

## Interim Report Template Instructions

1. Download the report template and instructions from the FTP site. The link to the Templates folder is:  
  
[ftp://ftp.state.pa.us/pub/PDE\\_PUBLIC/HigherEd/TA/Templates/](ftp://ftp.state.pa.us/pub/PDE_PUBLIC/HigherEd/TA/Templates/)
2. Either complete the report by manually entering the data, or by importing the data from another source. See *Importing Data to the Interim Report Template* for instructions on formatting your data file for import, and on importing the data file.
3. Complete the contact information fields on the Contact Information tab.
4. Complete the Transfers tab by manually entering the information, or by copying data to it from an imported data file.
5. The fields on the Transfers tab should be completed as follows:

Data required by Article XX-C:

IPEDS Unit ID	Enter IPEDS Unit ID code for the Institution of Origin.
Institution of Origin	Enter the name of the institution from which the student(s) transferred to your institution.
Number of Students Transferring In	Enter the number of students who transferred to your institution from the institution of origin (column A). See "Revised Transfer Data Reporting Requirements 11-15-06.doc" on FTP site for instructions as to what students to include for your reporting institution (community college or four-year institution).
Number of Credits Accepted	Enter the total number of credits from each institution of origin (column A) that transferred to your institution.

Optional data:

General Education	Enter the total credits accepted as general education.
Major	Enter the total credits accepted as major.
Free Electives	Enter the total credits accepted free electives.
Number of Credits Rejected	Enter the total credits rejected from the institution of origin.
Grade Too Low	Enter the total credits rejected as low grade.
Course Does Not Bear College Credit	Enter the total credits rejected as not bearing college credit.
No Equivalent Course Offered	Enter the total credits rejected as not having an equivalent course at your institution.

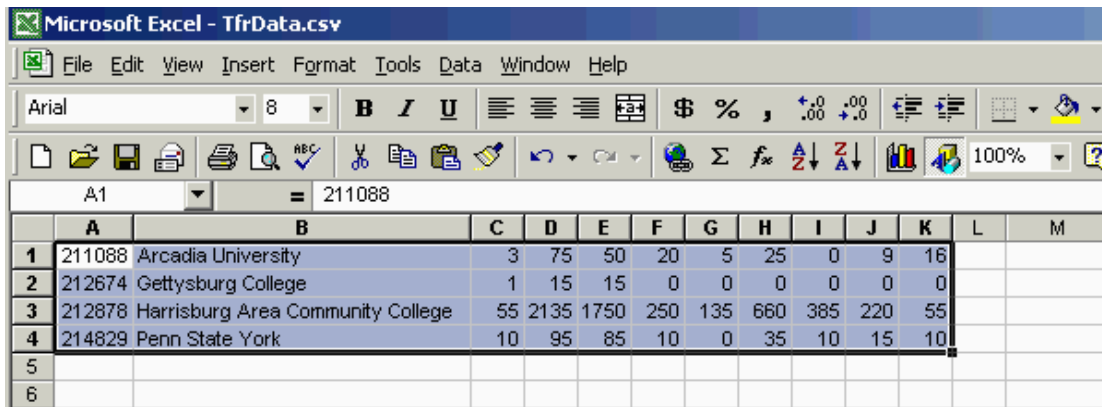
6. If your institution does not currently track or cannot report any of the optional data fields, leave those fields blank in the workbook. All data elements required by the legislation must be reported.
7. A table of IPEDS Unit ID numbers for higher education institutions in Pennsylvania and nearby states is available on the FTP site at [ftp://ftp.state.pa.us/pub/PDE\\_PUBLIC/HigherEd/TA/Templates/](ftp://ftp.state.pa.us/pub/PDE_PUBLIC/HigherEd/TA/Templates/):

*IPEDS\_InstitutionTable.csv* is a comma-delimited table. This file can be imported and linked to your report data if your IT support staff does not have IPEDS Unit IDs already in the system.

*IPEDS\_InstitutionTable.xls* is a Microsoft Excel version of the same table. This readable format can be used to manually look up IPEDS Unit IDs.



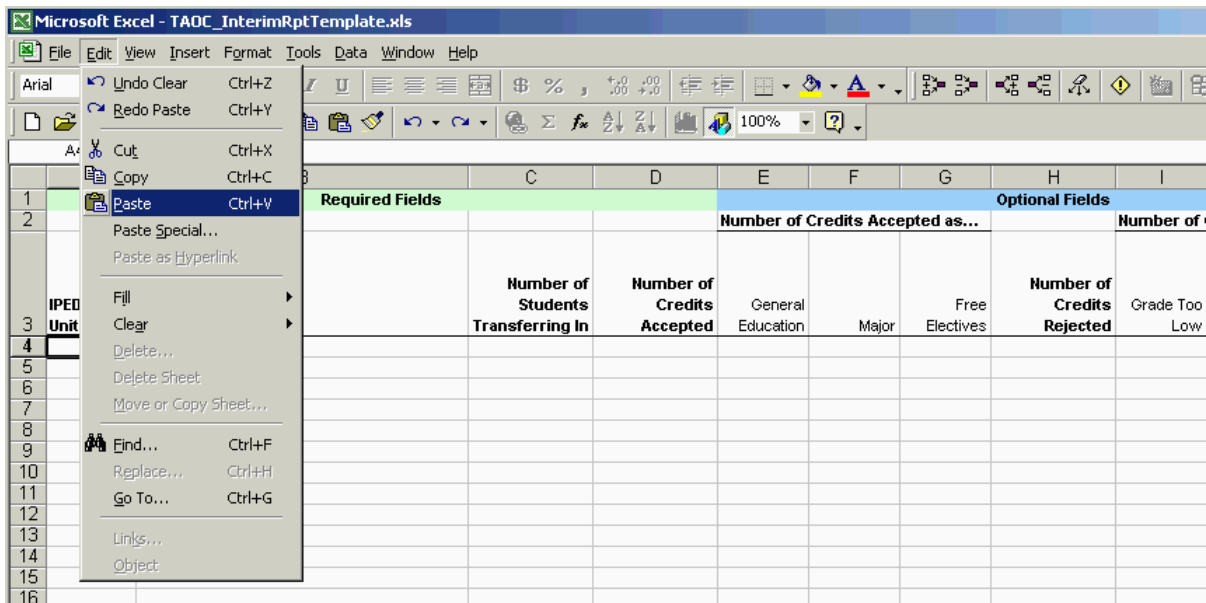
2. Check and confirm that all expected data appears in the spreadsheet.
3. Use the mouse pointer to select the first row and column of information. If the first row of the spreadsheet contains field names, don't include them in the selection.
4. With the first row and column still highlighted, scroll down to the last data row, and scroll left to the last data column.
5. Press and hold the Shift key, and while holding it, click the last row and column. This should highlight the entire data area of your file:



6. With the data area highlighted, click Edit, Copy.

Copying the data to the interim report template

1. Click File, Open, and open the Interim Report Template workbook. Click the Transfer Data tab.
2. Click in cell A3 to highlight it.
3. Click Edit, Paste to paste the information you copied from the imported data file:



The pasted data should look like this:

Required Fields				Optional Fields				
IPEDS Unit ID	Institution of Origin	Number of Students Transferring In	Number of Credits Accepted	Number of Credits Accepted as...			Number of Credits Rejected	Grade
				General Education	Major	Free Electives		
211088	Arcadia University	3	75	50	20	5	25	
212674	Gettysburg College	1	15	15	0	0	0	
212878	Harrisburg Area Community College	55	2135	1750	250	135	660	
214829	Penn State York	10	95	85	10	0	35	

4. Click File, Save to save the data in the Report Template workbook.
5. Complete the identification fields on the first tab of the workbook.
6. Click File, Save again to save the workbook.
7. Close the workbook.

Submitting the interim report to PDE

1. Rename the interim report workbook, using a name that includes the prefix "Tfr0506\_" and a shortened version of the name of your institution. For example, Bloomsburg University's file could be named

Tfr0506\_PASSHEBbloomsburg.xls

2. Attach both the completed report workbook and the explanation document to an email. Send the email to

katshaw@state.pa.us

In the subject line, enter "TAOC Interim Report" followed by your institution name. Example:

TAOC Interim Report – Bloomsburg University

Technical assistance

If you have questions about completing the template, please send email to

mvanders@state.pa.us

In the subject line, enter "TAOC Interim Report Assistance".

Include a brief summary of the question or problem you have, along with the name, email address, and telephone number of the person to be contacted about the issue.

## File specification

This file specification can be used to prepare a data file for import into the MS Excel interim report template.

Excel will import comma-delimited ASCII files with .CSV, .ASC, or .TXT extensions.

Each file record should begin on a new row of the file.

If reporting the optional data, each file record should have all 11 data fields represented. Any field for which no data is available should be represented by a blank or null value in the file, denoted by two adjacent commas.

In this sample record fragment, the values shown are 250, 125, no data available, 750:

```
...250,125,,750...
```

Do not include a header record (field names in first row).

If only the required data elements are being reported, each file record should have all 4 required data fields represented.

	<i>Field</i>	<i>Type</i>	<i>Length</i>	<i>Required or Optional</i>	<i>Comments</i>
1	IPEDS Unit ID	String	6	<b>Required</b>	
2	Institution of Origin	String	75	<b>Required</b>	
3	Number of Students Transferring In	Long Integer		<b>Required</b>	
4	Number of Credits Accepted	Long Integer		<b>Required</b>	
5	General Education	Long Integer		Optional	
6	Major	Long Integer		Optional	
7	Free Electives	Long Integer		Optional	
8	Number of Credits Rejected	Long Integer		Optional	
9	Grade Too Low	Long Integer		Optional	
10	Course Does Not Bear College Credit	Long Integer		Optional	
11	No Equivalent Course Offered	Long Integer		Optional	

### Examples

Example 1:

In this example, the reporting institution is reporting only the required fields; nothing is reported in the optional fields.

```
212878,Harrisburg Area Community College,55,2135
```

Example 2:

```
212878,Harrisburg Area Community College,55,2135,1750,250,135,660,385,220,55
```

In this example, the reporting institution had 55 students transfer in from HACC during the report period. Those students successfully transferred 2,135 credits to the reporting institution. Of the transferred credits, the breakdown of transferred credits was

```
1750  General Education
250   Major
660   Free electives
```

The reporting institution also rejected 660 credits taken by students transferring from HACC, for the following reasons:

```
385   Grade Too Low
```

220 Course Does Not Bear College Credit  
55 No Equivalent Course Offered

**Example 3:**

212878,Harrisburg Area Community College,55,2135,1750,250,135,,,,

In this example, the reporting institution reports nothing in the field positions for rejected credit counts. This shows that the reporting institution does not currently record, or cannot report, on these data elements.

**Sample data file (with optional data):**

211088,Arcadia University,3,75,50,20,5,25,0,9,16  
212674,Gettysburg College,1,15,15,0,0,0,0,0,0  
212878,Harrisburg Area Community College,55,2135,1750,250,135,660,385,220,55  
214829,Penn State York,10,95,85,10,0,35,10,15,10  
...etc.