

## Contents Part I

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## INTRODUCTION

### BACKGROUND

The need for an improved information delivery system capability within the University of Wisconsin System became apparent by 1973 with the occurrence of two events: the implementation of merger and the public demand for increased accountability.

It was recognized that the degree to which an effective system of higher educational institutions could be established and maintained in Wisconsin – a system that would be responsive to the needs of the state as well as to the desires of students and the requirements of scholarship – would depend, in large part, upon the ability of university decision-makers at every level to respond to current and future decision-making needs and to external (Executives, Legislature and Federal) requests with valid, reliable and timely information.

Toward that end, efforts were initiated during 1972 to develop an integrated information system within System Administration (then referred to as “central administration”) which would contain the minimum set of data necessary to support systemwide planning and reporting responsibilities. As an initial goal in that developmental process, the foundation of such a system was to be in operation by the fall term of 1973.

The first step in the establishment of the information delivery capability was to identify the decision-making and reporting requirements within System Administration to be served by the system and then to define the minimum set of data elements necessary to the accomplishment of those responsibilities.

Once the minimum set of data elements had been identified, the specifications for each data element were detailed and compiled in a Data Element Dictionary (DED). Currently, data elements dealing only with areas of curriculum, students, applications, and physical facilities have been identified and placed in the dictionary. Before any data elements are included in the final DED, the data elements are developed through a process involving evaluation and definition by System Administration staff, and institutional review.

Once the data elements have been included in the DED, their collection is facilitated through the **Central Data Request (CDR)**. The CDR is the means by which the core database will be created and maintained within System Administration in support of meeting systemwide planning and management decision-making and reporting responsibilities.

## OVERVIEW

The guidelines for the Central Data Request (CDR) are described in two volumes: the CDR Specifications and the CDR Table Code Book.

1) CDR Specifications: This volume is divided into several parts: 1) an Introduction, b) the Data Element Dictionary, and c) a Data Submission Procedure section for each unit, campus, or agency contributing data to the university systemwide database.

a) The purpose of the Introduction is to provide some background concerning the historical development and philosophy of the CDR, as well as a general overview of the organization and contents of the CDR.

b) The Data Element Dictionary (DED) is introduced by a general section which illustrates the format of the data specification sheets by means of an example. This general introduction is followed by four main sections which contain the sub-sets of data elements that relate to the curricular, student, physical facilities, and Multiple Applications and Admissions Database (MAAD) data areas. Each data element section is prefaced by an explication of the configuration of data elements that constitute a logically complete record for that particular data area, such as data regarding an individual student, a course or course section, or a physical facility. With this understanding of what constitutes a logically complete data record for a given data area, the detailed specifications of each element in that data area are outlined on the data element description sheets.

Some specific data element codes are not indicated on the description sheets in the DED, but instead are presented in the CDR Table Code Book (see below). There are two main cases where codes are handled in this manner: (1) the codes represent an established, widely employed coding convention of some state, federal or commercial agency, or (2) the coding considerations for the given data element are of such magnitude that the codes cannot be contained on the data element description sheets.

c) The purposed of the Data Submission Procedure section is to identify for each campus or other agency what set of data elements is being requested, at what time, and in what mode and format it is to be submitted. This portion of the CDR is divided into several major sections: a discussion of the specific data submission dates for each campus or agency during a given year; a discussion of general, technical considerations that apply to all data submissions; and a discussion of specific requirements that surround each of the different data formats that are employed in the several data submissions for each campus or agency during the year.

2) The CDR Table Code Book: This volume represents the accompany CDR Table Code Book. Two of the coding systems in the CDR Code Book are maintained in cooperation with unit personnel. These two are the Curricular Area Codes and the Major Codes.

## CDR CONTACT PERSONS

The purpose of this section is to define the terms used to refer to the individuals who are responsible for the contents of the CDR document and for overseeing the processing of the data submissions. The names of the individuals currently responsible for the functions are listed. Gail Bergman, Acting Director of the Office of Policy Analysis and Research, is the overall CDR Administrator. She can be reach at (608) 262-6718, gbergman@uwsa.edu.

### CDR Area Manager

The area managers are responsible for the System Administration activities related to specific data area of the CDR. They are responsible for the definitions and editing criteria for the data elements within their data areas.

<b>DATA AREA</b>	<b>AREA MANAGER</b>	<b>PHONE #</b> (area code 608)	<b>EMAIL ADDRESS</b>
Student (Academic Year and Summer)	Gail Bergman	262-6718	gbergman@uwsa.edu
Financial Aid	Kevin Welch	262-2623	kwelch@uwsa.edu
Multiple Applications and Admissions Data (MAAD)	Kevin Welch	262-2623	kwelch@uwsa.edu
Curricular	Sue Buth	262-1751	sbuth@uwsa.edu

### CDR Technical Coordinator

The CDR Technical Coordinator assists the activities of the CDR Area Managers by coordinating the technical processing of the CDR i.e., monitoring the submission of the data and coordinating the maintenance of the CDR data. Eric Durkee, of the Office of Policy Analysis and Research, is the CDR Technical Coordinator. He can be reached at (608) 262-4939.

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### Code Table Manager

The code table managers are responsible for approving changes to the code table in Volume II of the CDR.

<b>CDR CODE TABLE</b>	<b>TABLE MANAGER</b>	<b>PHONE #</b> (area code 608)	<b>EMAIL ADDRESS</b>
Degrees	Yufeng Duan	265-6776	yduan@uwsa.edu
Majors	Yufeng Duan	265-6776	yduan@uwsa.edu
Curricular Area Codes (CAC/UDDS)	Sue Buth	262-1751	sbuth@uwsa.edu
College Codes	Todd Bailey	263-3743	tbailey@uwsa.edu
Address Table (city/state/zip/country)	Jing Chen	265-9795	jchen@uwsa.edu
High School Codes	Jing Chen	265-9795	jchen@uwsa.edu
CDR Dates Table	Eric Durkee	262-4939	edurkee@uwsa.edu
Cross-Listed Course Sections	Eric Durkee	262-4939	edurkee@uwsa.edu
Instructional Fund Table	Eric Durkee	262-4939	edurkee@uwsa.edu
Financial Aid Table	Kevin Welch	262-2623	kwelch@uwsa.edu

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**CDR Liaisons**

The CDR liaisons are institutional representatives responsible for the coordination of all activities at their institutions which relate to the preparation and submission of CDR data. As a part of these coordination responsibilities, liaisons will work with functional area staff (such as in Admissions, Financial Aid, and Registrar’s Offices) and with information technology staff to ensure the accuracy and completeness of CDR data submissions for their institution. For “PeopleSoft campuses,” liaisons will represent their institution on CDR issues related to the CDR/MAAD/TIS interface programs, ensuring involvement from functional and technical staff so that informed and timely decisions can be made.

<b>CENTRAL DATA REQUEST CAMPUS LIAISON PERSONNEL</b>			
<b>UW CAMPUS</b>	<b>LIAISON / TITLE</b>	<b>PHONE #</b>	<b>EMAIL ADDRESS</b>
<b>Madison</b>	<b>Clare Huhn</b> Sr. Policy & Planning Analyst	608-265-9276	chuhn@vc.wisc.edu
<b>Milwaukee</b>	<b>Stephen Micke</b> Research Analyst	414-229-6611	micke@uwm.edu
<b>Eau Claire</b>	<b>Andrew Nelson</b> Institutional Research	715-836-5368	nelsonan@uwec.edu
<b>Green Bay</b>	<b>Debbie Furlong</b> Policy and Planning Analyst	920-465-2374	furlongd@uwgb.edu
<b>La Crosse</b>	<b>Natalie Solverson</b> Institutional Research	608-785-8006	nsolverson@uwlax.edu
<b>Oshkosh</b>	<b>Mike Watson</b> Institutional Research	920-424-2184	watson@uwosh.edu
<b>Parkside</b>	<b>Rhonda Kimmel</b> Registrar	262-595-2237	rhonda.kimmel@uwp.edu
<b>Platteville</b>	<b>Roger Jones</b> Institutional Research	608-342-1416	jonesr@uwplatt.edu
<b>River Falls</b>	<b>Dan Vande Yacht, Interim</b> Registrar	715-425-3342	daniel.vandeyacht@uwrf.edu
<b>Stevens Point</b>	<b>Dan Kellogg</b> Registrar	715-346-2046	dkellogg@uwsp.edu
<b>Stout</b>	<b>Tammy Cutsforth</b> Budget, Planning and Analysis	715-232-2316	cutsfortht@uwstout.edu
<b>Superior</b>	<b>LeAnn Brown</b> Policy & Planning Analyst	715-394-8355	lbrown20@uwsuper.edu
<b>Whitewater</b>	<b>Chunju Chen</b> Director of Institutional Research	262-472-1276	chenc@uww.edu
<b>Colleges</b>	<b>Larry Graves</b> Registrar	608-265-9048	larry.graves@uwc.edu
<b>Extension</b>	<b>Laura Kite</b> Outreach & E-Learning	608-262-5374	laura.kite@learn.uwsa.edu

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## CDR UPDATE PROCEDURES

The CDR document is updated annually by System Administration to reflect refinements identified during the year. These updates include additions, deletions, and/or clarifications of data elements and edits, changes to the input streams, routine updating of code tables, and changes in routine items such as the number of weeks in a semester and data submission schedules. Additions of new submissions to the CDR are handled by special updates. This section describes the annual process for updating the CDR document.

### Schedule

October – February:	Discussion of update needs for ensuing year (System Administration and institutions)
March:	CDR update compiled (System Administration)
Spring (April/May):	CDR update distributed to institutions
April – June:	Institutions review preliminary code tables
April – May:	Programming specifications written (System Administration and institutions)
June – August	Programming changes implemented (System Administration and institutions)
July:	Institutions finalize code tables and notify System Administration
Summer (August)	CDR update of final code tables compiled and distributed to institutions. Guidelines for academic year also distributed at this time. System Administration and institutions update code tables.

The annual CDR update applies to the academic and fiscal year which follows the update. For example, the CDR update distributed April 2001, applies to the CDR data submissions for the summer of 2001 and the 2001-02 academic and fiscal year.

### System Administration

Decisions to update a particular section of the CDR are made by System Administration staff throughout the year. All items to be updated for a particular year should be reviewed and discussed before March of the previous year. The CDR update is prepared for final review by the CDR Technical Coordinator and distributed to the institutions in the spring. With the exception of the code tables, whose final versions are not distributed until the summer, all changes to the CDR for the ensuing year are final as of the Spring update. Changes to edit programs and CDR-related functions are made over the summer and are coordinated by the appropriate data managers.

Volume 2 of the CDR contains code tables. The maintenance and update responsibilities for all the CDR code tables are summarized below.

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### Institutions

The CDR updates are sent to the CDR liaisons at each institution. The CDR liaison functions as the institutional coordinator and informs institutional personnel responsible for providing CDR data of any changes. Each liaison should respond to the Spring CDR update in writing, no later than July 15, indicating concurrence with the update or describing problems which the update may cause. The institutions should make required changes to edit programs and CDR related functions over the summer. Appropriate updating of edits facilitates the entire CDR collection process and makes possible early distribution of reports from the analytical systems that use CDR data.

It is especially urgent that the CDR liaison review the preliminary tables with the appropriate institutional personnel to be sure that these tables reflect current conditions.

### CDR Code Table Handling

The following summarizes the schedule for issuing CDR code tables and the offices that should be involved in reviewing the various CDR code tables.

#### **Curricular Area (CAC/UDDS)**

##### Preliminary – Spring

The CDR liaison should review this table with the institutional budget officer to be sure that the UDDS numbers are current and reflect the proper budgeted departments. The CAC numbers should be reviewed with the registrar to be sure that all departments granting student credits are properly represented. Discipline areas for new CAC codes are assigned in conjunction with the System Administration Academic Affairs office. Any questions concerning CAC/UDDS codes should be addressed to the table manager.

##### Final – Summer

#### **Majors**

##### Preliminary – Spring

New codes are issued by the table manager upon request. However, a major code is not added or revised without approval of the System Administration Academic Affairs office. The final CDR major code table for an institution should contain all majors which are valid and operational as of the date of the table. The CDR liaisons should review the preliminary table with their institutional Academic Affairs office to be sure that all valid majors are properly reflected. Any questions regarding major codes should be addressed to the table manager.

##### Final – Summer

#### **Degrees**

##### Preliminary – Spring

New codes are issued by the table manager upon request. However, a degree code is not added or revised without the approval of the System Administration Academic Affairs office. The final CDR degree code table for an institution should contain all degrees which are valid and operational as of the date of the table. The CDR liaisons should review the preliminary table with their institutional Academic Affairs office to be sure that all valid majors are properly reflected. Any questions regarding degree codes should be addressed to the table manager.

##### Final – Summer

New codes for the following tables are issued by the table manager upon request. The Spring and Summer CDR updates contain a summary sheet of changes to these tables that occurred since the previous updates; complete listings of the tables are available upon request.

College Codes  
High School Codes  
Address Table

THE UNIVERSITY OF WISCONSIN SYSTEM  
**GUIDELINES FOR THE CENTRAL DATA REQUEST**

-Academic Year-

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This paper highlights certain policies and procedures that pertain to the effective operation of the Central Data Request (CDR) during the academic year.

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A. Preliminary Enrollments for Early External Reporting

Unduplicated headcount and full-time equivalent (FTE) enrollments of undergraduate and graduate students, as of the tenth day of instruction, are to be reported by request to:

Sue Buth  
Office of Policy Analysis and Research  
University of Wisconsin System  
1538 Van Hise Hall  
1220 Linden Dr.  
Madison, WI 53706

Telephone: 608-262-1751  
FAX Number: 608-265-3175

B. Date of Record: Student Population and Credits

The date of record is the end of the tenth day of on-campus credit course instruction, except for Extended Degree Program activity which is documented in the next section. While the processing of data may continue for several days thereafter, only enrollments valid as of the date of record may be submitted on the CDR. The specific dates of record for each institution are listed in the CDR Volume I, Part III, Section A.

Student enrollments and associated courses/credits are to be submitted if the student has met two criteria by the end of the tenth day of instruction: (1) that the student has registered and (2) has made an appropriate financial commitment to the institution. An appropriate financial commitment is one in which the student has made a cash payment (either in full or 40% of the obligation), or a signatory commitment for payment of the fees, or finalized arrangements for third-party payment (such as student aid or private assistance).

1. Student Population

- a. The following types of students should be included in the CDR submission:
  - i. Withdrawals: students who register and make financial commitment (as outlined above), but withdraw from the institution after instruction begins.
  - ii. Senior citizen auditors: students age 60 and over who are exclusively auditing courses should be included in the CDR submission.
  - iii. OASDI Students: Wisconsin resident students receiving federal old age, survivors, and disability insurance benefits (OASDI) who are exclusively auditing courses should be included in the CDR submission.

- b. The following types of students should not be included in the CDR submission:
- i. Early Withdrawals: students who advance register with an appropriate financial commitment, but subsequently formally withdraw from the institution prior to the first day of instruction.
  - ii. No shows: students who register but do not pick up a study list or perform a similar action by which it might be assumed that they are intending to attend class.
  - iii. Non-committed: students who have gone through the registration procedure but have not made either a cash (40% of obligation) or a signatory commitment for payment of their fees or have not finalized arrangements for third-party payment.
  - iv. Late registrants: students who register and make an appropriate financial commitment, but do so after the date of record.

2. Associated Courses and Credits

The courses and credits on the CDR student file should reflect all course changes through the end of the tenth day of classes (i.e., all course adds and drops registered before the end of the tenth day of instruction must be processed. Courses for which registration occurs after this tenth day cutoff are not to be included in the CDR files).

Note: The CDR files submitted to System Administration reflect the “reality” that existed at the end of the tenth day of instruction with the exceptions indicated under B.1. The time period between the end of the tenth day and the CDR submission should be utilized to correct errors and supply any missing data relative to other CDR data.

C. Interinstitutional Agreements and Off-Campus Credit Courses

1. UW-Extension Credit Courses (Interinstitutional Agreements)

- a. Degree Credit Programs: All degree credit activities funded by UW-Extension should be submitted on the student and curricular CDR.
- b. Non-Credit Programs: Non-credit programs should not be submitted on the student nor the curricular CDR.

2. Off-Campus Credit Courses Not Included in Interinstitutional Agreements

Students registered in off-campus degree credit courses should be submitted on the student and curricular CDR.

Courses taught under (1) Interinstitutional Agreements and (2) off-campus credit courses meeting the criteria stated above should be included in the CDR submission if the course registration takes place before the institution’s sixth-week files are transmitted to System Administration. These submission guidelines for Interinstitutional Agreement courses and off-campus credit courses allow the institutions greater flexibility in capturing these courses that begin instruction later in the term. Submissions are not to be delayed beyond the sixth-week because of this flexibility. Students who have (advance) registered for these courses, but have not made appropriate financial arrangements by the cut-off date should not be reported in the CDR submission.

Note: For on-campus credit courses, the date of record is the end of the tenth day of instruction for that term; i.e., there is no variance to the date of record for on-campus credit courses regardless of when they start in the term. See Section B of these reporting guidelines.

D. Audit Credits

All audit credits are to be submitted on the CDR files at full credit equivalency for the course (or at the minimum credits for variable credit courses unless the student is paying fees for more than the minimum).

E. Contract Courses

All contract courses, regardless of funding source, should be reported. See data element Primary Funding Source (DE 1500).

F. Study Away/Exchange Students

Beginning with Fall 1995-96 all study abroad/away and exchange students are to be reported on the CDR.

G. New Freshman

The definition of new freshman is any degree-seeking undergraduate student entering for the first time with no creditable course work in higher education (other than during summer session or while enrolled in high school).

Note: For analytical purposes all students with a Current Entrance Status (DE 2240) of 'N' will be grouped with new freshmen regardless of the classification ((DE 2210) 'A', 'B', 'C' or 'D') submitted by the institution.

H. Resident Status (Tuition/Fee Basis)

1. Reciprocity Students. All Minnesota and Michigan students who paid tuition/fees under the respective reciprocity agreement should be coded as reciprocity students for resident status.
2. Non-resident Tuition Exemptions. Wisconsin Statutes provides for qualified individuals to be exempted from non-resident tuition under criteria set forth in s. 36.27(2), Wis. Stats.

I. Multicultural Students

Student race/ethnicity identification should be reviewed and corrected prior to the CDR submission. Reporting using Race/Ethnicity (DE 2600 – DE 2670) will only use race designations for citizens, permanent residents, or refugees/political asylees. Careful reporting will facilitate the proper development of the various subdivisions of students required for federal and other reporting. This information is not used in individually identifiable form; it is used to meet aggregate reporting requirements.

J. Majors Associated with Degrees

Only those majors approved by UW System Office of Academic Affairs should be submitted as majors associated with degrees conferred on the post-term submission of the CDR.

THE UNIVERSITY OF WISCONSIN SYSTEM  
**GUIDELINES FOR THE CENTRAL DATA REQUEST**

-Extended Degree Program-

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This paper highlights certain policies and procedures that pertain to the effective inclusion of Extended Degree Program (EDP) information in the regular Central Data Request (CDR) during the academic year.

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As of academic year 1991-92, the EDP information has been incorporated into the fall and spring terms sixth-week curricular CDR submissions and the sixth-week and post-term student CDR submissions. All curricular and student data elements (unless otherwise specified below) will be required. Please note this process requires the inclusion of EDP course information in the curricular CDR. The separate annual EDP CDR, which has paralleled the degree student CDR in format and data elements, has been discontinued.

For the CDR, EDP course section credit activity will be defined as follows. Only course sections taken by EDP students which are not part of the regular on-campus degree instruction or taught by UW-Extension are to be identified as EDP course work and reported in accordance with the guidelines below. Course sections taken by EDP students which are part of the regular on-campus degree instruction or taught by UW-Extension will be reported on the curricular and student CDR during the semester of their occurrence in accordance with the regular CDR guidelines. These course sections will not be identified on the CDR as EDP work.

The procedures employed to incorporate EDP information into the fall and spring CDR submissions are as follows. All EDP course work taken by EDP students will be submitted in accordance with these guidelines.

A. End of the EDP Reporting Period

All cumulative EDP course sections registered for by EDP students during the period January 1 to June 30, should be included in the sixth-week fall CDR submission of the subsequent academic year, with June 30 begin considered the end of the reporting period. Conversely, all cumulative EDP course sections registered for by EDP students during the period July 1 to December 31, should be included in the sixth-week spring CDR submission of the same academic year, with December 31 being considered the end of the reporting period.

If a student registers for an EDP course section during the above specified six month period and does not drop the course section or withdraw from the program within the first 30 days in order to receive a fee refund, these credits should be included in the CDR submission. The EDP course section credits should be reported even if the student registers for the course and completes the course work prior to the end of the EDP reporting period.

B. Official Student Population

For CDR purposes, EDP information should be reported for a student if all of the criteria listed below have been met.

1. The student has registered for at least one EDP course section.
2. The student has made an appropriate financial commitment to the institution. An appropriate financial commitment is one in which the student has made a cash payment (either in full or 40% of the obligation), a signatory commitment for payment of the fees, or finalized arrangements for a third-party payment (such as student aid or private assistance).

3. The student has not withdrawn from the EDP during the first 30 days after registration and received the designated fee refund.

An EDP student and associated credits are to be reported via the CDR only if the student has fulfilled all of these criteria by the official EDP end of period date.

C. EDP Associated Courses and Credits

The course sections and associated credits for the official EDP population reported on the CDR should reflect all course changes (drops/adds) which occur during the six months prior to the EDP end of period date. Drops that occur after the end of period date will not be reflected in the CDR. Course adds that occur after the end of period date will be reported on the next CDR submission.

D. Withdrawals

If a student registers for an EDP course section less than 30 days before the end of period date and later withdraws from the program within the 30 day period after registration, but after the end of the EDP reporting period, this student and associated EDP credits should be reported in the CDR submission.

The post-term data element Date of Withdrawal (DE 2500) will not be used for a student who withdraws from the EDP. This data element is reserved to indicate when a regular on-campus student totally withdraws from a semester's activity.

E. Prior Learning Credits

Do not report prior learning credits in the student CDR for EDP students.

F. EDP Course/Section Identification

In the curricular CDR, EDP course sections must be identified with a code of 'E' for the data element Type of Instruction (DE 1100) and 'Y' for the data element Extended Degree Indicator (DE 1430).

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G. Duplicate Students and/or Course Sections

Data should be edited before it is submitted to eliminate duplicate students and duplicate course section numbers. Failure to do this will result in the loss of information. If duplicate student numbers are encountered in the CDR, the second record will be dropped.

H. Reporting Both EDP and Regular Course Section Activity in the Same Submission

If an EDP student is taking regular on-campus course work or a UW-Extension course and has EDP course work reported in the CDR from the previous six month period, the student's personal and university information [such as Student Classification (DE 2210) and Entrance Status, Current (DE 2240)] for the current semester should take precedence over the information from the previous EDP reporting period and, therefore, should be submitted on the CDR.

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I. Post-Term Data Requirements

CDR guidelines require that a post-term record be reported for every student listed in the sixth-week submission. Therefore, a post-term record should be included for EDP only students.

The data elements Degree Earned this Term (DE 2420), Major Associated with Degree Earned this Term (DE 2430), and Teacher Education Completion (DE 2440) for EDP students should be reported on the post-term student CDR during the semester awarded. Do not report degree or teacher certification data as part of the EDP information that is phased into a subsequent post-term student CDR submission.

The data elements Math Remediation Completed this Term (DE 2460) and English Remediation Completed this Term (DE 2465) should be included as part of the EDP student information reported in the subsequent post-term CDR submission.

Do not use data element Date of Withdrawal (DE 2500) for EDP students.