>password_txt</mark>

Note: The above password is temporary and you will be required to establish a new password upon your first login.

IPEDS HELP DESK:
ipedshelp@rti.org
1-877-225-2568

On-line Registration
https://surveys.nces.ed.gov/ipeds

Opens August 9, 2023
Use the Help menu for copies of survey forms
and other important information for respondents

2023-24 Data Collection Periods[1]

http://surveys.nces.ed.gov/ipeds

Fall 2023: **September 6, 2023 – October 18, 2023**
Winter 2023-24: **December 6, 2023 – February 7, 2024**
Spring 2024: **December 6, 2023 – April 3, 2024**

[1]Closeout dates are firm and no extensions will be granted

Exhibit 6. Registration Email to Keyholders
Subject: IPEDS 2023-24 Registration Information - <mark>\<UnitID\></mark>

August 9, 2023

Dear IPEDS Keyholder:

Welcome back! The National Center for Education Statistics is finalizing preparations for the 2023-24 IPEDS data collection. At the end of the Spring 2023 collection period, you were registered as the keyholder for your institution. If you will continue to serve as the keyholder for the upcoming 2023-24 collection cycle, please be sure to register as directed below. If you will NOT be serving as the keyholder for this collection year, please forward this email to your Chief Executive Officer so that another keyholder can be assigned.

The success of the IPEDS data collection and quality of the IPEDS data depend, in large part, on your efforts. Thank you in advance for your work this coming year.

The importance of your institution's compliance with the IPEDS reporting responsibility cannot be overstated. As you know, responses to the IPEDS surveys are mandated for those institutions that participate or expect to participate in Title IV federal financial aid programs under Section 487(a)(17) of the Higher Education Act of 1965, as amended, (HEA), 20 U.S.C. §1094(a)(17) and the Department of Education's (Department) regulations at 34 C.F.R. §668.14(b)(19). As a condition of continued participation in the federal student aid programs, all institutions must complete, in a timely manner and to the satisfaction of the Secretary, all surveys conducted as a part of the Integrated Postsecondary Education Data System. According to the Office of Federal Student Aid (FSA), an institution's failure to complete and submit these surveys is a serious violation of its obligations under the HEA and the regulations, and appropriate action, including warnings, fines, and possible loss of eligibility for Title IV federal student financial aid programs, will be taken by that office.

The Department of Education relies on postsecondary institutions to accurately report data to IPEDS, and nearly all institutions do. Institutions themselves sometimes identify misreporting issues and work with ED to correct those problems without the need for further action by the Department. The Department is concerned about any instances of intentional or significant misreporting. Under these circumstances, the Office of Federal Student Aid may take administrative action to appropriately address the issue.

Keyholder Registration:
The keyholder's UserID is the same as it has been in prior years.

The password needed to access the IPEDS web-based data collection system for the 2023-24 collection cycle **will be sent separately,** shortly after this email. This is a TEMPORARY password and you will need to create a new password when logging in.

* *
Institution: <mark>\<Institution_Name\></mark>
UserID: <mark>**\<UserID\>**</mark>
Temporary Password: This is being sent in a separate email
* *

If you need assistance logging in, or if you did not receive the email containing your password, please contact the Help Desk by replying to this email or by calling 1-877-225-2568.

The registration site opens August 9, 2023. Keyholders must register online at: http://surveys.nces.ed.gov/IPEDS by **August 30, 2023**. In order to ensure that each institution is registered, we will send reminder letters to CEOs of Title IV institutions if the keyholder is not registered by the August 30 date.

When registering in the system, please be sure that your registration information is correct. Verify your phone number and make sure that your email address is correct, since these will be used for ALL further contact during the data collection. You may also designate a different keyholder at this time and you may request additional IDs and passwords for other users if your institution has more than one person who will need access to the system. You may request up to sixteen (16) additional UserIDs and passwords when you register. All additional users will be required to register, but only the keyholder must register by August 30.

2023-24 Data Collection

Schedule for the 2023-24 Data Collection: https://surveys.nces.ed.gov/ipeds/public/data-collection-schedule
Changes to the 2023-24 Survey Components:
https://surveys.nces.ed.gov/ipeds/ViewIPEDSChangesToTheCurrentYear.aspx. For more information, use the Help menu in the data collection system.

A quick overview of the 2023-24 IPEDS data collection is provided below:

IMPORTANT NOTE: There are significant changes to the survey forms for this collection year. Please review these changes at https://surveys.nces.ed.gov/ipeds/ViewIPEDSChangesToTheCurrentYear.aspx before completing the survey components. Please also review the survey materials at https://surveys.nces.ed.gov/ipeds/VisIndex.aspx to view these changes.

Registration Period 2023-24 (Registration, Institution Mapping, Institution Identification, IC Header)
During the registration period (August 9, 2023-August 30, 2023), institutions are encouraged to complete the Institution Identification page, the Institution Mapping (if applicable), and the IC Header questions. These three items must be completed before the Fall survey components can be started. The IC Header is available until the end of the Fall collection. Institution Identification is available through Spring.

Fall 2023 (Institutional Characteristics, Completions, and 12-month Enrollment):
Opens September 6, 2023
Closes October 18, 2023 for Keyholders

Winter 2023-24 (Student Financial Aid, Graduation Rates, Graduation Rates 200, Admissions, and Outcome Measures**):**
Opens December 6, 2023
Closes February 7, 2024 for Keyholders

Spring 2024 (Fall Enrollment, Finance, Human Resources, Academic Libraries):
Opens December 6, 2023
Closes April 3, 2024 for Keyholders

For your convenience in preparing for the upcoming collections, ALL survey forms, instructions, file import specifications, and FAQs for the 2023-24 surveys are available through the data collection system (select Help, then Survey Materials). A New Keyholder Handbook is also available in the Help menu; even though you are a veteran IPEDS keyholder, this resource may be useful to you.

Data Availability for 2022-23 Collection:

Data submitted by institutions during the 2022-23 IPEDS Fall, Winter, and Spring collections are currently available through the IPEDS Use the Data tools (at the Collection level). Additionally, we continue to update the College Navigator website with new data as they become available. These tools can be accessed from the IPEDS homepage at: http://nces.ed.gov/ipeds.

We hope you enjoy the rest of the summer and thank you in advance for your assistance in making IPEDS a success. If you need additional information, please call the Help Desk at 1-877-225-2568 or email them at ipedshelp@rti.org.

Best regards,

Tara Lawley
Program Director, Integrated Postsecondary Education Data System
Postsecondary Branch, Administrative Data Division
National Center for Education Statistics

Exhibit 7. Password Email to Keyholders
Subject: IPEDS Temporary Password

Previously, you were emailed registration information for the 2023-24 IPEDS Data Collection, including your UserID. For security purposes, your password is now being emailed separately.

Your password for registering in the IPEDS Data Collection System is listed below. This is a temporary password and you will need to create a new password when logging in.

Password: <mark><Password></mark>

If you need assistance logging in, or if you did not receive the email containing your UserID, please contact the Help Desk by replying to this email or by calling 1-877-225-2568.

The IPEDS data collection system is located at: https://surveys.nces.ed.gov/ipeds/

IPEDS Help Desk
Toll Free 1-877-225-2568
ipedshelp@rti.org

Exhibit 8. Registration Email to Multi-Keyholders
Subject: IPEDS 2022-23 Registration Information - <mark>\<UserID\></mark>

Subject: IPEDS 2023-24 Registration Information - <mark>\<UserID\></mark>

August 9, 2023

Dear IPEDS Keyholder:

Welcome back! The National Center for Education Statistics is finalizing preparations for the 2023-24 IPEDS data collection. At the end of the Spring 2023 collection period, you were registered as the keyholder for your institution. If you will continue to serve as the keyholder for the upcoming 2023-24 collection cycle, please be sure to register as directed below. If you will NOT be serving as the keyholder for this collection year, please forward this email to your Chief Executive Officer so that another keyholder can be assigned.

The success of the IPEDS data collection and quality of the IPEDS data depend, in large part, on your efforts. Thank you in advance for your work this coming year.

The importance of your institution's compliance with the IPEDS reporting responsibility cannot be overstated. As you know, responses to the IPEDS surveys are mandated for those institutions that participate or expect to participate in Title IV federal financial aid programs under Section 487(a)(17) of the Higher Education Act of 1965, as amended, (HEA), 20 U.S.C. §1094(a)(17) and the Department of Education's (Department) regulations at 34 C.F.R. §668.14(b)(19). As a condition of continued participation in the federal student aid programs, all institutions must complete, in a timely manner and to the satisfaction of the Secretary, all surveys conducted as a part of the Integrated Postsecondary Education Data System. According to the Office of Federal Student Aid (FSA), an institution's failure to complete and submit these surveys is a serious violation of its obligations under the HEA and the regulations, and appropriate action, including warnings, fines, and possible loss of eligibility for Title IV federal student financial aid programs, will be taken by that office.

The Department of Education relies on postsecondary institutions to accurately report data to IPEDS, and nearly all institutions do. Institutions themselves sometimes identify misreporting issues and work with ED to correct those problems without the need for further action by the Department. The Department is concerned about any instances of intentional or significant misreporting. Under these circumstances, the Office of Federal Student Aid may take administrative action to appropriately address the issue.

Keyholder Registration:
The keyholder's UserID is the same as it has been in prior years.

The password needed to access the IPEDS web-based data collection system for the 2023-24 collection cycle **will be sent separately,** shortly after this email. This is a TEMPORARY password and you will need to create a new password when logging in.

* *

UserID: <mark>\<UserID\></mark>
Temporary Password: This is being sent in a separate email
* *

If you need assistance logging in, or if you did not receive the email containing your password, please contact the Help Desk by replying to this email or by calling 1-877-225-2568.

The registration site opens August 9, 2023. Keyholders must register online at: http://surveys.nces.ed.gov/IPEDS by **August 30, 2023**. In order to ensure that each institution is registered, we will send reminder letters to CEOs of Title IV institutions if the keyholder is not registered by the August 30 date.

When registering in the system, please be sure that your registration information is correct. Verify your phone number and make sure that your email address is correct, since these will be used for ALL further contact during the data collection. You may also designate a different keyholder at this time and you may request additional IDs and passwords for other users if your institution has more than one person who will need access to the system. You may request up to sixteen (16) additional UserIDs and passwords when you register. All additional users will be required to register, but only the keyholder must register by August 30.

2023-24 Data Collection

Schedule for the 2023-24 Data Collection: https://surveys.nces.ed.gov/ipeds/public/data-collection-schedule Changes to the 2023-24 Survey Components: https://surveys.nces.ed.gov/ipeds/ViewIPEDSChangesToTheCurrentYear.aspx. For more information, use the Help menu in the data collection system.

A quick overview of the 2023-24 IPEDS data collection is provided below:

IMPORTANT NOTE: There are significant changes to the survey forms for this collection year. Please review these changes at https://surveys.nces.ed.gov/ipeds/ViewIPEDSChangesToTheCurrentYear.aspx before completing the survey components. Please also review the survey materials at https://surveys.nces.ed.gov/ipeds/VisIndex.aspx to view these changes.

Registration Period 2023-24 (Registration, Institution Mapping, Institution Identification, IC Header) During the registration period (August 9, 2023- August 30, 2023), institutions are encouraged to complete the Institution Identification page, the Institution Mapping (if applicable), and the IC Header questions. These three items must be completed before the Fall survey components can be started. The IC Header is available until the end of the Fall collection. Institution Identification is available through Spring.

Fall 2023 (Institutional Characteristics, Completions, and 12-month Enrollment):
Opens September 6, 2023
Closes October 18, 2023 for Keyholders

Winter 2023-24 (Student Financial Aid, Graduation Rates, Graduation Rates 200, Admissions, and Outcome Measures):
Opens December 6, 2023
Closes February 7, 2024 for Keyholders

Spring 2024 (Human Resources, Fall Enrollment, Finance, Academic Libraries):
Opens December 6, 2023
Closes April 3, 2024 for Keyholders

For your convenience in preparing for the upcoming collections, ALL survey forms, instructions, file import specifications and FAQs for the 2023-24 surveys are available through the data collection system (select Help, then Survey Materials). A New Keyholder Handbook is also available in the Help menu; even though you are a veteran IPEDS keyholder, this resource may be useful to you.

Data Availability for 2022-23 Collection:
Data submitted by institutions during the 2022-23 IPEDS Fall, Winter, and Spring collections are currently available through the IPEDS Use the Data tools (at the Collection level). Additionally, we continue to update the College Navigator website with new data as they become available. These tools can be accessed from the IPEDS homepage at: http://nces.ed.gov/ipeds.

We hope you enjoy the rest of the summer and thank you in advance for your assistance in making IPEDS a success. If you need additional information, please call the Help Desk at 1-877-225-2568 or email them at ipedshelp@rti.org.

Best regards,

Tara Lawley
Program Director, Integrated Postsecondary Education Data System
Postsecondary Branch, Administrative Data Division
National Center for Education Statistics

Exhibit 9. Password Email to Multi-Keyholders
Subject: IPEDS Temporary Password

Previously, you were emailed registration information for the 2023-24 IPEDS Data Collection, including your UserID. For security purposes, your password is now being emailed separately.

Your password for registering in the IPEDS Data Collection System is listed below. This is a temporary password and you will need to create a new password when logging in.

Password: <mark><Password></mark>

If you need assistance logging in, or if you did not receive the email containing your UserID, please contact the Help Desk by replying to this email or by calling 1-877-225-2568.

The IPEDS data collection system is located at: https://surveys.nces.ed.gov/ipeds/

IPEDS Help Desk
Toll Free 1-877-225-2568
ipedshelp@rti.org

Exhibit 10. Registration Email to Coordinators
Subject: IPEDS 2023-24 Registration Information - <mark><UserID></mark>

August 9, 2023

Dear IPEDS Coordinator:

Welcome! Once again, it is time to issue UserIDs/Passwords and prepare for the upcoming 2023-24 collection year. At this time, most of the data from the 2022-23 IPEDS web-based data collection are currently available through the IPEDS Data Tools (at the Collection level) and we are continuing to update the College Navigator website.

At the bottom of this email is a copy of what is being sent to the keyholders who were registered last year. Please take time to read it because it contains additional information that is NOT in your email. As you can see, we continue to emphasize compliance with the Title IV requirements.

The Coordinator UserID is the same as it has been in prior years.

The password needed to access the IPEDS web-based data collection system for the 2023-24 collection cycle **will be sent separately,** shortly after this email. This is a TEMPORARY password and you will need to create a new password when logging in.

* *
UserID: <mark><UserID></mark>
Temporary Password: This is being sent in a separate email
* *

If you need assistance logging in, or if you did not receive the email containing your password, please contact the Help Desk by replying to this email or by calling 1-877-225-2568.

Online Registration is now open. Coordinators must register at http://surveys.nces.ed.gov/IPEDS. Please confirm your registration for 2023-24 after logging in and changing your password. You should verify or update your specific contact information, and make sure that your email address is correct since this will be used for ALL further contact during the data collection. If your office has more than one person who will need access to the system, you may request up to sixteen (16) additional UserIDs and Passwords when you register. All additional users will again be required to register this year.

The following is provided to help you plan for the 2023-24 IPEDS data collection.

2023-24 Data Collection

Schedule for the 2023-24 Data Collection: https://surveys.nces.ed.gov/ipeds/public/data-collection-schedule
Changes to the 2023-24 Survey Components:
https://surveys.nces.ed.gov/ipeds/ViewIPEDSChangesToTheCurrentYear.aspx For more information, use the Help menu in the data collection system.

A quick overview of the 2023-24 IPEDS data collection is provided below:

IMPORTANT NOTE: There are significant changes to the survey forms for this collection year. Please review these changes at https://surveys.nces.ed.gov/ipeds/ViewIPEDSChangesToTheCurrentYear.aspx before completing the survey components. Please also review the survey materials at https://surveys.nces.ed.gov/ipeds/VisIndex.aspx to view these changes.

Registration Period 2023-24 (Registration, Institution Mapping, Institution Identification, IC Header)
During the registration period (August 9, 2023-August 30, 2023), institutions are encouraged to complete the Institution Identification page, the Institution Mapping (if applicable), and the IC Header questions. These three items must be completed before the Fall survey components can be started. The IC Header is available until the end of the Fall collection. Institution Identification is available through Spring.

Fall 2023 (Institutional Characteristics, Completions, and 12-month Enrollment):
Opens September 6, 2023
Closes October 18, 2023 for Keyholders and November 2, 2022 for Coordinators

Winter 2023-24 (Student Financial Aid, Graduation Rates, 200% Graduation Rates, Admissions, and Outcome Measures):
Opens December 6, 2023
Closes February 7, 2024 for Keyholders and February 22, 2023 for Coordinators

Spring 2024 (Fall Enrollment, Finance, Human Resources, and Academic Libraries):
Opens December 6, 2023
Closes April 3, 2024 for Keyholders and April 19, 2023 for Coordinators

For your convenience in preparing for the upcoming collections, ALL survey forms, instructions, file import specifications and FAQs for the 2023-24 surveys are available through the data collection system (select Help, then Survey Materials). The IPEDS Coordinator Manual and a New Keyholder Handbook are available through the Help menu of the Data Collection System.

We hope that you enjoy the rest of the summer and thank you in advance for your continued support in making IPEDS successful. If you need additional information or help with registration, please call the IPEDS Help Desk at 1-877-225-2568 or email them at ipedshelp@rti.org. If you have questions about Coordinator roles and responsibilities within IPEDS, please contact Tara Lawley at 202-245-7081 or Tara.Lawley@ed.gov.

Best regards,

Tara Lawley
Program Director, Integrated Postsecondary Education Data System
Postsecondary Branch, Administrative Data Division
National Center for Education Statistics

* * * *** *** *** *** *** *** *** *** *** *** *** *** *** *** *** ***
Below is the text for the email being sent to Keyholders:
* * * *** *** *** *** *** *** *** *** *** *** *** *** *** *** *** ***

Subject: IPEDS 2023-24 Registration Information - <mark>\<UnitID\></mark>

August 9, 2023

Dear IPEDS Keyholder:

Welcome back! The National Center for Education Statistics is finalizing preparations for the 2023-24 IPEDS data collection. At the end of the Spring 2023 collection period, you were registered as the keyholder for your institution. If you will continue to serve as the keyholder for the upcoming 2023-24 collection cycle, please be sure to register as directed below. If you will NOT be serving as the keyholder for this collection year, please forward this email to your Chief Executive Officer so that another keyholder can be assigned.

The success of the IPEDS data collection and quality of the IPEDS data depend, in large part, on your efforts. Thank you in advance for your work this coming year.

The importance of your institution's compliance with the IPEDS reporting responsibility cannot be overstated. As you know, responses to the IPEDS surveys are mandated for those institutions that participate or expect to participate in Title IV federal financial aid programs under Section 487(a)(17) of the Higher Education Act of 1965, as amended, (HEA), 20 U.S.C. §1094(a)(17) and the Department of Education's (Department) regulations at 34 C.F.R. §668.14(b)(19). As a condition of continued participation in the federal student aid programs, all institutions must complete, in a timely manner and to the satisfaction of the Secretary, all surveys conducted as a part of the Integrated Postsecondary Education Data System. According to the Office of Federal Student Aid (FSA), an institution's failure to complete and submit these surveys is a serious violation of its obligations under the HEA and the regulations, and appropriate action, including warnings, fines, and possible loss of eligibility for Title IV federal student financial aid programs, will be taken by that office.

The Department of Education relies on postsecondary institutions to accurately report data to IPEDS, and nearly all institutions do. Institutions themselves sometimes identify misreporting issues and work with ED to correct those problems without the need for further action by the Department. The Department is concerned about any instances of intentional or significant misreporting. Under these circumstances, the Office of Federal Student Aid may take administrative action to appropriately address the issue.

Keyholder Registration:
The keyholder's UserID is the same as it has been in prior years.

The password needed to access the IPEDS web-based data collection system for the 2023-24 collection cycle **will be sent separately,** shortly after this email. This is a TEMPORARY password and you will need to create a new password when logging in.

* *
Institution: <mark>\<Institution_Name\></mark>
UserID: <mark>**\<UserID\>**</mark>
Temporary Password: This is being sent in a separate email
* *

If you need assistance logging in, or if you did not receive the email containing your password, please contact the Help Desk by replying to this email or by calling 1-877-225-2568.

The registration site opens August 9, 2023. Keyholders must register online at: http://surveys.nces.ed.gov/IPEDS by **August 30, 2023**. In order to ensure that each institution is registered, we will send reminder letters to CEOs of Title IV institutions if the keyholder is not registered by the August 30 date.

When registering in the system, please be sure that your registration information is correct. Verify your phone number and make sure that your email address is correct, since these will be used for ALL further contact during the data collection. You may also designate a different keyholder at this time and you may request additional IDs and passwords for other users if your institution has more than one person who will need access to the system. You may request up to sixteen (16) additional UserIDs and passwords when you register. All additional users will be required to register, but only the keyholder must register by August 30.

2023-24 Data Collection

Schedule for the 2023-24 Data Collection: https://surveys.nces.ed.gov/ipeds/public/data-collection-schedule
Changes to the 2023-24 Survey Components: https://surveys.nces.ed.gov/ipeds/ViewIPEDSChangesToTheCurrentYear.aspx. For more information, use the Help menu in the data collection system.

A quick overview of the 2023-24 IPEDS data collection is provided below:

IMPORTANT NOTE: There are significant changes to the survey forms for this collection year. Please review these changes at https://surveys.nces.ed.gov/ipeds/ViewIPEDSChangesToTheCurrentYear.aspx before completing the survey components. Please also review the survey materials at https://surveys.nces.ed.gov/ipeds/VisIndex.aspx to view these changes.

Registration Period 2023-24 (Registration, Institution Mapping, Institution Identification, IC Header)
During the registration period (August 9, 2023 -August 30, 2023), institutions are encouraged to complete the Institution Identification page, the Institution Mapping (if applicable), and the IC Header questions. These three items must be completed before the Fall survey components can be started. The IC Header is available until the end of the Fall collection. Institution Identification is available through Spring.

Fall 2023 (Institutional Characteristics, Completions, and 12-month Enrollment):
Opens September 6, 2023
Closes October 18, 2023 for Keyholders

Winter 2023-24 (Student Financial Aid, Graduation Rates, Graduation Rates 200, Admissions, and Outcome Measures):
Opens December 6, 2023
Closes February 7, 2024 for Keyholders

Spring 2024 (Fall Enrollment, Finance, Human Resources, Academic Libraries):
Opens December 6, 2023
Closes April 3, 2024 for Keyholders

For your convenience in preparing for the upcoming collections, ALL survey forms, instructions, file import specifications, and FAQs for the 2023-24 surveys are available through the data collection system (select Help, then Survey Materials). A New Keyholder Handbook is also available in the Help menu; even though you are a veteran IPEDS keyholder, this resource may be useful to you.

Data Availability for 2022-23 Collection:
Data submitted by institutions during the 2022-23 IPEDS Fall, Winter, and Spring collections are currently available through the IPEDS Use the Data tools (at the Collection level).   Additionally, we continue to update the College Navigator website with new data as they become available. These tools can be accessed from the IPEDS homepage at: http://nces.ed.gov/ipeds.

We hope you enjoy the rest of the summer and thank you in advance for your assistance in making IPEDS a success. If you need additional information, please call the Help Desk at 1-877-225-2568 or email them at ipedshelp@rti.org.

Best regards,

Tara Lawley
Program Director, Integrated Postsecondary Education Data System
Postsecondary Branch, Administrative Data Division
National Center for Education Statistics

Exhibit 11. Password Email to Coordinators
Subject: IPEDS Temporary Password

Previously, you were emailed registration information for the 2023-24 IPEDS Data Collection, including your UserID. For security purposes, your password is now being emailed separately.

Your password for registering in the IPEDS Data Collection System is listed below. This is a temporary password and you will need to create a new password when logging in.

Password: <mark><Password></mark>

If you need assistance logging in, or if you did not receive the email containing your UserID, please contact the Help Desk by replying to this email or by calling 1-877-225-2568.

The IPEDS data collection system is located at: https://surveys.nces.ed.gov/ipeds/

IPEDS Help Desk
Toll Free 1-877-225-2568
ipedshelp@rti.org

Exhibit 12. Vendor Notification of Survey Materials Updates

Subject: IPEDS Information for Software Providers

August 9, 2023

The 2023-24 IPEDS survey materials are now available from the IPEDS Data Provider Center at https://nces.ed.gov/ipeds/report-your-data. These include blank forms, instructions, import specifications, and Frequently Asked Questions for each IPEDS survey component.

Also, under the "About the Data Collection" heading in the Data Provider Center is a tutorial on "Using the Data Collection System," which includes information on how uploaded data are processed by the system.

Tara Lawley
Program Director, Integrated Postsecondary Education Data System
Postsecondary Branch, Administrative Data Division
National Center for Education Statistics

**Note: You are receiving this email because you registered your email address on the IPEDS "Resources for Software Providers" page, at: https://nces.ed.gov/ipeds/report-your-data/resource-software-providers

Exhibit 13. New Keyholder Welcome Package/Email
Subject: IPEDS Information for New Keyholders
<No specific date—Will be sent automatically as new Keyholders register>

Dear IPEDS Keyholder:

Welcome to IPEDS! As a new IPEDS Keyholder, you have an important job. The quality and accuracy of your institution's IPEDS data depend on you.

IPEDS data are a public face of your institution, and are widely used. They are used by students and parents, through the College Navigator website, the College Scorecard, and on the FAFSA form, to aid in the college search process; by federal, state, and local governments for policy analysis and development; by institutions for benchmarking and peer analysis; and by professional associations, private businesses, and the media. In a minute we'll talk about how you can access the IPEDS data you submit for use at your campus.

Resources:
The Report Your Data website, at http://nces.ed.gov/ipeds/Home/ReportYourData, has all the information you'll need to submit your IPEDS data. This information can also be found from the Help menu in the Data Collection System.

The IPEDS New Keyholder Handbook provides an easy way to get oriented to IPEDS. This manual includes a lot of useful information, including information on keyholder responsibilities, how to submit and lock your data, where to get help and training, and tips from veteran keyholders and the Help Desk, all collected in one place for easy reference.

The first thing we suggest you do to get ready to submit IPEDS data is to familiarize yourself with the data collection schedule for the year. The 2023-24 data collection schedule is shown below. Also, attached to this email is a calendar that you can print out and post on your bulletin board for easy reference, and forward to others in your institution who help with IPEDS data submission. Please remember that deadline extensions are NOT available.

Fall 2023:	September 6, 2023 – October 18, 2023
Winter 2023-24:	December 6, 2023 – February 7, 2024
Spring 2024:	December 6, 2023 – April 3, 2024

Next, you'll probably want to familiarize yourself with the data you'll need to submit. Using the Survey Materials option, you can access blank survey forms, instructions, FAQs, and edit and import specifications, so that you can prepare your data for submission, and alert others at your institution to the data you'll need them to provide to you for submission.

IMPORTANT NOTE: While there are no significant changes to the survey forms for this collection year, there are several clarifications to instructions and FAQs. Please review these changes at https://surveys.nces.ed.gov/ipeds/ViewIPEDSChangesToTheCurrentYear.aspx before completing the survey components. Please also review the survey materials at https://surveys.nces.ed.gov/ipeds/VisIndex.aspx to view these changes.

Seasoned keyholders will tell you that it's best to start early so that you aren't trying to find and report all the data in a last-minute crunch. Also, if you submit your data prior to the last three weeks before data collection closes, we'll send an email to your president or CEO alerting them to your accomplishment.

Finally, the most important resource will be the IPEDS Help Desk, which can be reached at 1-877-225-2568, or ipedshelp@rti.org. If you have any questions about IPEDS, please contact them for assistance. They're there to help you get your IPEDS data submitted accurately and on time.

Training opportunities:
There are free, specialized training materials to assist you with your IPEDS reporting responsibilities. There is an online tutorial specifically for new keyholders that provides an overview of keyholder responsibilities and how the IPEDS data submission process works. There are other online tutorials that will assist you in understanding the key concepts you need to know in order to accurately submit data for the different survey forms. We encourage you to check out the one specifically designed for new keyholders now, and to view the key concepts tutorials as you prepare to report the different surveys. Follow the link from https://nces.ed.gov/ipeds/join-in/training-and-outreach, then click on "AIR's Online Video Tutorials."

Free face-to-face workshops are also held in various parts of the country throughout the year. Watch for special email announcements.

Data Dissemination:
The data you submit to IPEDS are made available to the public through the IPEDS online data use tools:
- Your institution will be included on the College Navigator website (http://collegenavigator.ed.gov), a college search tool designed for parents, prospective students, and high school counselors.
- The IPEDS Data Feedback Report (DFR), produced annually, compares your institution to a group of similar institutions on a number of indicators. This report is sent to you and your institution's CEO, but is available to anyone through the Use the Data website http://nces.ed.gov/ipeds/Home/UseTheData).
- IPEDS data are tabulated at the national, state, and sector level; tables are available through the Tables Library (http://nces.ed.gov/datalab/tableslibrary/home.aspx).
- And you can access data for your institution and all other IPEDS-participating institutions at the IPEDS Use the Data website (http://nces.ed.gov/ipeds/Home/UseTheData), where you can compare institutional data, create reports, download data files, and more!

The IPEDS Data Tools Help Desk is available to answer questions about all these tools, and can be reached at 1-866-558-0658 or ipedstools@rti.org.

Finally, thank you in advance for your work during the 2023-24 IPEDS Data Collection. If you need additional information, please call the Help Desk at 1-877-225-2568 or email them at ipedshelp@rti.org .

Best regards,

Tara Lawley
Program Director, Integrated Postsecondary Education Data System
Postsecondary Branch, Administrative Data Division
National Center for Education Statistics

Exhibit 14. Registration +2 Weeks Keyholder Reminder Email
Subject: IPEDS Reminder- Keyholder Registration Required – <mark><UnitID></mark>

August 23, 2023

Dear Keyholder:

As of this morning, you have not registered as Keyholder for the upcoming 2023-24 IPEDS collection. Please remember that all Keyholders must register by August 30 in order to avoid a reminder letter being sent to the institution's Chief Executive. For your convenience, a copy of the email that was sent to you on August 9, which contains your registration information, is included below. If you will not be the keyholder for this collection year, please forward this email to the appropriate person(s). Thank you for your prompt attention to this matter.

The registration site is available at: http://surveys.nces.ed.gov/ipeds/

Once you have registered, all 2023-24 survey forms, instructions, upload specifications, and other information can be accessed through the Help menu (click on Survey Materials) in the data collection system.

The Fall data collection will open on September 6, 2023.

IPEDS Help Desk
Toll Free 1-877-225-2568
ipedshelp@rti.org

<mark>**NOTE: A copy of the original registration email will be attached below.**</mark>

Exhibit 15. Annual Update Email to CEOs of IPEDS Institutions

*Note: Keyholders and Coordinators will be copied

Subject: Integrated Postsecondary Education Data System (IPEDS) - <mark><UnitID></mark>

August 30, 2023

Dear Chief Executive Officer –

Please read this email. It has important implications for your institution and its responsibilities related to awarding federal student aid.

The annual Integrated Postsecondary Education Data System (IPEDS) data collection for 2023-24 has begun. Thank you in advance for your assistance in this important data collection effort. This letter serves to inform or remind you about some important aspects of the IPEDS program.

Importance of submitting <u>accurate</u> and <u>timely</u> IPEDS data
The completion of all IPEDS surveys in a timely and accurate manner is mandatory for all institutions that participate in or are applicants for participation in any federal financial assistance program authorized by Title IV of the Higher Education Act of 1965, as amended. Submitting IPEDS data accurately and on time is required by your Program Participation Agreement for Title IV federal student financial aid programs with the U.S. Department of Education. In this way, your institution will avoid fines and other possible penalties for noncompliance with IPEDS reporting requirements.

Additionally, IPEDS data are a public face of your institution.
- IPEDS data are used in the **College Navigator** (http://nces.ed.gov/collegenavigator/) consumer information and college search tool, designed to help college students, prospective students, and their parents understand the differences between colleges and how much it costs to attend college.
- IPEDS data are displayed on the **FAFSA online** form. As potential students apply for financial aid, they can see the tuition and fees, average net price, graduation rates, retention rates, and transfer rates for schools as reported through IPEDS.
- IPEDS data are used, in conjunction with other federal data sources, in the **College Scorecard** (https://collegescorecard.ed.gov/). This consumer tool provides information on colleges including average annual cost to attend, fields of study offered, earnings of graduates, and more.
- IPEDS data are also used for the **College Affordability and Transparency Center** (http://collegecost.ed.gov), which lists institutions with the highest and lowest tuition and fees as well as highest and lowest net prices (the price of attendance minus grant and scholarship aid). It also shows institutions where tuition and fees and net prices are increasing at the highest rates; institutions on these lists are subject to additional reporting to the US Department of Education. The lists are made from the IPEDS data your institution submits.
- The **IPEDS Data Feedback Report** provides each institution a context for examining the data they submitted to IPEDS. The goal is to produce an annual report that is useful to institutional executives and institutions for benchmarking and peer analysis, and that can help improve the quality and comparability of IPEDS data. The report is mailed to Chief Executive Officers each fall. PDF versions of the reports are available to institutions and the public from the IPEDS Use the Data website (http://nces.ed.gov/ipeds/Home/UseTheData).

The role of the IPEDS Keyholder

Each institution has an IPEDS Keyholder, who was appointed by you or your predecessor. This is the person who is responsible for making sure all IPEDS data are submitted accurately and on time. In fact, the success of the IPEDS data collection and quality of the IPEDS data depend, in large part, on the efforts of your institution's Keyholder. Many different offices and records systems are typically involved in IPEDS reporting (institutional research, registrar, admissions, financial aid, business, personnel, information technology), so the Keyholder is often called on to act as a data coordinator in order to make sure all IPEDS reporting requirements are met. IPEDS data are submitted throughout the year, during the Fall, Winter, and Spring data collection periods.

How you can help

You can support your Keyholder by helping to make sure all offices involved in IPEDS reporting are aware of the importance of data quality and timeliness. You should also know that it requires a significant amount of time to complete your institution's IPEDS submissions; you can view the IPEDS reporting burden estimates at https://surveys.nces.ed.gov/ipeds/public/institutional-burden

Finally, it might be important to make sure the Keyholder has time to attend IPEDS training through online tutorials, webinars, and face-to-face workshops; the training provided through our contractor, the Association for Institutional Research, is free (https://www.airweb.org/collaborate-learn/ipeds-training).

If you have questions

Thank you for your attention to this message. If you have questions, please contact Tara Lawley, Team Lead, IPEDS Operations, at Tara.Lawley@ed.gov

Sincerely,

Tara Lawley
Program Director, Integrated Postsecondary Education Data System
Postsecondary Branch, Administrative Data Division
National Center for Education Statistics

Exhibit 16. Registration +3 Weeks Reminder Letter to CEOs (MOVED TO FALL FOR 2023-24; SEE)

Exhibit 17. Annual Update Email to IPEDS Coordinators

Subject: IPEDS Update - Important Information for Coordinators

August 30, 2023

Dear IPEDS Coordinator:

Welcome back to IPEDS! The 2023-24 data collection year is now underway, and the Fall collection opens next week. As we begin this collection year, we'd like to thank you for your continued support of IPEDS. We are well aware of the many contributions, and long hours of work, that go into making sure the data provided by your institutions are timely and accurate.

Last year was a busy year. This year, changes are minimal, but please review the instructions carefully and contact the Help Desk for any clarification.

Details on all changes implemented in 2023-24 are available at:
https://surveys.nces.ed.gov/ipeds/ViewIPEDSChangesToTheCurrentYear.aspx

The data collection periods are scheduled as follows:

Fall 2023:	September 6, 2023 – October 18, 2023
Winter 2023-24:	December 6, 2023 – February 7, 2024
Spring 2024:	December 6, 2023 – April 3, 2024

Reminder regarding the **Net Price Calculator:** Section 132 of the Higher Education Act of 1965 (P.L. 110-315), as amended, requires that every institution's Net Price Calculator be updated annually. Please work with your institutions to ensure that this happens. The IPEDS template, including the most recent aid data information, is available at: http://nces.ed.gov/ipeds/resource/net_price_calculator.asp

State coordinators should view the report (within the collection system, accessible at https://surveys.nces.ed.gov/IPEDS/) entitled "State List of Institutions not Coordinated by Your Office" in order to determine if there are any institutions new to IPEDS that need to be added to your coordination list.

Much more information is available in the Coordinator Manual, which is located within the Data Collection System under the Tools menu. We encourage you to take a look!

As always, please contact the IPEDS Help Desk at 1-877-225-2568, or ipedshelp@rti.org, if you need to add or delete institutions in your coordination list, or need to modify locking orders for any of your institutions.

Thanks again, and we look forward to another year of working with you.

Tara Lawley
Program Director, Integrated Postsecondary Education Data System
Postsecondary Branch, Administrative Data Division
National Center for Education Statistics

Section 2: Communications sent after collection opening

Exhibit 1 outlines the overall schedule of our planned coordination and collection communications throughout the collection cycle. **Exhibits 2 through 39** include the draft text for (a) collection opening announcements, (b) reminder emails and letters to keyholders of non-registered users, (c) reminder emails to keyholders of non-respondent institutions, (d) thank-you emails to CEOS of early-completing institutions, (e) phone scripts to be used when calling CEOs and keyholders of non-respondent institutions, and (f) email communication regarding changes in the Prior Year Revision (PYR) system.

Exhibit 1. IPEDS 2023-24 Data Collection Communications and Follow-Up Schedule
Fall Collection

Date	Correspondence Type	Scheduled Time	Recipient(s)	Communication Criteria
9/6/23	Opening announcement	Collection opening	Keyholders/ Coordinators	All
Ongoing	Thank you email	At time of survey locking	Keyholders/ Coordinators	All locked surveys
9/13/23	Email regarding changes in the PYR	PYR collection opening	Keyholders/ Coordinators	Identified during previous year QC process
9/13/23	One Last Chance Reminder	1 week following collection opening	CEOs/Keyholders	CEOs of schools having already used OLC
9/20/23	Prompting email	4 weeks prior to collection closing	Keyholders	No data entered
9/20/23	Prompting email	4 weeks prior to collection closing	New Keyholders	All required surveys not locked
9/27/23	Thank You email	3 weeks prior to collection closing	CEOs/Keyholders	All surveys completed
9/27/23	Prompting phone call	4 weeks prior to collection closing	CEOs	No keyholder registered
10/04/23	Prompting phone call	2 weeks prior to collection closing	Keyholders/CEOs	No data entered
10/04/23	Prompting email	2 weeks prior to collection closing	Keyholders	No data entered
10/04/23	Prompting email	2 weeks prior to collection closing	Keyholders	All required surveys not locked
10/04/23	Prompting phone call	2 weeks prior to collection closing	New Keyholders	All required surveys not locked
10/11/23	Prompting email	1 week prior to collection closing	Keyholders	No data entered
10/11/23	Prompting email	1 week prior to collection closing	Keyholders	All required surveys not locked

Winter collection

Date	Correspondence Type	Scheduled Time	Recipient(s)	Communication Criteria
12/6/23	Opening announcement	Collection opening	Keyholders/Coordinators	All
12/6/23	Email regarding changes in the PYR	PYR collection opening	Keyholders/Coordinators	Identified during previous year QC process
1/10/24	Prompting registration letter	4 weeks prior to collection closing	CEOs	No keyholder registered
1/10/24	Prompting email	4 weeks prior to collection closing	Keyholders	No data entered
1/10/24	Prompting email	4 weeks prior to collection closing	New Keyholders	All required surveys not locked
1/17/24	Thank You email	3 weeks prior to collection closing	CEOs/Keyholders	All surveys completed
1/17/24	Prompting phone call	3 weeks prior to collection closing	CEOs	No Keyholder registered
1/24/24	Prompting phone call	2 weeks prior to collection closing	Keyholders/CEOs	No data entered
1/24/24	Prompting email	2 weeks prior to collection closing	Keyholders	No data entered
1/24/24	Prompting email	2 weeks prior to collection closing	Keyholders	All required surveys not locked
1/24/24	Prompting phone call	2 weeks prior to collection closing	New Keyholders	All required surveys not locked
1/31/24	Prompting email	1 week prior to collection closing	Keyholders	No data entered
1/31/24	Prompting email	1 week prior to collection closing	Keyholders	All required surveys not locked

Spring collection

Date	Correspondence Type	Scheduled Time	Recipient(s)	Communication Criteria
12/6/23	Opening announcement	Collection opening	Keyholders/Coordinators	All
12/6/23	Email regarding changes in the PYR	PYR collection opening	Keyholders/Coordinators	Identified during previous year QC process
2/7/24	Prompting emails (included in TWII)	8 weeks prior to collection closing	Keyholders	No data entered
2/21/24	Prompting emails (included in TWII)	6 weeks prior to collection closing	Keyholders	No data entered
3/6/24	Prompting registration letter	4 weeks prior to collection closing	CEOs	No keyholder registered
3/6/24	Prompting email	4 weeks prior to collection closing	Keyholders	No data entered
3/6/24	Prompting email	4 weeks prior to collection closing	New Keyholders	All required surveys not locked
3/13/24	Thank You email	3 weeks prior to collection closing	CEOs/Keyholders	All surveys completed
3/13/24	Prompting phone call	3 weeks prior to collection closing	CEOs	No Keyholder registered
3/13/24	Prompting email	3 weeks prior to collection closing	Keyholders	No data entered since Winter
3/20/24	Prompting phone call	2 weeks prior to collection closing	Keyholders/CEOs	No data entered since Winter
3/20/24	Prompting phone call	2 weeks prior to collection closing	Keyholders/CEOs	No data entered
3/20/24	Prompting email	2 weeks prior to collection closing	Keyholders	No data entered
3/20/24	Prompting email	2 weeks prior to collection closing	Keyholders	All required surveys not locked
3/20/24	Prompting phone call	2 weeks prior to collection closing	New Keyholders	All required surveys not locked
3/27/24	Email to keyholder	1 week prior to collection closing	Keyholders	No data entered
3/27/24	Prompting email	1 week prior to collection closing	Keyholders	All required surveys not locked

Exhibit 2. Fall Opening Announcement Email
Subject: IPEDS Fall Data Collection Now Open

September 7, 2022

The Fall 2022 IPEDS web-based data collection is now open, and will remain open to Keyholders through October 19, 2022.

You can access the collection site at: http://surveys.nces.ed.gov/ipeds OR you may use the main IPEDS website at http://nces.ed.gov/ipeds and follow the links to "Report Your Data."

- Use your 2022-23 UserID and password (emailed to you, or mailed to your institution's CEO, in early August). Keyholder UserIDs begin with "P" or "88G."
- If you have a keyholder change, be sure to change the contact information in the registration screen, which can be found under the Tools menu.
- All institutions MUST complete and lock the Institutional Characteristics (IC) component, the Completions (C) component, and 12-month Enrollment (E12) component. The IC Header component must be locked before you can begin submitting data for the Fall components.

Note that the collection will close on October 19, 2022. You will not be able to submit, edit, or lock data after those dates and NO extensions can be granted.

The following assistance is available to you as you prepare your institution's data submissions:

- The IPEDS Help Desk is available to assist you at any time during the collection cycle. Please contact the Help Desk at 1-877-225-2568 or ipedshelp@rti.org if you have any questions about the IPEDS system.

- Copies of the survey forms, instructions, file upload specifications, and frequently asked questions are available in the collection system under the Help menu, click on Survey Materials.

- The Association for Institutional Research (AIR) has free IPEDS training tutorials available. Follow the link from http://nces.ed.gov/ipeds/InsidePages/JoinIn?pageid=37, then click on "AIR's Online Video Tutorials."

Remember that the completion of all IPEDS surveys, in a timely and accurate manner, is mandatory for all institutions that participate in or are applicants for participation in any Federal financial assistance program authorized by Title IV of the Higher Education Act (HEA) of 1965, as amended. IPEDS surveys are mandated by 20 U.S.C. 1094(a)(17). Institutions have been fined for failing to submit complete surveys on time. Title IV, HEA program regulations 34 CFR 668.84, 668.85, and 668.86 permit a fine of up to $59,017 for each violation.

To assist you in meeting this requirement, NCES has established a rigorous follow-up schedule. PLEASE DO NOT IGNORE EMAIL CORRESPONDENCE. You will be prompted ONLY IF YOUR SURVEY SUBMISSIONS ARE NOT COMPLETE.

In order to complete all requirements for data submission, keyholders must LOCK each survey.
- Under "Steps to Locking," be sure to run "Perform Edits" and resolve any errors.
- When activated (underlined), click "Lock" and follow the instructions.
- Please be sure to check your Survey status to make sure that it reads Locked or Complete after you have locked your data.
- Use the "Am I Done" feature to ensure that you have completed all required surveys.

Please be sure to provide a current email address for your institution's Chief Executive (CEO) on your Institution Identification page, as it may be necessary to send IPEDS-related information to your CEO. Keyholders will always be copied on any such email correspondence. For example, NCES will send an email acknowledgement to the Chief

Executive Officer (CEO) of those institutions that lock all of their required survey components prior to the final three weeks of the collection. Although we realize that it is not always possible for the IPEDS data to be submitted this early, we do appreciate the efforts of those individuals who can, and do, complete their data entry early in the collection. As such, we want to recognize the efforts of those individuals.

You can also correct or update any data that were submitted during last year's collection using the IPEDS Prior Year Data Revision (PYR) system at http://surveys.nces.ed.gov/ipeds_py/. Use your current UserID and password for access. The PYR will open on September 14, 2022.

Finally, please note that Keyholders may "opt out" of receiving some of the scheduled IPEDS reminders during the collection. To participate in the "opt out" opportunity, login to the collection system, go to the Tools menu and select "Follow-up Opt Out". After reading the instructions, choose the radio button as appropriate. This action must be repeated for EACH collection period, if you choose to continue opting out. Note that new Keyholders cannot opt out, and all IPEDS compliance requirements still apply (e.g., institutions will not be granted extensions for failure to meet the reporting deadline).

Remember, if you have any questions or need help at any time during the collection cycle, you can contact the Help Desk at 1-877-225-2568, or send them an email at ipedshelp@rti.org.

Best regards,

Tara Lawley
Program Director
Integrated Postsecondary Education Data System
National Center for Education Statistics

Exhibit 3. One Last Chance Reminder Email to CEOs
Subject: IPEDS Notification Regarding Late Submission of Data - [unitid]

September 15, 2022

Dear Chief Executive Officer:

As you know, completion of the Integrated Postsecondary Education Data System (IPEDS) survey components is a requirement of your institution's continued participation in Title IV Federal student financial aid programs. The National Center for Education Statistics (NCES) is charged with conducting the IPEDS data collection, and provides support to participating institutions in this effort. Toward this end, NCES grants every institution ONE (and only one) opportunity to submit survey data beyond the specified deadline for any of the three annual IPEDS data collection periods.

Your institution, <institution_name>, benefitted from this "one opportunity" during the <period_year> data collection. During that collection period, the IPEDS Help Desk accepted post-deadline data and entered it into the IPEDS data collection system on behalf of your institution. This letter serves as a reminder that NCES will not again accept late data during this, the 2022-23 data collection year, or future data collection years. We are copying your institution's IPEDS keyholder, <KH_name>, on this letter so that he or she is also aware of this notification.

The importance of your institution's compliance with this reporting responsibility cannot be overstated. Please be aware that responses to the IPEDS surveys are mandated for those institutions that participate or expect to participate in Title IV federal financial aid programs under Section 487(a)(17) of the Higher Education Act of 1965, as amended (HEA), 20 U.S.C. §1094(a)(17) and the Department of Education's regulations at 34 C.F.R. §668.14(b)(19). As a condition of continued participation in the federal student aid programs, all institutions must complete, in a timely manner and to the satisfaction of the Secretary, all surveys conducted as a part of the IPEDS. Title IV, HEA program regulations 34 CFR 668.84, 668.85, and 668.86 permit a fine of up to $59,017 for each violation. According to the Office of Federal Student Aid (FSA), an institution's failure to complete and submit these surveys is a serious violation of its obligations under the HEA and the regulations, and appropriate action will be taken by FSA.

If you have any questions about this issue, please feel free to contact the IPEDS Help Desk at 1-877-225-2568 or ipedshelp@rti.org for further information or clarification.

Sincerely,

Ross C. Santy
Associate Commissioner
Administrative Data Division
National Center for Education Statistics

CC: Keyholder_Name

Exhibit 4. Fall Registration Close -4 Weeks Reminder Letter to CEOs

<NCES Letterhead>

September 21, 2022

<mark>ceo_name</mark>
<mark>ceo_title</mark>
<mark>institution_name</mark>
<mark>addr1_txt</mark>
<mark>city_txt</mark>, <mark>state_cd</mark> <mark>zip_text</mark>

Dear Chief Executive Officer:

Your institution currently does not have a designated keyholder for the 2022-23 IPEDS data collection cycle; please appoint one at this time, and forward the enclosed materials to that individual. The success of the IPEDS data collection and quality of the IPEDS data depend, in large part, on the efforts of your institution's keyholder.

The keyholder is responsible for your institution's data submission and should be someone who is familiar with the IPEDS data collection. This person is responsible for all three collections— Fall 2022, Winter 2022-23, and Spring 2023. The enclosed materials provide the information your appointed keyholder will need to register prior to entering data into the system. Once your keyholder registers, all future correspondence will go directly to him or her.

The importance of your institution's compliance with this reporting responsibility cannot be overstated. Please be aware that responses to the IPEDS surveys are mandated for those institutions that participate or expect to participate in Title IV federal financial aid programs under Section 487(a)(17) of the Higher Education Act of 1965, as amended (HEA), 20 U.S.C. §1094(a)(17) and the Department of Education's regulations at 34 C.F.R. §668.14(b)(19). As a condition of continued participation in the federal student aid programs, all institutions must complete, in a timely manner and to the satisfaction of the Secretary, all surveys conducted as a part of the Integrated Postsecondary Education Data System. According to the Office of Federal Student Aid (FSA), an institution's failure to complete and submit these surveys is a serious violation of its obligations under the HEA and the regulations, and appropriate action will be taken by FSA.

Registration is currently open, and the data collection periods are scheduled as follows:

Fall 2022:	September 7, 2022 – October 19, 2022
Winter 2022-23:	December 7, 2022 – February 8, 2023
Spring 2023:	December 7, 2022 – April 5, 2023

The results of the 2021-22 Integrated Postsecondary Education Data System (IPEDS) web-based data collections are currently available through the IPEDS Use the Data tools (at the collection level) and the College Navigator website. Links to all of these data tools are on the IPEDS web site at http://nces.ed.gov/ipeds.

There is no need for you to respond to this letter. However, if you need any additional information or have any questions, please contact the IPEDS Help Desk toll free at 1-877-225-2568 (or send an email to ipedshelp@rti.org). Thank you in advance for your assistance in this important project.

Sincerely,

Ross C. Santy
Associate Commissioner
Administrative Data Division
National Center for Education Statistics

Attachments

*Includes Keyholder Letter and Registration Certificate

Exhibit 5. Fall Close -4 Weeks Reminder Email to Keyholders
Subject: IPEDS Reminder – Fall Collection Closes in Four Weeks

September 21, 2022

Dear IPEDS Keyholder:

Although there are four weeks remaining in the Fall 2021 IPEDS data collection, please be aware that we are scheduled to close promptly on October 19, 2022. Currently, our records indicate that you have not begun to enter information for the Fall surveys that are required of your institution (excluding IC Header). All institutions are required to complete the IC Header, Institutional Characteristics, Completions, and 12-Month Enrollment survey components.

While we understand that you are busy with many other responsibilities, we would strongly encourage you to enter and lock your data as soon as possible. As you know, under Section 487(a)(17) of the Higher Education Act of 1965, as amended, completion of the IPEDS surveys is an integral part of your institution's Program Participation Agreement (PPA) with the Department of Education.

We will be sending additional email reminders on October 5 and October 12. Also on October 5, we will begin calling the CEOs of institutions where keyholders have not begun entering data.

The IPEDS web-based collection system is located at: http://surveys.nces.ed.gov/ipeds and if you have questions concerning accessing the system, or entering, editing, or locking your data, please contact the Help Desk at 1-877-225-2568, or ipedshelp@rti.org.

Please do not disregard this email! If you believe that you have received this message in error, please contact the Help Desk. Thank you in advance for your assistance in this important project.

Best regards,

Tara Lawley
Program Director
Integrated Postsecondary Education Data System
National Center for Education Statistics

Exhibit 6. Fall Close -4 Weeks Reminder Email to NEW Keyholders
Subject: IPEDS Reminder – Fall Collection Closes in Four Weeks

September 21, 2022

Dear New IPEDS Keyholder:

Although there are four weeks remaining in the Fall 2022 IPEDS data collection, please be aware that we are scheduled to close promptly on October 19, 2022. Currently, our records indicate that you have not completed and locked all surveys that are required of your institution for this Fall collection. While you still have 4 weeks to complete them, we know you are busy with many other responsibilities, and we wanted to contact you so this important task doesn't slip your mind. All institutions are required to complete the Institutional Characteristics, the Completions, and the 12-Month Enrollment survey components.

When you registered in the IPEDS Data Collection System (DCS), you identified yourself as a new keyholder. As such, we wanted to be sure to highlight a few things:

- If you have not yet located and reviewed the blank forms and instructions for completing the surveys, please do so as soon as possible. They are available at https://surveys.nces.ed.gov/ipeds/VisIndex.aspx, Contact the IPEDS Help Desk if you need assistance with finding the correct forms.

- If you will have assistance from others at your institution in completing the Fall surveys, please contact those individuals and provide them with the blank forms, instructions, and due date. Also, consider generating and assigning additional UserID and passwords so that these individuals can access the Data Collection System directly. The Help Desk can assist you with this.

- We strongly encourage you to enter and lock your data as soon as possible. The Help Desk gets very busy toward the end of the collection, especially during the last few days, and it is harder to reach them. In order that they can answer any questions that you have, please do not wait until the last minute.

As you know, under Section 487(a)(17) of the Higher Education Act of 1965, as amended, completion of the IPEDS surveys is an integral part of your institution's Program Participation Agreement (PPA) with the Department of Education.

We will be sending additional email reminders on October 5 and October 12. Also on October 5, we will begin calling the CEOs of institutions where keyholders have not begun entering data.

The IPEDS web-based collection system is located at: http://surveys.nces.ed.gov/ipeds and if you have questions concerning accessing the system, or entering, editing, or locking your data, please contact the Help Desk at 1-877-225-2568, or ipedshelp@rti.org.

Please do not disregard this email! If you believe that you have received this message in error, please contact the Help Desk. Thank you in advance for your assistance in this important project.

Best regards,

Tara Lawley
Program Director
Integrated Postsecondary Education Data System
National Center for Education Statistics

Exhibit 7. Fall CEO Close -3 Weeks Early-Completer Thank-You Email
Subject: IPEDS Thanks You for Early Response - <UnitID>

September 28, 2022

Dear Chief Executive:

The National Center of Education Statistics, part of the U.S. Department of Education, would like to extend its appreciation to your institution, and especially to your IPEDS Keyholder, <keyholder_name>. As of today (three weeks prior to the close of the Fall data collection), all of the required IPEDS surveys for your institution, <institution name>, have been entered, edited, and locked.

Because IPEDS is a very large data collection involving a large number of institutions, completing the surveys and locking them early during the collection period is extremely helpful. Providing IPEDS data is a major undertaking, and we want you to know that we truly appreciate the timely response. We hope that you will pass along our word of gratitude to your Keyholder, as he or she is the one who is typically charged with overseeing the successful data entry and completion of the mandatory IPEDS surveys.

Again, please accept our thanks to you and your staff for your important contributions to the success of IPEDS.

Sincerely,

Tara Lawley
Program Director
Integrated Postsecondary Education Data System
National Center for Education Statistics

CC: Keyholder

Exhibit 8. Fall CEO Call Script for No Registered Keyholder

CEO Calls to Title IV Institutions - No Registered Keyholder
Guidelines and Script
Fall 2022

In an effort to get the remaining Title IV schools to register for IPEDS, beginning September 28th, we will be making calls to those schools who have not registered. We have outlined some guidelines to follow when making these calls. Each of you will be getting a list of schools to work sorted by sector.

Goals of these calls:
1. Get the school to register for IPEDS as soon as possible and remind them of the deadline for IPEDS submission of October 19th; or
2. Get a good reason for why the school should not be included in IPEDS

List of Sectors:
(0)   Central Office Administrative Unit
(1)   4-year public
(2)   4-year private, not-for-profit
(3)   4-year private, for-profit
(4)   2-year public
(5)   2-year private, not-for-profit
(6)   2-year private, for-profit
(7)   Less than 2-year public
(8)   Less than 2- year private, not-for-profit
(9)   Less than 2-year private, for-profit
(99)   New Institution

Guidelines to follow for contacting CEOs:

- Check Status of the school to see if it is still showing up as not registered. If they have registered since the list was generated, you do not need to call, but be sure to document why the call was NOT made.

- CHECK COMMENTS THOROUGHLY to see if there is any reason for the school not being registered. If a reason is given, you may not need to call them. For example, if they called us and said that they are no longer Title-IV, and the incident is pending review by project staff, you do not need to make the call.

- When you call the school, you will first ask to speak with the CEO (get his/her name from the Institution Identification page). If you cannot reach the CEO, please leave him/her a message but ALSO try to reach the Keyholder from last year (if there was one). Be sure to introduce yourself as being from the IPEDS help desk and state that you are following up regarding registration for the IPEDS data collection. An example script is shown below.

- In rare cases, the CEO may give you a reason why they do not think they need to register or participate in IPEDS. Keep good notes and document them in the Help Desk Application (HDA) thoroughly, then contact a project staff person.

- *You MAY also get some schools that submit combined data.* All schools need to submit their own IC, but other surveys can be combined, in specific situations. If the school is part of a parent-child relationship, but does not appear that way in the system, get the details of the arrangement so that we can set them up properly in the system.

Example script for contacting CEOs:

Hello, my name is _____, calling on behalf of the U.S. Department of Education concerning the IPEDS Fall Data Collection. May I speak with Dr./Mr./Ms. (CEO NAME)?

IF CEO IS UNAVAILABLE:
May I leave a message for Dr./Mr./Ms. (CEO NAME), or can you suggest a time at which I should call back?

LEAVE A MESSAGE THAT YOU CALLED AND ASK THAT THE CEO CALL THE IPEDS HOTLINE (877-225-2568) OR SET AN APPOINTMENT TO CALL BACK.

IF CEO IS AVAILABLE:
Hello Dr./Mr./Ms. (CEO NAME), I am calling concerning the IPEDS Fall Data Collection. In August and September, we sent letters to you requesting that you appoint a keyholder for IPEDS (Integrated Postsecondary Education Data System). Your keyholder has not registered for the Fall data collection which opened on September 7th . IF there is an unregistered keyholder in the system, tell the CEO who that person is. If not, ask: Have you appointed a keyholder?

IF YES:
        We need for the keyholder to register and begin data collection immediately in order to meet the October 19th deadline for the data collection. Would you be able to follow-up with the keyholder? Or if you prefer, you can give me the name and phone number of the keyholder and I will be happy to call them.

IF NO:
        We need for you to appoint a keyholder immediately so they can register and begin data collection. The deadline for the collection is October 19th. If you could give me the name and phone number of that person now, I will be happy to call them and provide them with the ID and password necessary for them to register and begin data collection.

        OBTAIN KEYHOLDER NAME AND PHONE NUMBER IF POSSIBLE AND FOLLOWUP WITH THAT PERSON.

ADDITIONAL INFORMATION IF NECESSARY:

According to Section 490 of the Higher Education Amendments of 1992, completion of the IPEDS surveys is an important part of your institution's Program Participation Agreement (PPA) with the Department of Education and is mandatory for participation in federal student financial assistance programs.

Thank you very much for your time and cooperation.

Exhibit 9. Fall Keyholder/CEO Call Script for No Data Entered

"NO DATA" Script: Keyholder/CEO Calls to Registered
Title IV Institutions with no survey data entered
Fall 2022 Collection

Guidelines and Script

In an effort to get the remaining Title IV schools to enter their IPEDS data, beginning October 5th, we will be making calls to those schools that have not entered any survey data for their required surveys. I have outlined some guidelines to follow when making these calls. Each of you will be getting a list of schools assigned to you in the Help Desk Application (HDA).

Goals of these calls:
1) Get the school to begin data entry as soon as possible and remind them of the deadline for Fall IPEDS submission of October 19th; or
2) Get a good reason for why the school should not be included in IPEDS.

ALL calls must be thoroughly documented in the call log in the HDA.

Guidelines to follow for contacting keyholder and/or CEOs:

- Check Status of the school in the Data Collection System (DCS) to determine if the school is still showing up as not having data entered (i.e. status of "NO DATA") for the Institutional Characteristics (IC), 12-Month Enrollment (E12), and Completions (C) surveys.
    - There is a feature in HDA which automatically takes schools off your list as the schools start entering data, but you should still check the status in the DCS before making the call.
    - If they have begun entering data (i.e. "No Data," "has data," "edited," "clean," "locked," or "complete" as the status of ANY of the surveys) since the time that list was generated they do NOT need to be called (but document this reason in the call log when resolving the incident).

- CHECK HDA COMMENTS THOROUGHLY to see if there is any reason for the school not making progress. If a valid reason is given, you do not need to call them (e.g. we are determining if they are still Title-IV eligible). *However, enter a comment explaining that you reviewed the comments and explaining WHY you are not calling.*

- When you call the school, you will ask to speak FIRST with the keyholder (KH). If the keyholder is no longer employed there, or is unavailable, then you will ask to speak with the CEO.
    - The Keyholder name and phone number can be located in the HDA (contacts screen) or in the collection system (DCS) in the "user" screen,
    - The CEO name and phone number is located in the DCS in the "Institution Identification" screen.

- Be sure to introduce yourself as being from the IPEDS helpdesk and state that you are following up regarding data entry for the IPEDS Fall data collection. An example script is shown below.

- The keyholder or CEO may give you a reason why they do not think they need to participate in IPEDS. There should, however, be VERY few acceptable reasons. If they try to give you such a reason, please keep good notes and CONTACT Project Staff.

- If the KH or CEO says that the data are being combined with another school, or that the school has closed, seek help from supervisor or Project Staff to determine how to handle the specific situation.

- Although you will only be calling schools with Keyholders, you should note that there are also users called "coordinators" and they have a later deadline of November 2nd. If someone tells you that their deadline is November 2nd, seek help from a colleague to determine if the user is actually a coordinator.
  - Keyholder UserIDs start with "P" or "88G." Any _other_ IDs (starting with a 2-digit number) are "coordinator" users.

Example script for contacting Keyholders and CEOs:

First, try to contact the Keyholder:

> Hello, my name is _____, calling on behalf of the U.S. Department of Education concerning the IPEDS Fall Data Collection. May I speak with Dr./Mr./Ms. (Keyholder NAME)?

IF keyholder IS UNAVAILABLE:
> May I leave a message for Dr./Mr./Ms. (NAME), or can you suggest a time at which I should call back? (Or if you have already made 2-3 call attempts:) Is there someone else I can talk to about the IPEDS Fall data collection?
>
> LEAVE A MESSAGE THAT YOU CALLED AND ASK THAT THE Keyholder/CEO CALL THE IPEDS Help Desk (877-225-2568) OR SET AN APPOINTMENT TO CALL BACK.

IF Keyholder is available:
> Hello Dr./Mr./Ms. (KH NAME), I am calling concerning the IPEDS Fall Data Collection. ***Please note that all calls from the Help Desk may be monitored for quality control purposes*** As of today, we see that you have not yet begun entering data. We wanted to make sure you were aware of the October 19th deadline. Is there anything I can help you with to assure that you are able to meet this deadline?
>
> (If "NO"): Please remember that the deadline for the study is October 19th and that participation is mandatory for schools that participate in Title IV student financial aid programs. The IPEDS Help Desk will be open Oct. 10th - Oct. 19th from 8:30am-8pm weekdays, 9:30am-6pm Saturday Oct. 8th & 1:30pm-6pm Sunday Oct. 9th. Thank you very much and have a nice day.
> (If "YES") Answer any questions they may have.

If keyholder is unavailable, try to contact the CEO.
> Hello, my name is _____, calling for the U.S. Department of Education concerning the IPEDS Fall Data Collection. May I speak with Dr./Mr./Ms. (CEO NAME)?

IF CEO IS UNAVAILABLE:
> May I leave a message for Dr./Mr./Ms. (NAME), or can you suggest a time at which I should call back? Or is there someone else I can talk to about the Fall data collection?

LEAVE A MESSAGE THAT YOU CALLED AND ASK THAT THE CEO CALL THE IPEDS HOTLINE (877-225-2568) OR SET AN APPOINTMENT TO CALL BACK.

IF CEO IS AVAILABLE:
> Hello Dr./Mr./Ms. (CEO NAME), I am calling concerning the IPEDS Fall Data Collection. ****Please note that all calls from the Help Desk may be monitored for quality control purposes.****As of today, your school has not yet

begun entering data. We wanted to make sure you are aware of the October 19th deadline. I tried contacting your keyholder, Dr/Mr./Ms. (KH Name), but was unable to reach him/her.

We would very much appreciate your help because the surveys must be completed by October 19th and they are mandatory for schools that participate in Title IV student financial aid programs.

Is there anything I can help you with to assure that you are able to meet the October 19th deadline?

(If "NO"): Then thank you very much for reminding your keyholder, and have a nice day.

(If "YES") Answer any questions they may have.

*** A checkbox has been added in HDA. Once the script has been read, indicating that the call may be monitored for quality control purposes, the box should be checked, and this part of the script does not need to be read during future calls to the school.

IF CEO THINKS SCHOOL IS OUT OF SCOPE FOR IPEDS, OBTAIN REASON AND RECORD DETAILS. Contact Project Staff with this information.

ADDITIONAL INFORMATION IF NECESSARY:

According to Section 490 of the Higher Education Amendments of 1992, completion of the IPEDS surveys is an important part of your institution's Program Participation Agreement (PPA) with the Department of Education and is mandatory for participation in federal student financial assistance programs.

Thank you very much for your time and cooperation.

Exhibit 10. Fall Close -2 Weeks Reminder Email to Keyholder for "No Data Entered" or "All Required Surveys Not Locked"

Subject: IPEDS Reminder – Fall Collection Closes in Two Weeks

October 5, 2022

Dear IPEDS Keyholder:

The Fall 2022 IPEDS data collection is scheduled to close in just two weeks, on October 19th. Currently, our records indicate that you have not yet locked the required surveys that are being conducted this Fall.

All institutions are required to complete the IC Header, Institutional Characteristics (IC), Completions (C), and 12-Month Enrollment (E12) components.

Please remember that you must lock each survey for it to be considered a response. Use the "Am I Done?" feature to confirm that all of your required surveys are locked.

While we understand that you are busy with many other responsibilities, we would strongly encourage you to enter and lock your data as soon as possible. Section 487(a)(17) of the Higher Education Act of 1965, as amended, requires that, as a condition of continued participation in the federal student aid programs, all institutions must complete the IPEDS surveys.

The office of Federal Student Aid has provided the following warning to institutions that did not provide data during recent IPEDS collections: "We want to stress that compliance with these reporting requirements is an important obligation for all schools that participate in the federal student aid programs... An institution's failure to complete and submit these surveys is considered a serious violation of its obligations under the HEA and the regulations."

At this time, the Help Desk is beginning to call the CEOs of Title IV institutions that have not yet begun entering any data. In order to avoid receiving such a call, please begin entering your data as soon as possible. Following today's email reminder, we will send one additional email reminder, on October 12th, to ensure your compliance with the collection deadline date of October 19th, 2022.

The data collection website is located at http://surveys.nces.ed.gov/ipeds. If you have questions concerning accessing the system, or entering, editing, or locking your data, please contact the Help Desk at 1-877-225-2568, or ipedshelp@rti.org. The help desk will operate extended hours starting October 4th and continuing through the end of the collection on October 19th: Weekdays 8:30am to 8:00pm, Saturday (October 8) 9:30am to 6:00pm, and Sunday (October 9) 1:30pm to 6:00pm, all times are Eastern.

Thank you in advance for your assistance in this important project.

Sincerely,

Tara Lawley
Program Director
Integrated Postsecondary Education Data System
National Center for Education Statistics

Exhibit 11. Fall Keyholder Call Script for Institutions with NEW Keyholder and All Required Surveys Not Yet Locked

New Keyholder Script: Keyholder Calls to Registered
Title IV Institutions with a new Keyholder and all surveys not locked
Fall 2022 Collection

Guidelines and Script

In recent years, new keyholders have been most at risk for failing to complete all required surveys by the collection deadline. To better target these less experienced keyholders, we will be contacting them if all required surveys are not locked as of two weeks remaining in the collection.

Note: New keyholders are self-identified by selecting the "New Keyholder" radio button at the time of their registration in the IPEDS collection system.

Beginning October 5th, we will be making calls to new keyholders if they haven't yet locked all surveys. Guidelines for conducting these calls are outlined below. Call assignments will be made within the Help Desk Application (HDA).

Goals of these calls:
- Confirm that the new keyholder is aware of the Fall IPEDS submission of October 19th
- Confirm that the new keyholder is aware of all surveys required during the fall collection;
- Offer assistance, if needed, to assist the keyholder in completing and locking the surveys.

ALL calls must be thoroughly documented in the call log in the HDA.

Guidelines to follow for contacting the keyholder:

- Check Status of the school in the Data Collection System (DCS) to determine if the school is still not yet complete (i.e. status other than "locked" or "complete" for the Institutional Characteristics (IC), 12-Month Enrollment (E12), and Completions (C) surveys).

    - If they have completed entering data (i.e. "locked," or "complete" as the status for ALL of the above surveys) since the time that list was generated they do <u>NOT</u> need to be called, but document this reason in the call log when resolving the incident.

- CHECK HDA COMMENTS THOROUGHLY to see if there is any reason for the school not making progress, or if the Keyholder has already been in contact with the help desk to seek assistance.

- When you call the school, you will ask to speak with the keyholder (KH). If the keyholder is no longer employed there, or is unavailable, then you will ask to speak with the CEO.

    - The Keyholder name and phone number can be located in the HDA (contacts screen) or in the collection system (DCS) on the "user" screen,

- Be sure to introduce yourself as being from the IPEDS helpdesk and state that you are following up regarding data entry for the IPEDS Fall data collection. An example script is included below.

- Although you will only be calling schools with Keyholders, you should note that there are also users called "coordinators" and they have a later deadline of November 2nd. If someone tells you that their deadline is November 2nd, seek help from a colleague to determine if the user is actually a coordinator. Keyholder UserIDs start with "P" or "88G." Any <u>other</u> IDs (starting with a 2-digit number) are "coordinator" users.

Example script for contacting Keyholders:

Hello, my name is _____, calling on behalf of the U.S. Department of Education concerning the IPEDS Fall Data Collection. May I speak with Dr./Mr./Ms. (Keyholder NAME)?

IF keyholder IS UNAVAILABLE:

May I leave a message for Dr./Mr./Ms. (NAME), or can you suggest a time at which I should call back?

LEAVE A MESSAGE THAT YOU CALLED AND ASK THAT THE KEYHOLDER CALL THE IPEDS Help Desk (877-225-2568) OR SET AN APPOINTMENT TO CALL BACK.

IF Keyholder is available:

Hello Dr./Mr./Ms. (KH NAME), I am calling concerning the IPEDS Fall Data Collection. ***Please note that all calls from the Help Desk may be monitored for quality control purposes*** Because you have identified yourself as a new keyholder, we are contacting you as a courtesy to make sure you are aware of the October 19th deadline for submitting Fall data.

Are you aware that your institution has surveys due by October 13th, which includes Institutional Characteristics, Completions, and 12-Month Enrollment?

Are you the individual who will be completing the Fall surveys?

(*If NO*: Have you contacted the individuals responsible for those surveys and provided the blank forms, instructions, and due dates?)

(If YES: Have you located the blank forms and instructions for completing the surveys?)

Is there anything I can help you with to assure that you are able to meet this deadline? (If "YES") Answer any questions they may have.

Please keep the Help Desk phone number handy in case you have questions that we can assist you with. Do you need the phone number?

(If "YES") Provide phone number and email address.

We also wanted to encourage you to complete the surveys as soon as possible. Just to let you know, the Help Desk tends to get very busy toward the end of the collection, especially the last few days, and it is harder to reach us. In order that we can answer any questions that you have, please do not wait until the last minute.

Thank you for your time, and have a nice day.

*** A checkbox has been added in HDA. Once the script has been read, indicating that the call may be monitored for quality control purposes, the box should be checked, and this part of the script does not need to be read during future calls to the school.

Exhibit 12. Fall Close -1 Week Reminder Email to Keyholder for "No Data Entered" or "All Required Surveys are Not Locked"

**Note: The CEO will be copied on this email IF the institution is on the "special call" list having missed a collection deadline during the prior 2 collection years.

Subject: IPEDS Reminder – Fall Collection Closes in One Week

October 12, 2022

Dear IPEDS Keyholder:

As of today, your institution had not completed its required IPEDS Fall 2022 survey components. The IC Header, Institutional Characteristics (IC), Completions (C) and 12-Month Enrollment (E12) components are required for all institutions.

You can access the data collection site at: http://surveys.nces.ed.gov/ipeds. Log into the system and click on the "Am I Done?" link at the top of your institution's survey list to see which surveys you need to complete.

Please do NOT ignore this email but if you feel you have received it in error, call the Help Desk at 1-877-225-2568.

The Fall 2022 data collection will close to keyholders on Wednesday, October 19, 2022, at midnight Pacific Time. You will not be able to submit, edit, or lock data after that date and NO extensions can be granted. Please remember that each survey component must be locked to be considered a response. If you have not locked the required IPEDS survey components by October 19, your institution will be referred to the office of Federal Student Aid for appropriate action.

Section 487(a)(17) of the Higher Education Act of 1965, as amended, requires that, as a condition of continued participation in the federal student aid programs, all institutions must complete the IPEDS surveys. Title IV, HEA program regulations 34 CFR 668.84, 668.85, and 668.86 permit a fine of up to $59,017 for each violation.

If you have questions concerning accessing the system, or entering, editing, or locking your data, please contact the Help Desk at 1-877-225-2568, or ipedshelp@rti.org. The help desk will be operating extended hours through the end of the collection on October 19 as follows: Weekdays 8:30am to 8:00pm, Saturday (October 8) 9:30am to 6:00pm and Sunday (October 9) 1:30pm to 6:00pm, all times are Eastern.

Thank you in advance for your assistance in this important project.

Sincerely,

Ross C. Santy
Associate Commissioner
Administrative Data Division
National Center for Education Statistics

Exhibit 13. Winter/Spring Opening Announcement Email

Subject: IPEDS Winter AND Spring Data Collections Now Open

December 7, 2022

Dear IPEDS Keyholder:

Both the Winter 2022-23 and Spring 2023 web-based data collections are now open. The Winter collection will remain open through February 8, 2023, and the Spring collection will remain open through April 5, 2023.

You can access the collection site at: http://surveys.nces.ed.gov/IPEDS

IMPORTANT NOTE: When you log in, you will need to choose a new password, because your current password has expired.

For the Winter collection:
-   All institutions MUST complete the Student Financial Aid (SFA) component and most institutions must complete the Graduation Rates (GR), Graduation Rates 200 (GR200), Admissions (ADM) and Outcome Measures (OM) components. These survey components must be completed by February 8, 2023.

For the Spring collection:
-   All institutions MUST complete the Human Resources (HR), Finance (F), Fall Enrollment (EF), and Academic Libraries (AL) components by April 5, 2023.

Please make a note of the reporting deadlines for these survey components. You will not be able to submit, edit, or lock data after those dates and NO extensions can be granted.

The following assistance is available to you as you prepare your institution's data submissions:

•   The IPEDS Help Desk is available to assist you at any time during the collection cycle. Please contact the Help Desk at 1-877-225-2568 or ipedshelp@rti.org if you have any questions about the IPEDS system.

•   Copies of the survey forms, instructions, file upload specifications, and frequently asked questions are available in the collection system under the Help menu.

•   The Association for Institutional Research (AIR) has free IPEDS online tutorials available at https://nces.ed.gov/ipeds/join-in/training-and-outreach, click on AIR's Online Video Tutorials. Select Online Tutorials from the left menu to access overviews and key reporting concepts and tips for completing IPEDS surveys.

Remember that the completion of all IPEDS surveys, in a timely and accurate manner, is mandatory for all institutions that participate or are applicants for participation in any Federal financial assistance program authorized by Title IV of the Higher Education Act (HEA) of 1965, as amended. IPEDS surveys are mandated by 20 U.S.C. 1094(a)(17). Institutions have been fined for failing to submit complete surveys on time.

To assist you in meeting this requirement, NCES has established a rigorous follow-up schedule. PLEASE DO NOT IGNORE EMAIL CORRESPONDENCE. You will be prompted ONLY IF YOUR SURVEY SUBMISSION IS NOT COMPLETE.

In order to complete all requirements for data submission, keyholders must LOCK each survey.
-   Under "Steps to Locking," be sure to run "Perform Edits" and resolve any errors.
-   When activated (underlined), click "Lock" and follow the instructions.

- Please be sure to check your Survey status to make sure that it reads Locked or Complete after you have locked your data.
- Use the "Am I Done" feature to ensure that you have completed all required surveys.

NCES will send an email acknowledgement to the Chief Executive Officer (CEO) of those institutions that lock all of their required survey components prior to the final three weeks of the collection. Although we realize that it is not always possible for the IPEDS data to be submitted this early, we do appreciate the efforts of those individuals who can, and do, complete their data entry early in the collection. As such, we want to recognize the efforts of those individuals. If your institution changes keyholders at any time during the year, be sure to change the contact information on the registration screen, which can be found under "Tools."

You can correct or update any data that were submitted during last year's collection using the IPEDS Prior Year Data Revision system at http://surveys.nces.ed.gov/ipeds_py/. Survey components will be open for revision during their regular data collection period. For example, revisions to the Completions component can be made during the Fall data collection period. Use your current UserID and password for access.

Finally, please note that Keyholders may "opt-out" of receiving some of the scheduled IPEDS reminders during the collection. To participate in the "opt-out" opportunity, login to the collection system, go to the Tools menu and select "Follow-up Opt Out". After reading the instructions, choose the radio button as appropriate. This action must be repeated for EACH collection period, if you choose to continue opting-out. Note that new Keyholders cannot opt-out, and all IPEDS compliance requirements still apply (e.g. institutions will not be granted extensions for failure to meet the reporting deadline).

Best regards,

Tara Lawley
Program Director
Integrated Postsecondary Education Data System
National Center for Education Statistics

Exhibit 14. Winter Registration Close -4 Weeks Reminder Letter to CEOs

<NCES Letterhead>

January 11, 2023

<mark>ceo_name</mark>
<mark>ceo_title</mark>
<mark>institution_name</mark>
<mark>addr1_txt</mark>
<mark>city_txt</mark>, <mark>state_cd</mark> <mark>zip_text</mark>

Dear Chief Executive Officer:

Your institution currently does not have a designated keyholder for the 2022-23 collection cycle. *So that your institution does not miss any additional reporting deadlines*, it is essential that you appoint one at this time, and forward the enclosed materials to that individual. The success of the IPEDS data collection and quality of the IPEDS data depend, in large part, on the efforts of your institution's keyholder.

The keyholder is responsible for your institution's data submission and should be someone who is familiar with the IPEDS data collection. This person is responsible for all three collections— Fall 2022, Winter 2022-23, and Spring 2023. The enclosed materials provide the information your appointed keyholder will need to register prior to entering data into the system. Once your keyholder registers, all future correspondence will go directly to him or her.

The importance of your institution's compliance with this reporting responsibility cannot be overstated. Please be aware that responses to the IPEDS surveys are mandated for those institutions that participate or expect to participate in Title IV federal financial aid programs under Section 487(a)(17) of the Higher Education Act of 1965, as amended (HEA), 20 U.S.C. §1094(a)(17) and the Department of Education's regulations at 34 C.F.R. §668.14(b)(19). As a condition of continued participation in the federal student aid programs, all institutions must complete, in a timely manner and to the satisfaction of the Secretary, all surveys conducted as a part of the Integrated Postsecondary Education Data System. According to the Office of Federal Student Aid (FSA), an institution's failure to complete and submit these surveys is a serious violation of its obligations under the HEA and the regulations, and appropriate action will be taken by FSA. Title IV, HEA program regulations 34 CFR 668.84, 668.85, and 668.86 permit a fine of up to $59,017 for each violation.

The data collection periods for the 2022-23 IPEDS collection year are scheduled as follows:

Fall 2022:	September 7, 2022 – October 19, 2022
Winter 2022-23:	December 7, 2022 – February 8, 2023
Spring 2023:	December 7, 2022 – April 5, 2023

The results of the 2021-22 Integrated Postsecondary Education Data System (IPEDS) web-based data collections are currently available through the IPEDS Use the Data tools and the College Navigator website. Links to all of these data tools are on the IPEDS web site at http://nces.ed.gov/ipeds.

There is no need for you to respond to this letter. However, if you need any additional information or have any questions, please contact the IPEDS Help Desk toll free at 1-877-225-2568 (or send an email to ipedshelp@rti.org). Thank you in advance for your assistance in this important project.

Sincerely,

Ross C. Santy
Associate Commissioner
Administrative Data Division
National Center for Education Statistics

Attachments
<mark>unitid</mark>
Exhibit 15. Winter Close -4 Weeks Reminder Email to Keyholders

Subject: IPEDS Reminder – Winter Collection Closes in Four Weeks

January 11, 2023

Dear IPEDS Keyholder:

There are four weeks remaining in the Winter 2022-23 IPEDS data collection, and we are scheduled to close promptly on February 8, 2023. Currently, our records indicate that you have not begun to enter information for the survey components which are required of your institution. All institutions are required to complete the Student Financial Aid (SFA) survey component, while most institutions are also required to complete the Graduation Rates (GR) Graduation Rates 200 (GR200), Admissions (ADM) and Outcome Measures (OM) components. You will not be able to submit, edit, or lock data after the due date and NO extensions can be granted.

While we understand that you are busy with many other responsibilities, we would strongly encourage you to enter and lock your data as soon as possible. As you know, under Section 487(a)(17) of the Higher Education Act of 1965, as amended, completion of the IPEDS surveys is an integral part of your institution's Program Participation Agreement (PPA) with the Department of Education.

We will be sending additional email reminders on January 25th and February 1st. Also on January 25th, we will begin calling the CEOs of institutions where keyholders have not begun entering data.

The IPEDS web-based collection system is located at: http://surveys.nces.ed.gov/ipeds. If you have questions concerning accessing the system, or entering, editing, or locking your data, please contact the Help Desk at 1-877-225-2568, or ipedshelp@rti.org.

Please do not disregard this email! If you believe that you have received this message in error, please contact the Help Desk. Thank you in advance for your assistance in this important project.

Best regards,

Tara Lawley
Program Director
Postsecondary Institutional Studies Program
National Center for Education Statistics

Exhibit 16. Winter Close -4 Weeks Reminder Email to NEW Keyholders
Subject: IPEDS Reminder – Winter Collection Closes in Four Weeks

January 11, 2023

Dear IPEDS Keyholder:

Although there are four weeks remaining in the Winter 2022-23 IPEDS data collection, please be aware that we are scheduled to close promptly on February 8, 2023. Currently, our records indicate that you have not completed and locked all surveys that are required of your institution for this Winter collection. All institutions are required to complete the Student Financial Aid (SFA), Graduation Rates (GR), Graduation Rates 200 (GR200), Admissions (ADM) and Outcome Measures (OM) survey components, if applicable to the institution.

When you registered in the IPEDS Data Collection System (DCS), you identified yourself as a new keyholder. As such, we wanted to be sure to highlight a few things:

- If you have not yet located and reviewed the blank forms and instructions for completing the survey components, please do so as soon as possible. Contact the IPEDS Help Desk if you need assistance with finding the correct forms.

- If you are not the individual who will be completing the Winter surveys, please contact the individuals responsible for those surveys and provide them with the blank forms, instructions, and due date. Also, consider generating and assigning "proxy UserIDs" so that these individuals can access the DCS directly.

- While we understand that you are busy with many other responsibilities, we would strongly encourage you to enter and lock your data as soon as possible. Just to let you know, the Help Desk tends to get very busy toward the end of the collection, especially the last few days, and it is harder to reach them. In order that they can answer any questions that you have, please do not wait until the last minute.

As you know, under Section 487(a)(17) of the Higher Education Act of 1965, as amended, completion of the IPEDS surveys is an integral part of your institution's Program Participation Agreement (PPA) with the Department of Education.

We will be sending additional email reminders on January 25th and February 1st. Also on January 25th, we will begin calling the CEOs of institutions where keyholders have not begun entering data.

The IPEDS web-based collection system is located at: http://surveys.nces.ed.gov/ipeds and if you have questions concerning accessing the system, or entering, editing, or locking your data, please contact the Help Desk at 1-877-225-2568, or ipedshelp@rti.org.

Please do not disregard this email! If you believe that you have received this message in error, please contact the Help Desk. Thank you in advance for your assistance in this important project.

Best regards,

Tara Lawley
Program Director
Integrated Postsecondary Education Data System
National Center for Education Statistics

Exhibit 17. Winter CEO Close -3 Weeks Early-Completer Thank-You Email
Subject: IPEDS Thanks You for Early Response - <mark><UnitID></mark>

January 18, 2023

Dear Chief Executive:

The National Center of Education Statistics, part of the U.S. Department of Education, would like to extend its appreciation to your institution, and especially to your IPEDS Keyholder, <<mark>keyholder name</mark>>. As of today (three weeks prior to the close of the Winter data collection), the required IPEDS survey components for your institution, <<mark>institution name</mark>>, have been entered, edited, and locked.

Because IPEDS is a very large data collection involving a large number of institutions, completing the surveys and locking them early during the collection period is extremely helpful. Providing IPEDS data is a major undertaking, and we want you to know that we truly appreciate the timely response. We hope that you will pass along our word of gratitude to your Keyholder, as he or she is the one who is typically charged with overseeing the successful data entry and completion of the mandatory IPEDS surveys.

Again, please accept our thanks to you and your staff for your important contributions to the success of IPEDS.

Sincerely,

Tara Lawley
Program Director
Integrated Postsecondary Education Data System
National Center for Education Statistics

<mark>CC: Keyholder</mark>

Exhibit 18. Winter CEO Call Script for No Registered Keyholder

CEO Calls to Title IV Institutions - No Registered Keyholder
Guidelines and Script
Winter 2022-23

In an effort to get the remaining Title IV schools to register for IPEDS, beginning on January 18th, we will be making calls to those schools who have not registered. We have outlined some guidelines to follow when making these calls. Each of you will be getting a list of schools to work sorted by sector.

Goals of these calls:
1) Get the school to register for IPEDS as soon as possible and remind them of the deadline for IPEDS submission of February 8th or
2) Get a good reason for why the school should not be included in IPEDS

List of Sectors:
(0)   Central Office Administrative Unit
(1)   4-year public
(2)   4-year private, not-for-profit
(3)   4-year private, for-profit
(4)   2-year public
(5)   2-year private, not-for-profit
(6)   2-year private, for-profit
(7)   Less than 2-year public
(8)   Less than 2- year private, not-for-profit
(9)   Less than 2-year private, for-profit
(99)   New Institution

Guidelines to follow for contacting CEOs:

- Check Status of the school to see if it is still showing up as not registered. If they have registered since the list was generated, you do not need to call, but be sure to document why the call was NOT made.
- CHECK COMMENTS THOROUGHLY to see if there is any reason for the school not being registered. If a reason is given, you may not need to call them. For example, if they called us and said that they are no longer Title-IV, and the incident is pending review by project staff, you do not need to make the call.
- When you call the school, you will first ask to speak with the CEO (get his/her name from the Institution Identification page). If you cannot reach the CEO, please leave him/her a message but ALSO try to reach the Keyholder from last year (if there was one). Be sure to introduce yourself as being from the IPEDS help desk and state that you are following up regarding registration for the IPEDS data collection. An example script is shown below.
- In rare cases, the CEO may give you a reason why they do not think they need to register or participate in IPEDS. Keep good notes and document them in the Help Desk Application (HDA) thoroughly, then contact a project staff person.
- *You MAY also get some schools that submit combined data.* All schools need to submit their own IC, but other surveys can be combined, in specific situations. If the school is part of a parent-child relationship, but does not appear that way in the system, get the details of the arrangement so that we can set them up properly in the system.

Example script for contacting CEOs:
Hello, my name is _____, calling on behalf of the U.S. Department of Education concerning the IPEDS Winter Data Collection. May I speak with Dr./Mr./Ms. (CEO NAME)?

IF CEO IS UNAVAILABLE:
May I leave a message for Dr./Mr./Ms. (CEO NAME), or can you suggest a time at which I should call back?

LEAVE A MESSAGE THAT YOU CALLED AND ASK THAT THE CEO CALL THE IPEDS HOTLINE (877-225-2568) OR SET APPOINTMENT TO CALL BACK.

IF CEO IS AVAILABLE:
Hello Dr./Mr./Ms. (CEO NAME), I am calling concerning the IPEDS Winter Data Collection. In August and September, we sent letters to you requesting that you appoint a keyholder for IPEDS (Integrated Postsecondary Education Data System). Your keyholder has not registered for the current data collection year, which opened in September. [IF there is an unregistered keyholder in the system, tell the CEO who that person is. If not, ask:] Have you appointed a keyholder?

IF YES:
　　　We need for the keyholder to register and begin data collection immediately in order to meet the February 8th8th deadline for the Winter data collection. Would you be able to follow-up with the keyholder? Or if you prefer, you can give me the name and phone number of the keyholder and I will be happy to call them.

IF NO:
　　　We need for you to appoint a keyholder immediately so they can register and begin data collection. The deadline for the collection is February 8th. If you could give me the name and phone number of that person now, I will be happy to call them and provide them with the ID and password necessary for them to register and begin data collection.

　　　OBTAIN KEYHOLDER NAME AND PHONE NUMBER IF POSSIBLE AND FOLLOWUP WITH THAT PERSON.

ADDITIONAL INFORMATION IF NECESSARY:

According to Section 490 of the Higher Education Amendments of 1992, completion of the IPEDS surveys is an important part of your institution's Program Participation Agreement (PPA) with the Department of Education and is mandatory for participation in federal student financial assistance programs.

Thank you very much for your time and cooperation.

Exhibit 19. Winter Keyholder/CEO Call Script for No Data Entered

<div align="center">

"NO DATA" Script: Keyholder/CEO Calls to Registered
Title IV Institutions with no survey data entered
Winter 2022-23 Collection

Guidelines and Script

</div>

In an effort to get the remaining Title IV schools to enter their IPEDS data, beginning January 25th, we will be making calls to those schools that have not entered any survey data for their required surveys. Outlined below are guidelines to follow when making these calls. Each of you will be getting a list of schools assigned to you in the Help Desk Application (HDA).

Goals of these calls:
1) Get the school to begin data entry as soon as possible and remind them of the deadline for Winter IPEDS submission of February 8th; or
2) Get a good reason for why the school should not be included in IPEDS.

ALL calls must be thoroughly documented in the call log in the HDA.

Guidelines to follow for contacting keyholder and/or CEOs:

- Institutions will be assigned in the HDA, thus any institution showing up in the call list currently has not begun entering data for their SFA, GR, GR200, ADM or OM surveys (i.e. status of "NO DATA" or "No-Data"). Schools will automatically be removed from the list once they have started entering SFA, GR, GR200, ADM and/or OM data. These reminder calls apply ONLY to schools that have not started the Winter surveys. For the purpose of these calls, we do NOT consider the status of any other surveys, thus you may be told that the institution HAS started, but in those cases they have likely started on the HR, EF, F, and/or AL surveys, but NOT the SFA, GR, GR200, ADM or OM surveys.

- CHECK HDA COMMENTS THOROUGHLY to see if there is any reason for the school not making progress. If a valid reason is given, you do not need to call them (e.g. we are determining if they are still Title-IV eligible). *However, enter a comment explaining that you reviewed the comments and explaining WHY you are not calling*.

- When you call the school, you will ask to speak FIRST with the keyholder (KH). If the keyholder is no longer employed there, or is unavailable, then you will ask to speak with the CEO.
    - The Keyholder name and phone number can be located in the HDA (contacts screen) or in the collection system (DCS) on the "user" screen,
    - The CEO name and phone number is located in the DCS in the "Institution Identification" screen.

- Be sure to introduce yourself as being from the IPEDS helpdesk and state that you are following up regarding data entry for the IPEDS Winter data collection. An example script is shown below.

- The keyholder or CEO may give you a reason why they do not think they need to participate in IPEDS. There should, however, be VERY few acceptable reasons. If they try to give you such a reason, please keep good notes and CONTACT Project Staff.

- If the KH or CEO says that the data are being combined with another school, or that the school has closed, seek help from a Supervisor or Project Staff to determine how to handle the specific situation.
    - Although you will only be calling schools with Keyholders, you should note that there are also users called "coordinators" and they have a later deadline of February 22nd. If someone tells you that their deadline is February 22nd, seek help from a colleague to determine if the user is actually a coordinator

Keyholder UserIDs start with "P" or "88G." Any *other* IDs (starting with a 2-digit number) are "coordinator" users.

Example script for contacting Keyholders and CEOs:

First, try to contact the Keyholder:

Hello, my name is _____, calling on behalf of the U.S. Department of Education concerning the IPEDS Winter Data Collection. May I speak with Dr./Mr./Ms. (Keyholder NAME)?

IF keyholder IS UNAVAILABLE:
May I leave a message for Dr./Mr./Ms. (NAME), or can you suggest a time at which I should call back? (Or if you have already made 2-3 call attempts:) Is there someone else I can talk to about the IPEDS Winter data collection?

LEAVE A MESSAGE THAT YOU CALLED AND ASK THAT THE Keyholder/CEO CALL THE IPEDS Help Desk (877-225-2568) OR SET AN APPOINTMENT TO CALL BACK.

IF Keyholder is available:
Hello Dr./Mr./Ms. (KH NAME), I am calling concerning the IPEDS Winter Data Collection. As of today, we see that you have not yet begun entering data for the required Winter surveys. We wanted to make sure you were aware of the February 8th deadline. Is there anything I can help you with to assure that you are able to meet this deadline?
(If "NO"): Please remember that the deadline for entering your data is February 8th and that participation is mandatory for schools that participate in Title IV student financial aid programs. Thank you very much and have a nice day.
(If "YES") Answer any questions they may have.

If keyholder is unavailable, try to contact the CEO.
Hello, my name is _____, calling for the U.S. Department of Education concerning the IPEDS Winter Data Collection. May I speak with Dr./Mr./Ms. (CEO NAME)?

IF CEO IS UNAVAILABLE:
May I leave a message for Dr./Mr./Ms. (NAME), or can you suggest a time at which I should call back? Or is there someone else I can talk to about the Winter data collection?

LEAVE A MESSAGE THAT YOU CALLED AND ASK THAT THE CEO CALL THE IPEDS Help Desk (877-225-2568) OR SET AN APPOINTMENT TO CALL BACK.

IF CEO IS AVAILABLE:
Hello Dr./Mr./Ms. (CEO NAME), I am calling concerning the IPEDS Winter Data Collection. As of today, your school has not yet begun entering data for the required surveys. We wanted to make sure you are aware of the February 8th deadline. I tried contacting your keyholder, Dr/Mr./Ms. (KH Name), but was unable to reach him/her.
We would very much appreciate your help because the Winter surveys must be completed by February 8th and is mandatory for schools that participate in Title IV student financial aid programs.
Is there anything I can help you with to assure that you are able to meet the February 8th deadline?
(If "NO"): Then thank you very much for reminding your keyholder, and have a nice day.
(If "YES") Answer any questions they may have.

IF CEO THINKS SCHOOL IS OUT OF SCOPE FOR IPEDS, OBTAIN REASON AND RECORD DETAILS. Contact Project Staff with this information.

ADDITIONAL INFORMATION IF NECESSARY:

According to Section 490 of the Higher Education Amendments of 1992, completion of the IPEDS surveys is an important part of your institution's Program Participation Agreement (PPA) with the Department of Education and is mandatory for participation in federal student financial assistance programs.

Thank you very much for your time and cooperation.

Exhibit 20. Winter Close -2 Weeks Reminder Email to Keyholder for "No Data Entered" or "All Required Surveys Not Locked"

Subject: IPEDS Reminder – Winter Collection Closes in Two Weeks

January 25, 2023

Dear IPEDS Keyholder:

The Winter 2022-23 IPEDS data collection is scheduled to close to Keyholders in just two weeks, on February 8th. Currently, our records indicate that you have not yet locked the required surveys that are being conducted during the Winter collection. You will not be able to submit, edit, or lock data after the due date and NO extensions can be granted.

All institutions MUST complete the Student Financial Aid (SFA) component and most institutions must complete the Graduation Rates (GR), Graduation Rates 200 (GR200), Admissions (ADM) and Outcome Measures (OM) components. These survey components must be completed by February 8, 2023. Although the Human Resources (HR), Finance (F), Fall Enrollment (EF), and Academic Libraries (AL) components are currently available, they are not required to be locked until Spring.

Please remember that you must lock each survey for it to be considered a response. Use the "Am I Done?" feature to confirm that your required surveys are locked.

While we understand that you are busy with many other responsibilities, we would strongly encourage you to enter and lock your data as soon as possible. Section 487(a)(17) of the Higher Education Act of 1965, as amended, requires that, as a condition of continued participation in the federal student aid programs, all institutions must complete the IPEDS surveys.

The office of Federal Student Aid has provided the following warning to institutions that did not provide data during recent IPEDS collections: "We want to stress that compliance with these reporting requirements is an important obligation for all schools that participate in the federal student aid programs... An institution's failure to complete and submit these surveys is considered a serious violation of its obligations under the HEA and the regulations."

At this time, the Help Desk is beginning to call the CEOs of Title IV institutions that have not yet begun entering any data for the SFA, GR, GR200, ADM and OM survey components. In order to avoid receiving such a call, please begin entering your data as soon as possible. Following today's email reminder, we will send one additional email reminder, on February 1st, to ensure your compliance with the collection deadline date of February 8th8th.

The data collection website is located at http://surveys.nces.ed.gov/ipeds. If you have questions concerning accessing the system, or entering, editing, or locking your data, please contact the Help Desk at 1-877-225-2568, or ipedshelp@rti.org. The help desk will operate extended hours starting January 30th and continuing through the end of the collection on February 8th as follows: Weekdays 8:30am to 8:00pm, Saturday (February 5) 9:30am to 6:00pm, and Sunday (February 6) 1:30pm to 6:00pm (all times are Eastern).

Thank you in advance for your assistance in this important project.

Sincerely,

Tara Lawley
Program Director
Integrated Postsecondary Education Data System
National Center for Education Statistics

Exhibit 21. Winter Keyholder Call Script for Institutions with NEW Keyholder and All Required Surveys Not Yet Locked

New Keyholder Script: Keyholder Calls to Registered
Title IV Institutions with a new Keyholder and all surveys not locked
Winter 2022-23 Collection

In recent years, new* keyholders have been most at risk for failing to complete all required surveys by the collection deadline. To better target these less experienced keyholders, we will be contacting them if all required surveys are not locked as of two weeks remaining in the collection.

*New keyholders are self-identified by selecting the "New Keyholder" radio button at the time of their registration in the IPEDS collection system.

Beginning January 25th, we will be making calls to new keyholders if they haven't yet locked all surveys. Guidelines for conducting these calls are outlined below. Call assignments will be made within the Help Desk Application (HDA).

Goals of these calls:
- Confirm that the new keyholder is aware of the Winter IPEDS submission of February 8th8th;
- Confirm that the new keyholder is aware of all surveys required during the Winter collection;
- Offer assistance, if needed, to assist the keyholder in completing and locking the surveys.

ALL calls must be thoroughly documented in the call log in the HDA.

Guidelines to follow for contacting the keyholder:

- Check Status of the school in the Data Collection System (DCS) to determine if the school is still not yet complete (i.e. status other than "locked" or "complete" for the Student Financial Aid (SFA), Graduation Rates (GR), Graduation Rates 200 (GR200), Admissions (ADM) and Outcome Measures (OM).

  - If they have completed entering data (i.e. "locked," or "complete" as the status for ALL of the above surveys) since the time that list was generated they do NOT need to be called, but document this reason in the call log when resolving the incident.

- CHECK HDA COMMENTS THOROUGHLY to see if there is any reason for the school not making progress, or if the Keyholder has already been in contact with the help desk to seek assistance.

- When you call the school, you will ask to speak with the keyholder (KH). If the keyholder is no longer employed there, or is unavailable, then you will ask to speak with the CEO.

  - The Keyholder name and phone number can be located in the HDA (contacts screen) or in the collection system (DCS) in the "user" screen,

- Be sure to introduce yourself as being from the IPEDS helpdesk and state that you are following up regarding data entry for the IPEDS Winter data collection. An example script is included below.

- Although you will only be calling schools with Keyholders, you should note that there are also users called "coordinators" and they have a later deadline of February 22nd. If someone tells you that their deadline is February 22nd, seek help from a colleague to determine if the user is actually a coordinator. Keyholder UserIDs start with "P" or "88G." Any *other* IDs (starting with a 2-digit number) are "coordinator" users.

Example script for contacting Keyholders:

Hello, my name is _____, calling on behalf of the U.S. Department of Education concerning the IPEDS Winter Data Collection. May I speak with Dr./Mr./Ms. (Keyholder NAME)?

IF keyholder IS UNAVAILABLE:
May I leave a message for Dr./Mr./Ms. (NAME), or can you suggest a time at which I should call back?

LEAVE A MESSAGE THAT YOU CALLED AND ASK THAT THE Keyholder CALL THE IPEDS Help Desk (877-225-2568) OR SET AN APPOINTMENT TO CALL BACK.

IF Keyholder is available:

Hello Dr./Mr./Ms. (KH NAME), I am calling concerning the IPEDS Winter Data Collection. ***Please note that all calls from the Help Desk may be monitored for quality control purposes*** Because you have identified yourself as a new keyholder, we are contacting you as a courtesy to make sure you are aware of the February 8th deadline for submitting Winter data.

Are you aware that your institution's Student Financial Aid, Graduation Rates, Graduation Rates 200, Admissions and Outcome Measures surveys must be completed by February 8th?

Are you the individual who will be completing the surveys?

> (*If NO*: Have you contacted the individuals responsible for the surveys and provided the blank forms, instructions, and due dates?)

> (If YES: Have you located the blank forms and instructions for completing the surveys?)

Is there anything I can help you with to assure that you are able to meet this deadline? (If "YES") Answer any questions they may have.

Please keep the Help Desk phone number handy in case you have questions that we can assist you with. Do you need the phone number?

> (If "YES") Provide phone number and email address: 1-877-225-2568, ipedshelp@rti.org

We also wanted to encourage you to complete the survey as soon as possible. Just to let you know, the Help Desk tends to get very busy toward the end of the collection, especially the last few days, and it is harder to reach us. In order that we can answer any questions that you have, please do not wait until the last minute.

Thank you for your time, and have a nice day.

*** A checkbox has been added in HDA. Once the script has been read, indicating that the call may be monitored for quality control purposes, the box should be checked, and this part of the script does not need to be read during future calls to the school.

Exhibit 22. Winter Close -1 Week Reminder Email to Keyholder for "No Data Entered" or "All Required Surveys Not Locked"

**Note: The CEO will be copied on this email IF the institution is on the "special call" list having missed a collection deadline during the prior 2 collection years.

Subject: IPEDS Reminder – Winter Collection Closes in One Week

February 1, 2023

Dear IPEDS Keyholder:

The Winter 2022-23 IPEDS data collection will close in one week, on February 8, 2023. As of today, your institution has not completed all of the surveys that are required this Winter.

Please do NOT ignore this email but if you feel you have received it in error, call the Help Desk at 1-877-225-2568.

Once the collection closes to keyholders on Wednesday, February 8, 2023, at midnight Pacific Time, you will not be able to submit, edit, or lock data and NO extensions can be granted. Please remember that each survey component must be locked to be considered a response.

If you have not locked the required IPEDS survey components by February 8, your institution will be referred to the office of Federal Student Aid for appropriate action. Section 487(a)(17) of the Higher Education Act of 1965, as amended, requires that, as a condition of continued participation in the federal student aid programs, all institutions must complete the IPEDS surveys. Title IV, HEA program regulations 34 CFR 668.84, 668.85, and 668.86 permit a fine of up to $59,017 for each violation.

The data collection website is located at: http://surveys.nces.ed.gov/ipeds. If you have questions concerning accessing the system, or entering, editing, or locking your data, please contact the Help Desk at 1-877-225-2568, or ipedshelp@rti.org. The help desk will be operating extended hours through the end of the collection on February 8 as follows: Weekdays 8:30am to 8:00pm, Saturday (February 4) 9:30am to 6:00pm and Sunday (February 5) 1:30pm to 6:00pm (all times are Eastern).

Thank you in advance for your assistance in this important project.

Sincerely,

Ross C. Santy
Associate Commissioner
Administrative Data Division
National Center for Education Statistics

Exhibit 23. Spring Reminder to Include in This Week in IPEDS

**The following note will be included in regularly-scheduled "This Week in IPEDS" announcements during the Spring collection period, at approximately "Close -8" weeks and "Close -6" weeks.

Spring 2023 Data Collection Deadline Reminder

As a reminder to those institutions that did not complete them prior to the Winter collection deadline, the following survey components (if applicable) remain open, with the Keyholder deadline of April 5, 2023: Human Resources (HR), Fall Enrollment (EF), Finance (F), and Academic Libraries (AL).

Exhibit 24. Spring Close -4 Weeks Registration Reminder Letter to CEOs

<NCES Letterhead>

March 8, 2023

ceo_name
ceo_title
institution_name
addr1_txt
city_txt, state_cd zip_text

Dear Chief Executive Officer:

Your institution currently does not have a designated keyholder for the 2022-23 collection cycle. *So that your institution does not miss any additional reporting deadlines*, it is essential that you appoint one at this time, and forward the enclosed materials to that individual. The success of the IPEDS data collection and quality of the IPEDS data depend, in large part, on the efforts of your institution's keyholder.

The keyholder is responsible for your institution's data submission and should be someone who is familiar with the IPEDS data collection. This person is responsible for all three collections— Fall 2022, Winter 2022-23, and Spring 2023. The enclosed materials provide the information your appointed keyholder will need to register prior to entering data into the system. Once your keyholder registers, all future correspondence will go directly to him or her.

The importance of your institution's compliance with this reporting responsibility cannot be overstated. Please be aware that responses to the IPEDS surveys are mandated for those institutions that participate or expect to participate in Title IV federal financial aid programs under Section 487(a)(17) of the Higher Education Act of 1965, as amended (HEA), 20 U.S.C. §1094(a)(17) and the Department of Education's regulations at 34 C.F.R. §668.14(b)(19). As a condition of continued participation in the federal student aid programs, all institutions must complete, in a timely manner and to the satisfaction of the Secretary, all surveys conducted as a part of the Integrated Postsecondary Education Data System. According to the Office of Federal Student Aid (FSA), an institution's failure to complete and submit these surveys is a serious violation of its obligations under the HEA and the regulations, and appropriate action will be taken by FSA.

The data collection periods for the 2022-23 IPEDS collection year are scheduled as follows:

Fall 2022:	September 7, 2022 – October 19, 2022
Winter 2022-23:	December 7, 2022 – February 8, 2023
Spring 2023:	December 7, 2022 – April 5, 2023

There is no need for you to respond to this letter. However, if you need any additional information or have any questions, please contact the IPEDS Help Desk toll free at 1-877-225-2568 (or send an email to ipedshelp@rti.org). Thank you in advance for your assistance in this important project.

Sincerely,

Ross C. Santy
Associate Commissioner
Administrative Data Division
National Center for Education Statistics

Attachments
<mark>unitid</mark>

Exhibit 25. Spring Close -4 Weeks Reminder Email to Keyholders for "No Data Entered"

Subject: IPEDS Reminder – Spring Collection Closes in Four Weeks

March 8, 2023

Dear IPEDS Keyholder:

There are four weeks remaining in the Spring 2023 IPEDS data collection, and we are scheduled to close to Keyholders promptly on April 5, 2023. Currently, our records indicate that you have not begun to enter information for the survey components which are required of your institution. All institutions are required to complete the Human Resources (HR), Fall Enrollment (EF), and Finance (F) components; most institutions are required to complete the Academic Libraries (AL) component as well.

While we understand that you are busy with many other responsibilities, we would strongly encourage you to enter and lock your data as soon as possible. As you know, under Section 487(a)(17) of the Higher Education Act of 1965, as amended, completion of the IPEDS surveys is an integral part of your institution's Program Participation Agreement (PPA) with the Department of Education.

We will be sending additional email reminders on March 22nd and March 29th. Also on March 22nd, we will begin calling the CEOs of institutions where keyholders have not begun entering data.

The IPEDS web-based collection system is located at: http://surveys.nces.ed.gov/ipeds. If you have questions concerning accessing the system, or entering, editing, or locking your data, please contact the Help Desk at 1-877-225-2568, or ipedshelp@rti.org.

Please do not disregard this email! If you believe that you have received this message in error, please contact the Help Desk. Thank you in advance for your assistance in this important project.

Best regards,

Tara Lawley
Program Director
Integrated Postsecondary Education Data System
National Center for Education Statistics

Exhibit 26. Spring Close -4 Weeks Reminder Email to NEW Keyholders
Subject: IPEDS Reminder – Spring Collection Closes in Four Weeks

March 8, 2023

Dear IPEDS Keyholder:

Although there are four weeks remaining in the Spring 2023 IPEDS data collection, please be aware that we are scheduled to close to Keyholders promptly on April 5, 2023. Currently, our records indicate that you have not completed and locked all surveys that are required of your institution for this Spring collection. All institutions are required to complete the Human Resources, Fall Enrollment, and Finance survey components; most institutions are required to complete the Academic Libraries component as well.

When you registered in the IPEDS Data Collection System (DCS), you identified yourself as a new keyholder. As such, we wanted to be sure to highlight a few things:

- If you have not yet located and reviewed the blank forms and instructions for completing the surveys, please do so as soon as possible. Contact the IPEDS Help Desk if you need assistance with finding the correct forms.

- If you are not the individual who will be completing the Spring surveys, please contact the individuals responsible for those surveys and provide them with the blank forms, instructions, and due date. Also, consider generating and assigning "proxy UserIDs" so that these individuals can access the DCS directly.

- While we understand that you are busy with many other responsibilities, we would strongly encourage you to enter and lock your data as soon as possible. Just to let you know, the Help Desk tends to get very busy toward the end of the collection, especially the last few days, and it is harder to reach them. In order that they can answer any questions that you have, please do not wait until the last minute.

As you know, under Section 487(a)(17) of the Higher Education Act of 1965, as amended, completion of the IPEDS surveys is an integral part of your institution's Program Participation Agreement (PPA) with the Department of Education.

We will be sending additional email reminders on March 22nd and March 29th. Also on March 22nd, we will begin calling the CEOs of institutions where keyholders have not begun entering data.

The IPEDS web-based collection system is located at: http://surveys.nces.ed.gov/ipeds and if you have questions concerning accessing the system, or entering, editing, or locking your data, please contact the Help Desk at 1-877-225-2568, or ipedshelp@rti.org.

Please do not disregard this email! If you believe that you have received this message in error, please contact the Help Desk. Thank you in advance for your assistance in this important project.

Best regards,

Tara Lawley
Program Director
Integrated Postsecondary Education Data System
National Center for Education Statistics

Exhibit 27. Spring CEO Close -3 Weeks Early-Completer Thank-You Email
Subject: IPEDS Thanks You for Early Response - <UnitID>

March 15, 2023

Dear Chief Executive:

The National Center of Education Statistics, part of the U.S. Department of Education, would like to extend its appreciation to your institution, and especially to your IPEDS Keyholder, <Keyholder name>. As of today (three weeks prior to the close of the Spring data collection), the required survey components for your institution, <Institution Name>, have been entered, edited, and locked.

Because IPEDS is a very large data collection involving a large number of institutions, completing the surveys and locking them early during the collection period is extremely helpful. Providing IPEDS data is a major undertaking, and we want you to know that we truly appreciate the timely response. We hope that you will pass along our word of gratitude to your Keyholder, as he or she is the one who is typically charged with overseeing the successful data entry and completion of the mandatory IPEDS surveys.

Again, please accept our thanks to you and your staff for your important contributions to the success of IPEDS.

Sincerely,

Tara Lawley
Program Director
Integrated Postsecondary Education Data System
National Center for Education Statistics

CC: <Keyholder Name>

Exhibit 28. Spring CEO Call Script for No Registered Keyholder

CEO Calls to Title IV Institutions - No Registered Keyholder
Guidelines and Script
Spring 2023

In an effort to get the remaining Title IV schools to register for IPEDS, beginning March 15, we will be making calls to those schools who have not registered. We have outlined some guidelines to follow when making these calls. Each of you will be getting a list of schools to work sorted by sector.

Goals of these calls:
1) Get the school to register for IPEDS as soon as possible and remind them of the deadline for IPEDS submission of April 5; or
2) Get a good reason for why the school should not be included in IPEDS

List of Sectors:
(0)   Central Office Administrative Unit
(1)   4-year public
(2)   4-year private, not-for-profit
(3)   4-year private, for-profit
(4)   2-year public
(5)   2-year private, not-for-profit
(6)   2-year private, for-profit
(7)   Less than 2-year public
(8)   Less than 2- year private, not-for-profit
(9)   Less than 2-year private, for-profit
(99)   New Institution

Guidelines to follow for contacting CEOs:

- Check Status of the school to see if it is still showing up as not registered. If they have registered since the list was generated, you do not need to call, but be sure to document why the call was NOT made.

- CHECK COMMENTS THOROUGHLY to see if there is any reason for the school not being registered. If a reason is given, you may not need to call them. For example, if they called us and said that they are no longer Title-IV, and the incident is pending review by project staff, you do not need to make the call.

- When you call the school, you will first ask to speak with the CEO (get his/her name from the Institution Identification page). If you cannot reach the CEO, please leave him/her a message but ALSO try to reach the Keyholder from last year (if there was one). Be sure to introduce yourself as being from the IPEDS help desk and state that you are following up regarding registration for the IPEDS data collection. An example script is shown below.

- In rare cases, the CEO may give you a reason why they do not think they need to register or participate in IPEDS. Keep good notes and document them in the Help Desk Application (HDA) thoroughly, then contact a project staff person.

- *You MAY also get some schools that submit combined data.* All schools need to submit their own IC, but other surveys can be combined, in specific situations. If the school is part of a parent-child relationship, but does not appear that way in the system, get the details of the arrangement so that we can set them up properly in the system.

Example script for contacting CEOs:

Hello, my name is _____, calling on behalf of the U.S. Department of Education concerning the IPEDS Spring Data Collection. May I speak with Dr./Mr./Ms. (CEO NAME)?

IF CEO IS UNAVAILABLE:
May I leave a message for Dr./Mr./Ms. (CEO NAME), or can you suggest a time at which I should call back?

LEAVE A MESSAGE THAT YOU CALLED AND ASK THAT THE CEO CALL THE IPEDS HOTLINE (877-225-2568) OR SET AN APPOINTMENT TO CALL BACK.

IF CEO IS AVAILABLE:
Hello Dr./Mr./Ms. (CEO NAME), I am calling concerning the IPEDS Spring Data Collection. In August and September, we sent letters to you requesting that you appoint a keyholder for IPEDS (Integrated Postsecondary Education Data System). Your keyholder has not registered for the current data collection, which opened in December. [IF there is an unregistered keyholder in the system, tell the CEO who that person is. If not, ask: Have you appointed a keyholder?]

IF YES:
      We need for the keyholder to register and begin data collection immediately in order to meet the April 5th deadline for the Spring data collection. Would you be able to follow-up with the keyholder? Or if you prefer, you can give me the name and phone number of the keyholder and I will be happy to call them.

IF NO:
      We need for you to appoint a keyholder immediately so they can register and begin data collection. The deadline for the collection is April 5th. If you could give me the name and phone number of that person now, I will be happy to call them and provide them with the ID and password necessary for them to register and begin data collection.

      OBTAIN KEYHOLDER NAME AND PHONE NUMBER IF POSSIBLE AND FOLLOWUP WITH THAT PERSON.

ADDITIONAL INFORMATION IF NECESSARY:

According to Section 490 of the Higher Education Amendments of 1992, completion of the IPEDS surveys is an important part of your institution's Program Participation Agreement (PPA) with the Department of Education and is mandatory for participation in federal student financial assistance programs.

Thank you very much for your time and cooperation.

Exhibit 29. Spring Close -3 Weeks Reminder Email No Data Since Winter

Subject: IPEDS Reminder – Spring Collection Closes in Three Weeks

March 15, 2023

Dear IPEDS Keyholder:

There are three weeks remaining in the Spring data collection, and we are scheduled to close promptly on April 5, 2023. During the Winter collection period you began (or completed) Human Resources (HR), Fall Enrollment (EF), Finance (F), and/or Academic Libraries (AL) components. However, our records indicate that you have not entered any information recently, and that you have not locked all the required surveys that are being conducted this Spring. All four survey components, if applicable to your institution, are required to be completed and locked prior to the end of the Spring collection.

While we understand that you are busy with many other responsibilities, we would strongly encourage you to enter and lock your data as soon as possible. As you know, under Section 487(a)(17) of the Higher Education Act of 1965, as amended, completion of the IPEDS surveys is an integral part of your institution's Program Participation Agreement (PPA) with the Department of Education.

We will be sending additional email reminders on March 22nd and March 29th. Also on March 22nd, we will begin calling the CEOs of institutions where keyholders have not yet begun entering data.

The IPEDS web-based collection system is located at: http://surveys.nces.ed.gov/ipeds and if you have questions concerning accessing the system, or entering, editing, or locking your data, please contact the Help Desk at 1-877-225-2568, or ipedshelp@rti.org.

Please do not disregard this email! If you believe that you have received this message in error, please contact the Help Desk. Thank you in advance for your assistance in this important project.

Best regards,

Tara Lawley
Program Director
Integrated Postsecondary Education Data System
National Center for Education Statistics

Exhibit 30. Spring Keyholder/CEO Call Script for No Data Entered

"NO DATA" Script: Keyholder/CEO Calls to Registered
Title IV Institutions with no survey data entered
Spring 2023 Collection

Guidelines and Script

In an effort to get the remaining Title IV schools to enter their IPEDS data, beginning March 22nd, we will be making calls to those schools that have not entered any survey data for their required Spring surveys: Human Resources (HR), Enrollment (EF), Finance (F), and Academic Libraries (AL). Outlined below are guidelines to follow when making these calls. Each of you will be getting a list of schools assigned to you in the Help Desk Application (HDA).

Goals of these calls:
1) Get the school to begin data entry as soon as possible and remind them of the deadline for Spring IPEDS submission of April 5th; or
2) Get a good reason for why the school should not be included in IPEDS.

ALL calls must be thoroughly documented in the call log in the HDA.

Guidelines to follow for contacting keyholder and/or CEOs:

- Institutions will be assigned in the HDA, thus any institution showing up in the call list currently has not begun entering data for their surveys (i.e. status of "NO DATA" or "No-Data"). Schools will automatically be removed from the list once they have started entering data.

- The first round of reminder calls apply ONLY to schools that have not started ANY of their Spring surveys. A second round of calls will be assigned later for institutions that may have started (or completed) HR, EF, F, or AL during the Winter, but have not done any data entry during the Spring collection.

- CHECK HDA COMMENTS THOROUGHLY to see if there is any reason for the school not making progress. If a valid reason is given, you do not need to call them (e.g. we are determining if they are still Title-IV eligible). *However, enter a comment explaining that you reviewed the comments and explaining WHY you are not calling.*

- When you call the school, you will ask to speak FIRST with the keyholder (KH). If the keyholder is no longer employed there, or is unavailable, then you will ask to speak with the CEO.
    - The Keyholder name and phone number can be located in the HDA (contacts screen) or in the collection system (DCS) on the "user" screen,
    - The CEO name and phone number is located in the DCS in the "Institution Identification" screen.

- Be sure to introduce yourself as being from the IPEDS helpdesk and state that you are following up regarding data entry for the IPEDS Spring data collection. An example script is included below.

- The keyholder or CEO may give you a reason why they do not think they need to participate in IPEDS. There should, however, be VERY few acceptable reasons. If they try to give you such a reason, please keep good notes and CONTACT Project Staff with this information.

- If the KH or CEO says that the data are being combined with another school, or that the school has closed, seek help from a Team Leader or Project Staff to determine how to handle the specific situation.

- Although you will only be calling schools with Keyholders, you should note that there are also users called "coordinators" and they have a later deadline of April 19th. If someone tells you that their deadline is April 19th, seek help from a colleague to make sure the user is really a coordinator.
  - Keyholder UserIDs start with "P" or "88G." Any _other_ IDs (starting with a 2-digit number) are "coordinator" users.

Example script for contacting Keyholders and CEOs:

First, try to contact the Keyholder:

Hello, my name is _____, calling on behalf of the U.S. Department of Education concerning the IPEDS Spring Data Collection. May I speak with Dr./Mr./Ms. (Keyholder NAME)?

IF keyholder IS UNAVAILABLE:
May I leave a message for Dr./Mr./Ms. (NAME), or can you suggest a time at which I should call back? (Or if you have already made 2-3 call attempts:) Is there someone else I can talk to about the IPEDS Spring data collection?

LEAVE A MESSAGE THAT YOU CALLED AND ASK THAT THE Keyholder/CEO CALL THE IPEDS Help Desk (877-225-2568) OR SET AN APPOINTMENT TO CALL BACK.

IF Keyholder is available:
Hello Dr./Mr./Ms. (KH NAME), I am calling concerning the IPEDS Spring Data Collection. As of today, we see that you have not yet begun entering data for the required Spring surveys. We wanted to make sure you were aware of the April 5th deadline. Is there anything I can help you with to assure that you are able to meet this deadline?
(If "NO"): Please remember that the deadline for entering your data is April 5th and that participation is mandatory for schools that participate in Title IV student financial aid programs. Thank you very much and have a nice day.
(If "YES") Answer any questions they may have.

If keyholder is unavailable, try to contact the CEO.
Hello, my name is _____, calling for the U.S. Department of Education concerning the IPEDS Spring Data Collection. May I speak with Dr./Mr./Ms. (CEO NAME)?

IF CEO IS UNAVAILABLE:
May I leave a message for Dr./Mr./Ms. (NAME), or can you suggest a time at which I should call back? (Or if you have already made 2-3 call attempts:) Or is there someone else I can talk to about the Spring data collection?

LEAVE A MESSAGE THAT YOU CALLED AND ASK THAT THE CEO CALL THE IPEDS Help Desk (877-225-2568) OR SET AN APPOINTMENT TO CALL BACK.

IF CEO IS AVAILABLE:
Hello Dr./Mr./Ms. (CEO NAME), I am calling concerning the IPEDS Spring Data Collection. As of today, your school has not yet begun entering data for the required surveys. We wanted to make sure you are aware of the April 5th deadline. I tried contacting your keyholder, Dr/Mr./Ms. (KH Name), but was unable to reach him/her.

We would very much appreciate your help because the surveys must be completed by April 5th and are mandatory for schools that participate in Title IV student financial aid programs.

Is there anything I can help you with to assure that you are able to meet the April 5th deadline?

(If "NO"): Then thank you very much for reminding your keyholder, and have a nice day.

(If "YES") Answer any questions they may have.

IF CEO THINKS SCHOOL IS OUT OF SCOPE FOR IPEDS, OBTAIN REASON AND RECORD DETAILS. Contact Project Staff with this information.

ADDITIONAL INFORMATION IF NECESSARY:

According to Section 490 of the Higher Education Amendments of 1992, completion of the IPEDS surveys is an important part of your institution's Program Participation Agreement (PPA) with the Department of Education and is mandatory for participation in federal student financial assistance programs.

Thank you very much for your time and cooperation.

Exhibit 31. Spring Close -2 Weeks Reminder Email to Keyholder for "No Data Entered" or "All Required Surveys Not Locked"

Subject: IPEDS Reminder – Spring Collection Closes in Two Weeks

March 22, 2023

Dear IPEDS Keyholder:

The Spring 2023 IPEDS data collection is scheduled to close in just two weeks, on April 5. Currently, our records indicate that you have not yet locked the required surveys that are being conducted this Spring.

All institutions are required to complete the Human Resources (HR), Enrollment (EF) Finance (F), and Academic Libraries (AL) components.

Please remember that you must lock each survey component for it to be considered a response. Use the "Am I Done?" feature to confirm that your required surveys are locked.

While we understand that you are busy with many other responsibilities, we would strongly encourage you to enter and lock your data as soon as possible. Section 487(a)(17) of the Higher Education Act of 1965, as amended, requires that, as a condition of continued participation in the federal student aid programs, all institutions must complete the IPEDS surveys.

The office of Federal Student Aid has provided the following warning to institutions that did not provide data during recent IPEDS collections: "We want to stress that compliance with these reporting requirements is an important obligation for all schools that participate in the federal student aid programs... An institution's failure to complete and submit these surveys is considered a serious violation of its obligations under the HEA and the regulations."

At this time, the Help Desk is beginning to call the CEOs of Title IV institutions that have not yet begun entering any data. In order to avoid receiving such a call, please begin entering your data as soon as possible. Following today's email reminder, we will send one additional email reminder, on March 29, to ensure your compliance with the collection deadline date of April 5, 2023.

The data collection website is located at http://surveys.nces.ed.gov/ipeds. If you have questions concerning accessing the system, or entering, editing, or locking your data, please contact the Help Desk at 1-877-225-2568, or ipedshelp@rti.org. The help desk will operate extended hours starting March 27 and continuing through the end of the collection on April 5 as follows: Weekdays 8:30am to 8:00pm, and Saturday (April 1) 9:30am to 6:00pm and Sunday (April 2) 1:30pm to 6:00pm, all times are Eastern.

Thank you in advance for your assistance in this important project.

Sincerely,

Tara Lawley
Program Director
Integrated Postsecondary Education Data System
National Center for Education Statistics

Exhibit 32. Spring Keyholder Call Script for Institutions with NEW Keyholder and All Required Surveys Not Yet Locked

New Keyholder Script: Keyholder Calls to Registered
Title IV Institutions with a new Keyholder and all surveys not locked
Spring 2023 Collection

Guidelines and Script

In recent years, new* keyholders have been most at risk for failing to complete all required surveys by the collection deadline. To better target these less experienced keyholders, we will be contacting them if all required surveys are not locked as of two weeks remaining in the collection.

*New keyholders are self-identified by selecting the "New Keyholder" radio button at the time of their registration in the IPEDS collection system.

Beginning March 22nd, we will be making calls to new keyholders if they haven't yet locked all surveys. Guidelines for conducting these calls are outlined below. Call assignments will be made within the Help Desk Application (HDA).

Goals of these calls:
- Confirm that the new keyholder is aware of the Spring IPEDS submission of April 5th;
- Confirm that the new keyholder is aware of all surveys required during the Spring collection;
- Offer assistance, if needed, to assist the keyholder in completing and locking the surveys.

ALL calls must be thoroughly documented in the call log in the HDA.

Guidelines to follow for contacting the keyholder:

- Check Status of the school in the Data Collection System (DCS) to determine if the school is still not yet complete (i.e. status other than "locked" or "complete" for the Human Resources (HR), Enrollment (EF), Finance (F), and Academic Libraries (AL) surveys).

    - If they have completed entering data (i.e. "locked," or "complete" as the status for ALL of the above surveys) since the time that list was generated they do <u>NOT</u> need to be called, but document this reason in the call log when resolving the incident.

- CHECK HDA COMMENTS THOROUGHLY to see if there is any reason for the school not making progress, or if the Keyholder has already been in contact with the help desk to seek assistance.

- When you call the school, you will ask to speak with the keyholder (KH). If the keyholder is no longer employed there, or is unavailable, then you will ask to speak with the CEO.

    - The Keyholder name and phone number can be located in the HDA (contacts screen) or in the collection system (DCS) on the "user" screen,

- Be sure to introduce yourself as being from the IPEDS helpdesk and state that you are following up regarding data entry for the IPEDS Spring data collection. An example script is included below.

- Although you will only be calling schools with Keyholders, you should note that there are also users called "coordinators" and they have a later deadline of April 19th. If someone tells you that their deadline is April 19th, seek help from a colleague to determine if the user is actually a coordinator. Keyholder UserIDs start with "P" or "88G." Any <u>*other*</u> IDs (starting with a 2-digit number) are "coordinator" users.

Example script for contacting Keyholders:

   Hello, my name is _____, calling on behalf of the U.S. Department of Education concerning the IPEDS Spring Data Collection. May I speak with Dr./Mr./Ms. (Keyholder NAME)?

IF keyholder IS UNAVAILABLE:

May I leave a message for Dr./Mr./Ms. (NAME), or can you suggest a time at which I should call back?

LEAVE A MESSAGE THAT YOU CALLED AND ASK THAT THE Keyholder CALL THE IPEDS Help Desk (877-225-2568) OR SET AN APPOINTMENT TO CALL BACK.

IF Keyholder is available:

Hello Dr./Mr./Ms. (KH NAME), I am calling concerning the IPEDS Spring Data Collection. ***Please note that all calls from the Help Desk may be monitored for quality control purposes*** Because you have identified yourself as a new keyholder, we are contacting you as a courtesy to make sure you are aware of the April 5th deadline for submitting Spring data.

Are you aware that your institution has surveys due by April 5th, which includes Human Resources (HR), Enrollment (EF), Finance (F), and Academic Libraries (AL)?

Are you the individual who will be completing the Spring surveys?

(*If NO*: Have you contacted the individuals responsible for those surveys and provided the blank forms, instructions, and due dates?)

(If YES: Have you located the blank forms and instructions for completing the surveys?)

Is there anything I can help you with to assure that you are able to meet this deadline? (If "YES") Answer any questions they may have.

Please keep the Help Desk phone number handy in case you have questions that we can assist you with. Do you need the phone number?

(If "YES") Provide phone number and email address.

We also wanted to encourage you to complete the surveys as soon as possible. Just to let you know, the Help Desk tends to get very busy toward the end of the collection, especially the last few days, and it is harder to reach us. In order that we can answer any questions that you have, please do not wait until the last minute.

Thank you for your time, and have a nice day.

*** A checkbox has been added in HDA. Once the script has been read, indicating that the call may be monitored for quality control purposes, the box should be checked, and this part of the script does not need to be read during future calls to the school.

Exhibit 33. Spring Close -1 Week Reminder Email to Keyholder for "No Data Entered" or "All Required Surveys Not Locked"

**Note: The CEO will be copied on this email IF the institution is on the "special call" list having missed a collection deadline during the prior 2 collection years.

Subject: IPEDS Reminder – Spring Collection Closes in One Week

March 29, 2023

Dear IPEDS Keyholder:

The Spring 2023 IPEDS data collection will close in one week, on April 5, 2023. As of today, your institution has not completed all surveys that are required this Spring.

Please do NOT ignore this email but if you feel you have received it in error, call the Help Desk at 1-877-225-2568.

Once the collection closes to keyholders on Wednesday, April 5, 2023, at midnight Pacific Time, you will not be able to submit, edit, or lock data and NO extensions can be granted. Please remember that each survey component must be locked to be considered a response.

If you have not locked the required IPEDS survey components by April 5, your institution will be referred to the office of Federal Student Aid for appropriate action. Section 487(a)(17) of the Higher Education Act of 1965, as amended, requires that, as a condition of continued participation in the federal student aid programs, all institutions must complete the IPEDS surveys. Title IV, HEA program regulations 34 CFR 668.84, 668.85, and 668.86 permit a fine of up to $59,017 for each violation.

The data collection system is located at: http://surveys.nces.ed.gov/ipeds. If you have questions concerning accessing the system, or entering, editing, or locking your data, please contact the Help Desk at 1-877-225-2568, or ipedshelp@rti.org. The help desk will operate extended hours through the end of the collection on April 5 as follows: Weekdays 8:30am to 8:00pm, and Saturday (April 1) 9:30am to 6:00pm and Sunday (April 2) 1:30pm to 6:00pm, all times are Eastern.

Thank you in advance for your assistance in this important project.

Sincerely,

Ross C. Santy
Associate Commissioner
Administrative Data Division
National Center for Education Statistics

Exhibit 34. Registration Confirmation Email

Subject: IPEDS Registration Confirmation - <mark>\<UnitID\></mark>

User name: <mark>\<UserName\></mark>
User ID: <mark>\<UserID\></mark>
Institution name: <mark>\<institution_name\></mark>

Thank you for completing the registration process for the IPEDS 2022-23 data collection.

The schedule for the 2022-23 data collection is as follows:

Fall 2022:	September 7, 2022 – October 19, 2022
Winter 2022-23:	December 7, 2022 – February 8, 2023
Spring 2023:	December 7, 2022 – April 5, 2023

You can get more information about the data collection at http://nces.ed.gov/ipeds, including survey forms, instructions, import specifications, and more. Please call the Help Desk if you have questions or problems.

IPEDS Help Desk
Toll Free 1-877-225-2568
ipedshelp@rti.org

Exhibit 35. Locking Confirmation Email to Keyholders

Subject: IPEDS Locking Confirmation for <mark>\<survey name\></mark> – <mark>\<UnitID\></mark>

The survey component data for <mark>\<survey name\></mark> for INSTITUTION: <mark>\<UnitID\></mark> - <mark>\<institution name\></mark> was locked on <mark>\<date\>.</mark> Please note that locking your data does not equal compliance. The data will be reviewed by NCES, and any inaccuracies will need to be addressed before your data are accepted.

These data are now read-only. If you need to make any changes, you can call the IPEDS Help Desk at 1-877-225-2568.

Use the Print Data/Get PDF option on the Surveys page if you wish to print out a copy of your submission.

The Department of Education's National Center for Education Statistics would like to thank you for your participation in the. Please be sure that you have locked ALL applicable surveys for this collection period.

IPEDS Help Desk
Toll Free 1-877-225-2568
ipedshelp@rti.org

Exhibit 36. Ready-to-Lock Email to Coordinators

Subject: IPEDS Survey Ready to be Locked: <mark><Survey_Name></mark> - <mark><UnitID></mark>

Dear IPEDS Coordinator: You now have lock access to <mark><survey_name></mark> for the institution: <mark><Inst_name> (<UnitID>).</mark>

IPEDS Help Desk
Toll Free 1-877-225-2568
ipedshelp@rti.org

Exhibit 37. UserID Confirmation Email

Subject: IPEDS UserID Reminder

Your User ID for the IPEDS Data Collection System is listed below. Please keep it in a secure place. If you also requested your password, for security purposes it will be sent in a separate email.

User ID: <mark><UserID></mark>

The IPEDS data collection system is located at: https://surveys.nces.ed.gov/ipeds/

IPEDS Help Desk
Toll Free 1-877-225-2568
ipedshelp@rti.org

Exhibit 38. Password Confirmation Email

Subject: IPEDS Password Reminder

Your Password for the IPEDS Data Collection System is listed below. Please keep it in a secure place.
If you also requested your UserID, for security purposes it will be sent in a separate email.

Password: <mark><Password></mark>

The IPEDS data collection system is located at: https://surveys.nces.ed.gov/ipeds/

IPEDS Help Desk
Toll Free 1-877-225-2568
ipedshelp@rti.org

Exhibit 39. 2023-24 Changes to IC and SFA

A number of changes to the Institutional Characteristics (IC) and Student Financial Aid (SFA) survey components were made for the 2023-24 data collection. NCES is aware that some of these changes have created confusion for data providers.

Based on your feedback, we are removing some of these changes. No changes to any survey component were intended to change the data that will be collected in the 2023-24 collection year – reporting should be the same as in the prior year. Note that NCES will be working on clearing some changes for the 2024-25 collection and beyond early in 2024. When these materials are available, institutions will be notified through This Week in IPEDS, and we strongly encourage institutions to review materials and provide comment.

The changes for the 2023-24 data collection are listed in the Table below.

	Changed instruction/FAQ/screen (where applicable; additions in red, deletions with red ~~strikethrough~~)	Change type
	Institutional Characteristics	
1	*CoA FAQ #1 – added transportation expenses back to other expenses (p.35)* How do I know what amounts to report for food and housing and other expenses for institutionally-controlled housing both on and off campus? Report the food and housing amounts used by your financial aid office for determining student budgets. The other expenses are the amount of money estimated by the financial aid office needed by a student to cover expenses such as laundry, transportation, entertainment, and furnishings. Do not include tuition, required fees, books, course materials, supplies, or equipment required for a program of study~~, or transportation expenses~~ with other expenses.	**Addition** and ~~**Deletion**~~
	Student Financial Aid	
2	*Removed references that were added about award years and cross-over periods, reverting to the instructions on the reporting period from the previous years. While meant to be clarifying, data providers reached out to us to let us know they were confused. (pp. 7, 8, 12, 13, 20, 21, 25, 27, 36, 39, 42, 44, 52, 55, 57, 59, 61, 67, 70)* Any time during academic year 2022-23~~, including cross-over financial aid award periods assigned to the 2022-23 academic year.~~ Any time during academic year 2022-23 ~~The financial aid award year from July 1, 2022 through June 30, 2023), including cross-over financial aid award periods assigned to the 2022-23 academic year.~~ **Reporting Period** The financial aid data reported for this component should be for the prior academic year as defined by the institution.~~, including cross-over financial aid award periods assigned to the prior academic year.~~	**Addition** and ~~**Deletion**~~

Reporting Period

The data reported for this component should be for the prior academic year ~~and includes crossover award periods assigned to the prior academic year~~. ~~For program reporters this typically coincides with the financial aid award year, which runs from July 1 through June 30.~~

Detailed Instruction

This section provides line-by-line instructions for the Military Servicemember and Veteran Benefits questions.

For the Post-9/11 GI Bill benefit, please provide in the first column the number of students receiving the benefit during ~~for~~ the July 1-June 30 reporting period ~~award year~~ (see coverage above). In the second column, provide the total dollar amount for each benefit during the same reporting period.

For the Department of Defense Tuition Assistance Program benefit, please provide in the first column the number of students receiving the benefit during ~~for~~ the October 1-September 30 reporting period ~~award year~~ (see coverage above). In the second column, provide the total dollar amount for each benefit during the same reporting period.

If no student(s) received benefits at your institution for one of the benefit programs ~~the award year~~, enter a zero (0) in the cell. In other words, do NOT leave the cell blank for a program that did not have any beneficiaries.

<u>What is the time period for which I should report financial aid amounts?</u>

Institutions should report aid that was awarded any time during the academic year.~~, including cross-over financial aid award periods assigned to the academic year.~~

3	*Revised General FAQ #2 to remove addition guidance that caused confusion. (p. 68)*	~~Deletion~~

<u>What is the reporting period covered by SFA for the 2023-24 collection year?</u>

For the 2023-24 data collection, institutions should report award or disbursement data for students **enrolled during academic year** 2022-23.

~~For Title IV participating institutions that enroll undergraduate students, report financial aid for the 2022-23 **award year**, including cross-over award periods assigned to the 2022-23 award year.~~

> ~~To determine the financial aid amounts to report for a given group of students, first identify the student category (e.g., full-time, first-time degree/certificate-seeking undergraduates). Second, determine the student count for that category for the 2022-23 **academic year**. Third, determine the financial aid awarded to these students for the~~

	~~2022-23 award year. Do not forget to include cross-over award periods assigned to the 2022-23 award year.~~ **Important Note:** If the financial aid student counts do not match student counts reported in another IPEDS survey component, please work with the data reporter for the survey component at your institution to determine why the numbers are different. Contact the IPEDS Help Desk if you need assistance revising or correcting data. For institutions that enroll undergraduate and graduate students who received military or veteran benefits: 　• ~~Report for aid awarded any time during the 2022-23 financial aid award year (July 1, 2022, to June 30, 2023), including aid disbursed late (after June 30, 2023) for the~~ **2022-23 award year** ~~known to the institution).~~ 　• The data reported for the **Post-9/11 GI Bill** benefit questions should be for the prior academic year, from July 1 to June 30. 　• The data reported for the **Department of Defense Tuition Assistance Program** questions should be for the prior academic year, from October 1 to September 30.	
4	*Added instruction 'enrolled in the institution's largest program' back to Part A. This was never supposed to be removed (p. 19).* Of those on Line 05, those enrolled in the institution's largest program **paying the lower of in-state or in-district tuition rate for public institutions** awarded grant or scholarship aid from the federal government, state/local government, or the institution Of those on Line 05, those enrolled in the institution's largest program **paying the lower of in-state or in-district tuition rate for public institutions** awarded any <u>Title IV federal student aid</u>	**Addition**

Please reach out to the IPEDS Help Desk, ipedshelp@rti.org or 877-225-2568, if you have any questions.

Sincerely,

Tara Lawley
Postsecondary Branch Chief
Administrative Data Division
National Center for Education Statistics

CC: SFA contact, if applicable