VOLUME I

Contents Part I

Introduction

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). Data elements dealing only with areas of curriculum, students, financial aid, and applications and admissions have been identified and placed in the dictionary. [Physical facilities were originally part of the CDR collection but are currently collected and maintained by Capital Planning.] 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, the collection is facilitated through the **Central Data Request (CDR)**. The CDR specifications are the means by which the core database is established 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 <u>CDR Specifications</u> and the <u>CDR Table Code Book</u>.

1) <u>CDR Specifications</u>: 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 <u>Introduction</u> 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, financial aid, and applications and admissions data areas. Each data element section is prefaced by an explanation of the configuration of data elements that constitute a logically complete record for that particular data area, such as data regarding an individual student, or an individual course, or course section. With this understanding of what constitutes a logically complete data record for a given data area, <u>the detailed specifications of each element</u> 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 purpose of the Data Submission Procedure section is to identify for each campus 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 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 during the year.

2) The CDR Table Code Book: This volume includes the accompanying CDR Table Code Book. Two of the coding systems in the CDR Code Book are maintained in cooperation with institutional 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. Sue Buth, Director of the Office of Policy Analysis and Research, is the CDR Administrator. She can be reach at (608) 262-1751 (sbuth@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.

DATA AREA	AREA MANAGER	PHONE # (area code 608)	EMAIL ADDRESS
Student (Academic Year and Summer)	Sue Buth	262-1751	sbuth@uwsa.edu
Financial Aid	Todd Bailey	263-3743	tbailey@uwsa.edu
Multiple Applications and Admissions Data (MAAD)	Dan Younan	890-3529	dyounan@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. Jennifer White, of the Office of Policy Analysis and Research, is the CDR Technical Coordinator. They can be reached at (608) 262-2623.

Code Table Manager

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

CDR CODE TABLE	TABLE MANAGER	PHONE # (area code 608)	EMAIL ADDRESS	
Degrees Table	Todd Bailey	263-3743	tbailey@uwsa.edu	
Majors Table	Todd Bailey	263-3743	tbailey@uwsa.edu	
Curricular Area Codes (CAC/UDDS)	Todd Bailey	263-3743	tbailey@uwsa.edu	
College Codes Table	Todd Bailey	263-3743	tbailey@uwsa.edu	
Address Table (city/state/zip/country)	Ting-Hsuan Hung	265-6776	thung@uwsa.edu	**Sp23**
High School Codes Table	Ting-Hsuan Hung	265-6776	thung@uwsa.edu	**Sp23**
CDR Dates Table	Jennifer White	262-2623	jwhite@uwsa.edu	
Cross-Listed Course Sections	Jennifer White	262-2623	jwhite@uwsa.edu	
Instructional Fund Table	Jennifer White	262-2623	jwhite@uwsa.edu	
Financial Aid Table	Todd Bailey	263-3743	tbailey@uwsa.edu	

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.

CENTRAL DATA REQUREST CAMPUS LIAISON PERSONNEL			
UW CAMPUS	**LIAISON / TITLE**	**PHONE #**	**EMAIL ADDRESS**
Madison	**Clare Huhn** Acad. Planning and Institutional Research	608-265-9276	clare.huhn@wisc.edu
Milwaukee	**James Hardy** Assessment and Institutional Research	414-229-6624	jhardy@uwm.edu
Eau Claire	**Kari Herbison** Institutional Research	715-836-3271	herbiskj@uwec.edu
Green Bay	**Samantha Surowiec** Institutional Research	920-465-2374	surowies@uwgb.edu
La Crosse	**Grace Engen** Institutional Research	608-785-8057	gengen@uwlax.edu
Oshkosh	**David Wahn** Institutional Research	920-424-2133	wahnd@uwosh.edu
Parkside	**Rhonda Kimmel** Registrar	262-595-2237	rhonda.kimmel@uwp.edu
Platteville	**John Dunning** Institutional Research, Strategy & Planning		dunningj@uwplatt.edu
River Falls	**Kelly Browning** Registrar	715-425-3342	kelly.browning@uwrf.edu
Stevens Point	**Marv Noltze** Institutional Planner	715-346-2748	mnoltze@uwsp.edu
Stout	**Frode Larsen** Planning, Assessment & Research	715-232-1443	larsenf@uwstout.edu	Sp23
Superior	**Emily Neumann** Institutional Research	715-394-8396/	eneuman2@uwsuper.edu
Whitewater	**Rebecca Jones** Institutional Research	262-472-1276	jonesrl@uww.edu	A23
UW Extended Campus	**Mark Mailloux** Data Manager	608-890-3390	mark.mailloux@uwex.edu

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Superior	**Emily Neumann** Institutional Research	715-394-8396/	eneuman2@uwsuper.edu
Whitewater	**Lynsey Schwabrow** **Rebecca Jones, Int.** Institutional Research	262-472-1801 262-472-1276	schwabrl@uww.edu / jonesrl@uww.edu
UW Extended Campus	**Mark Mailloux** Data Manager	608-890-3390	mark.mailloux@uwex.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.

<u>Schedule</u>

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.

<u>System Administration</u>

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.

<u>Institutions</u>

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. <u>Each liaison should respond to the Spring CDR update in writing, no later than July 15,</u> 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.

<u>CDR Code Table Handling</u>

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-

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

A.   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: a signatory commitment for payment of the fees, or finalized arrangements for third-party payment.

1.   Student Population

   a.   The following types of students should be included in the CDR submission:

      i.   Senior citizen auditors: students aged 60 and over who are exclusively auditing courses should be included in the CDR submission.

      ii.   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.   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 fourth-week 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 fourth-week files).

   The courses and credits on the CDR post-term student file should reflect all course activity that the student was enrolled in as of the end of the term, including courses added after the tenth day and courses from which the student withdrew after the tenth day in a manner that would be indicated on the student's transcript (e.g., a grade of withdrew).

Note: The CDR files submitted to System Administration reflect the "reality" that existed at the end of the tenth day of instruction. 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.

B.   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 fourth-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 fourth-week because of this flexibility.

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.

C.   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).