Census Date Approach

Last Revised: **09/23/2002**

DRAFT

REVISION CONTROL

Document Title:	CMS Census Date Approach
Author:	Cedar
File Reference:	CMS Census Date Approach 09232002.doc

Date	By	Action	Pages
09/23/2002	Todd McElroy	New Document	

Review/Approval History

Date	By	Action	Pages

Table of Contents

Page

Introduction

During a videoconference with the Institutional Research Directors of the pilot and close follower campuses on June 17, 2002, an issue was raised on how the census date is used in the ERS and APDB reports to extract student enrollment data. This document is intended to describe the proposed method and to document the approved approach.

PeopleSoft Capabilities

PeopleSoft stores enough information about when a student enrolls in a class, drops a class, receives a grade, etc. to allow for student enrollment levels to be calculated at any point in time – not just as of the current date.

Enrollment Record

When a student adds a class, an enrollment request record is created first. Edits are then run against this enrollment request and if passed, the enrollment is posted to the student's official *enrollment record* with the date that the add occurred. When a class is dropped, an enrollment request is first created, edits are run again and the status and drop date of the *enrollment record* are updated to reflect the drop. If the drop occurs early enough in the term, the enrollment record itself may be deleted – this is controlled by the campus setup.

By interrogating the add and drop dates of each the *enrollment record* a program can determine whether or not a student was "enrolled" in the class at a particular point in time, i.e. at census date.

Census Date

The census date for a class is stored in one of two places. For typical classes, the census date is setup in the definition of a Session. A "session" is a period of time, with a start and end date and classes are linked to sessions. In a given term, there can be many sessions. For example, many campuses will have a 16 week session, a first 8 weeks session, a second 8 weeks session, etc. The other place a class census date may be stored is in the Dynamic Dates area. Dynamic dates are used for classes that start and/or end at times that don't conform to a traditional session calendar(s). For example, a one-unit class that starts on the 3rd Saturday and runs for five Saturdays. A single class uses either the session census date or the dynamic dates census date.

Desired Approach

For ERS and APDB reporting, the desired strategy for reporting enrollment information is to look at the census date (either the session date or the class census date for dynamic date classes) for each class a student is enrolled. If the student were officially enrolled in that class as of the class census date then the enrollment would count. For example;

> Class 'x' census date = 09/20/02
> Class 'y' census date = 09/22/02

Transaction	Student A	Student B
Adds class 'x'	08/03/02	08/03/02
Adds class 'y'	08/15/02	09/30/02
Drops class 'x'	09/16/02	10/30/02
Drops class 'y'	11/07/02	11/07/02

When running the ERSS/s-ERSS or APDB Course Section report, student A's enrollment in class 'x' would *not* count because the drop occurred before the census date. Student A's enrollment in class 'y' would be reported because the add transaction occurred before census and the drop occurred after the census date.

For student 'B', the enrollment for class 'x' would count because the add transaction occurred before census and the drop occurred after census. However, student B's add of class 'y' would *not* count because the add transaction occurred *after* the census date.

Approval

The above approach of using the session census date and class census date (for dynamic date classes) fits the Executive Order that outlines the census date usage. Reference the Year Round Operations http://www.calstate.edu/YearRoundOps/ for details on the census date. A summary of this document, as it relates to the census date is contained in Appendix A of this document.

The baseline developed ERS and APDB extract reports use the strategy described above to report enrollments and enrollment levels.

This approach was affirmed during the 6/26/02 discussion with Phil Garcia of Academic Affairs and again at a follow-up meeting on 8/20/02.

Appendix A – Data Reporting Concepts and Definitions

Definitions of Term and Cutoff Date

TERM

A semester or quarter term is delimited by **cutoff dates**.

A session is considered to be part of a particular **term** for the assignment of FTE and the determination of state university fee limits, if its **census date** falls within the cutoff dates for that term.

CUTOFF DATE

Midnight on a cutoff date indicates the end of one **term** and the beginning of the next term for administrative and systemwide reporting purposes.

For all campuses, the **summer/fall cutoff date** is August 31. Thus, for these purposes August 31 is the last day of the summer term and September 1 is the first day of the fall term.

For all campuses, the **spring/summer cutoff date** is May 31.

Other cutoff dates (fall/spring or fall/winter and winter/spring) **may be set by the campus**.

	Fall Term	Winter Term	Spring Term		Summer Term
Sept 1	*Other Cutoffs TBD by the Campus*		*May 31*	*June 1*	*August 31*

Definitions of Types of Years and Sessions

SESSION

A period of instruction, usually 15 weeks for semester calendars and 10 weeks for quarter calendars.

A **term** may contain different sessions, which can be any length academically appropriate for the method of instruction and the units of credit.

Several campuses, for example, have adopted a summer term schedule that incorporates three sessions: sequential Sessions A and B, each running half of the summer term concurrent with Session C that runs the entire summer term. Each session may include one or more course sections.

ACADEMIC YEAR

A period of time beginning with the fall semester or quarter and ending with the spring semester or quarter of the regular sessions. The Academic Year does not include the summer term.

COLLEGE YEAR

A period of time beginning with the summer term and ending with the spring term of the regular sessions. The Academic Year plus the summer term, if any.

A college year contains either three semester **terms** (summer, fall and spring) or four-quarter **terms** (summer, fall, winter and spring).

REGULAR SESSIONS

The instructional program included in the summer, fall, winter and spring terms. It does not include Extension Programs.

SPECIAL SESSIONS

Executive Order #802 entitled, Special Sessions, was issued on January 31, 2002. This E.O. supercedes E.O. Nos. 166 and 466 and identifies the purpose of Special Sessions and their characteristics and requirements. It also identifies how Special Session programs and courses differ from state-supported summer programs and course offerings for matriculated students whenever they are offered during the college year at whatever time of year they are offered.

Definition of Census Date and How to Determine a Census Date for a Term

Each session within a term must have a **census date**.

CENSUS DATE

The date on which all reports included in the CSU - Enrollment Reporting System (ERS) must be based, unless specific exceptions are stated (AP 70-92, 11/23/70).

The point in an instructional **session** when students can no longer add classes, no longer receive full fee refunds, and no longer drop classes without special permission, and the date by which all fees have been paid or waived.

It is also the point at which official enrollment counts for the **term** are captured. For sessions that are equivalent in length to semesters or quarters, census dates are defined as the close of business on the 20th day of instruction in a semester and as the close of business on the 15th day of instruction in a quarter.

Data for a term is the **sum of all data tabulated at each session's census date** where that census date falls within the **cutoff dates** for the term.

Regular Sessions

SEMESTER CAMPUSES

The census date for the summer, fall, and spring **semesters** of the **regular sessions** shall be at the end of four weeks following the first date of instruction. The end of the fourth week is defined as the twentieth day of actual instruction, including Saturdays and Sundays if considered a normal day of instruction.

Fall term	Spring term	Summer term
Sem. Census: 20th day of instruction	Sem. Census: 20th day of instruction	Sem. Census: 20th day of instruction

QUARTER CAMPUSES

The census date for the summer, fall, winter, and spring **quarters** of the **regular sessions** shall be at the end of three weeks following the first date of instruction. The end of the third week is defined as the fifteenth day of actual instruction, including Saturdays and Sundays if considered a normal day of instruction.

Fall Term	Winter Term	Spring Term	Summer Term
Qtr. Census: 15th day of instruction	Qtr. Census: 15th day of instruction	Qtr. Census: 15th day of instruction	Qtr. Census: 15th day of instruction

Special Sessions

SEMESTER and QUARTER CAMPUSES:

Each special session must have a **census date**. The census date is **determined by the campus** to allow for the most efficient and effective data collection. The data from each special session will be included with the regular session data for the specific term or college year that is being reported.

A census date that is prior to the end of a special session will most likely yield a higher enrollment and FTE count than a census date that coincides with the completion of the session. Thus, the determination of a census date for a special session should be consistent with the campuses normal business practices; data capture capabilities and other processing requirements and limitations.

Data Reporting Due Dates

Reporting Due Dates (College Year 2001-2002)

The date on which all data are due to the Chancellor's Office in electronic form and without error. To provide campuses with some flexibility in the processing of **term** enrollment reporting data, **two student enrollment-reporting due-dates have been set for the college year** rather than specific dates for each campus or term. This permits campuses to capture enrollment data on census dates but to verify, reconcile, and certify much of the data with more flexibility.

First due-date

November 5 (summer term and fall term through census date): Federal and state **student enrollment** reporting mandates require that fall term enrollment data be collected annually no later than October 15 (for semester campuses) or fall quarter census date, and reported in error-free electronic formats along with summer term data no later than November 5 (three weeks after October 15). This requirement on its face appears to limit a campus' flexibility to meet student demand for shorter session courses during much of the remaining fall term. To remove this barrier, we will ask campuses to report full fall data (including enrollments reported above and those not reported above) with the second data submission described below.

The fall ERSS data file, with census dates captured between September 1 and October 15 and with data receipt on November 5, will be known as the **IPEDS/CPEC ERSS fall data file**. This file will be used in annual required federal and state fall reporting.

Second due-date

June 21 (full fall term, winter term, and spring term): No later than June 21 (three weeks after May 31), campuses should transmit error-free electronic state-supported ERSS data for: (0) the summer term, (1) the full fall term, (2) the winter term, and (3) the spring term. No later than June 21, campuses should also transmit error-free electronic continuing education for-credit ERSS data for all campus matriculants for: (0) summer term, (1) fall term, (2) winter term, and (3) spring term.

To maintain consistency among federal, state, and Trustee profiles about students, the fall IPEDS/CPEC ERSS data file will continue to be employed. All CSU published reports will clarify that the source of fall data.

While the full-term data files only are required for submission no later than June 21, campuses may elect to process and report term data by term. **Campuses may begin processing at their earliest convenience.**

Unanticipated reporting demands sometimes arise, and campuses may be asked to provide unedited, preliminary term files to enable the CSU to be responsive. The Chancellor's Office will provide campuses with as much warning as possible regarding the need for preliminary, unedited data.

In addition, it will continue to be necessary to provide the Chancellor's Office with hardcopy/paper reports at opening term, but these reports will primary focus on providing broad headcount and FTES reports and estimates for the current college year.