



**INDIANA COMMISSION** *for*  
**HIGHER EDUCATION**

**PMS IV – Student Persistence Incentive**

Instructions

2019-2021

## PMS IV – Student Persistence Incentive

### Overview:

Collects data necessary for the performance funding formula student persistence incentive metric.

### Who Reports:

All institutions except for Ball State University, Indiana University-Purdue University-Indianapolis, Indiana University-Bloomington, and Purdue University-West Lafayette

### What To Report:

For the last six fiscal years, report the number of degree-seeking undergraduate students reaching earned credit hour thresholds within established timeframes out of the number of students that started as first-time, Indiana resident, degree-seeking undergraduate students in the fall semester in years prior.

- The reporting year represents the established time limit for the student to reach the earned credit hour threshold.
  - Students at 2 Year institutions are measured on a 200% timeframe to reach credit hour thresholds. Thus, students starting in the fall semester 0, 1, 2 years prior to the reporting year are included for the Completed 15 Credit Hours, Completed 30 Credit Hours (2 YR), and Completed 45 Credit Hours categories, respectively.
    - For 2 year institutions, each reporting year will report :
      - the cohort for that year and their completion of the 15 credit threshold
      - the cohort for the prior year and their completion of the 30 credit threshold
      - the cohort for two years prior and their completion of the 45 credit threshold
    - Students at 4 Year institutions are measured on a 100% timeframe to reach the credit hour thresholds. Thus, students starting in the fall semester 0, 1, 2 years prior to the reporting year are included for the 30 Credit Hours (4 YR), 60 Credit Hours, and 90 Credit Hours categories, respectively.
      - For 4 year institutions, each reporting year will report :
        - the cohort for that year and their completion of the 30 credit threshold
        - the cohort for the prior year and their completion of the 60 credit threshold
        - the cohort for two years prior and their completion of the 90 credit threshold

- The reporting year will be reflective of the academic year timeframe. Thus, students will have through the end of the trailing summer of an academic year to hit credit thresholds (see more information in the instructions below).
- Residency status should be based on the residency during the fall semester that they entered as a first-time student. This should only include resident students and not those attending college through reciprocity agreements.
- Undergraduate degree-seeking status should be based on during the fall semester that they entered as a first-time student.
- The metric will account for those accepted credit hours associated with dual credit and transfer credits that a student obtained prior to entering the institution/campus. However, a student who transfers in credits must hit the credit threshold by earning additional credits at the reporting institution (e.g., a student cannot transfer in 15 credit hours and be counted in the “successfully completed 15 credit hours” category. A student could transfer in 12 credit hours and earn 3 at the reporting institution and be counted in the “successfully completed 15 credit hours” category).
- For a student to be considered as hitting the threshold the following must hold:
  - Student must be a degree-seeking undergraduate student at the time they hit the threshold.
  - Students must complete the threshold by the end of the reporting year or the trailing summer term of the academic year associated with the applicable 100%/200% threshold. E.g., for a 2-year student in 2016-2017, a student would need to hit the threshold by the end of the trailing summer term of the 2016-2017 academic year.

### Form Validation:

- Data entered must be a non-negative whole number
- Number of students hitting the threshold has to be less than or equal to the number of students entering as first-time (e.g., the persistence rate cannot be greater than 100%)

### ICHE Prepopulation Logic:

The rules for the persistence metric changed for the 2019-2021 biennium; the metric is now rate-based instead of count-based. As such, whenever possible (see note below), the full six years of data were prepopulated using the credits file using the fields and prepopulated logic outlined below.

**Note:** *ICHE did not begin collecting cumulative credits earned (academic year) data until the 2012 reporting year. Thus, data were not prepopulated for certain years and credit thresholds because credit taking behavior could not be accurately assessed in a student’s first 1-2 years on campus in some cases. In these cases, schedule data were left blank; **Institutions must provide the missing data points as a part of the budget request process.***

Source: Credits File (CR)

Field ID	Data Element	Use
CR01	Reporting Year	Used to determine in which year a semester occurred in
CR03	Student Identifier	Used to link data to SP file; Used to ensure that a student is only counted once in each credit threshold that they hit.
CR04	Semester	Used to identify semesters
CR05	Student Entry Type	Used to determine first-time entry status
CR08	Student Residency Status	Used to determine residency status; Only records with a code value of 1 (“Indiana resident paying resident tuition”) are included
CR07	Degree Level	Used to include only semester data in which student was considered to be a degree-seeking undergraduate student. The following codes are considered a “degree-seeking undergraduate”  01=Awards of <1 academic year 02=Awards of at least 1 but less than 2 academic Years 03=Associate 05=Bachelor’s 21=Unclassified Undergraduate
CR25	Total Credit Hours Earned	Used to determine whether student reached credit threshold
CR45	Total Cumulative Credits Earned (Academic Career)	Used to determine whether student reached credit threshold

Source: Student Profile File (SP)

The student profile data (name, DOB, etc.) is used to link data longitudinally (e.g., across multiple years). This is needed as the data necessary for this metric spans multiple years.

## Business Logic

### **General Description:**

For a single reporting year:

#### Category I: 15 Credit Hours (2 Year Institutions) / 30 Credit Hours (4 Year Institutions)

- Select the beginning cohort (fall, first-time, resident, degree-seeking undergraduate students)
- Determine the number of hours each student had prior to the start of each semester between a student's entry fall semester and semesters through the end of the reporting year (measured through total cumulative earned hours minus total term earned hours).
- Determine the number of hours earned at the end of each semester between a student's entry fall semester and semesters through the end of the reporting year (measured through total cumulative earned hours).
- If the student in a term by the end of the reporting year 1) had less than 15/30 hours as the beginning hours and 2) had 15/30 or more as the total cumulative hours and 3) was seeking a degree, the student is counted as meeting the 15/30 credit hour threshold.

#### Category II: 30 Credit Hours (2 Year Institutions) / 60 Credit Hours (4 Year Institutions)

- Select the beginning cohort for the prior reporting year (prior fall, first-time, resident, degree-seeking undergraduate students)
- Determine the number of hours each student had prior to the start of each semester between a student's entry fall semester and semesters through the end of the reporting year (measured through total cumulative earned hours minus total term earned hours).
- Determine the number of hours earned at the end of each semester between a student's entry fall semester and semesters through the end of the reporting year and was also reported as a degree-seeking student in that term (measured through total cumulative earned hours).
- If the student in a term by the end of the reporting year 1) had less than 30/60 hours as the beginning hours and 2) had 30/60 or more as the total cumulative hours and 3) was seeking a degree, the student is counted as meeting the 30/60 credit hour threshold.

#### Category III: 45 Credit Hours (2 Year Institutions) / 90 Credit Hours (4 Year Institutions)

- Select the beginning cohort for two years prior to the reporting year (two prior falls ago, first-time, resident, degree-seeking undergraduate students)
- Determine the number of hours each student had prior to the start of each semester between a student's entry fall semester and semesters through the end of

the reporting year (measured through total cumulative earned hours minus total term earned hours).

- Determine the number of hours earned at the end of each semester between a student's entry fall semester and semesters through the end of the reporting year (measured through total cumulative earned hours).
- If the student in a term by the end of the reporting year 1) had less than 45/90 hours as the beginning hours and 2) had 45/90 or more as the total cumulative hours and 3) was seeking a degree, the student is counted as meeting the 45/90 credit hour threshold.

### Step 1:

Identify students entering in the fall semester of the appropriate year as first-time, degree-seeking undergraduate resident students

- A) Filter credit data (CR) using the following:
  - a. Use reporting year field (CR01) to include data only appropriate for the given reporting year
    - i. For the 2 Year Institutions, include students starting in the fall semester 0, 1, 2 academic years prior to the reporting year for the Completed 15 Credit Hours, Completed 30 Credit Hours (2 YR), and Completed 45 Credit Hours categories, respectively.
    - ii. For the 4 Year Institutions, include students starting in the fall semester 0, 1, 2 academic years prior to the reporting year for the Completed 30 Credit Hours (4 YR), Completed 60 Credit Hours, and Completed 90 Credit Hours categories, respectively.
  - b. Use semester field (CR04) to filter only fall semester records
  - c. Use the entry type field (CR05) to filter only first-time students
  - d. Use the degree level field (CR07) to filter the appropriate degree level to only degree-seeking undergraduate records.
  - e. Use residency status field (CR08) to only include students who were reported as an Indiana resident in their first semester.
- B) Using the filtered data from step 1 (A), create a distinct set of first-time degree-seeking undergraduate resident students entering in the appropriate year for the reporting year for each credit threshold category. [**First-time dataset**]

### Step 2:

Determine whether the students in the **First-time dataset** hit the credit threshold in the established timeframe.

- A) Filter credit data (CR) using the following:
  - a. Use the reporting year field (CR01) to include only semesters that occurred during the applicable academic years outlined in 1(A).

- b. Use the degree level field (CR07) to include only semesters that the student was considered a degree-seeking undergraduate.
- B) For the filtered credit data in step 2 (A) and each applicable credit threshold, identify students who meet the credit threshold using the student identifier field (CR03). To determine whether a threshold was met, the total semester credit hours earned field (CR25) and total cumulative credits earned (academic year) (CR45) fields are used. In order to meet the threshold, three conditions must occur:
  - a. **Student is below the threshold at the beginning of the semester:** To approximate this value, total semester credit hours earned (CR25) are subtracted from total cumulative credits earned (CR45). E.g., if a student's semester record data indicated that a student earned 9 credits in the given semester, and had a total cumulative credits earned (academic year) of 23 credits at the end of the semester, then the students' estimated credits earned at the beginning of the semester would be 14 (23-9) and they would be considered "below threshold" for all of the persistence categories (15, 30, and 45 for 2 year institutions and 30, 60, 90 for four-year institutions)
  - b. **Student is at or above threshold at the end of the semester:** Total cumulative credits earned (CR45) data are used to determine this. Continuing with the example above, the student's end of semester earned credits would be 23; thus, the student would be counted in the "Completed 15 credit hours category (they started the semester below 15 (14 credits) and end the semester above 15 (23 credits)).
  - c. **Student must meet threshold within timeframe allotted:** student must be recorded meeting the threshold by the end of the last trailing summer term in the academic year associated with the reporting year in the budget schedule.
- C) Using the filtered data from step 2 (B), create a distinct set of students meeting the threshold by the last semester of the reporting year. [**Threshold Completer Dataset**]
- D) Merge the **First-time dataset** from step 1 (B) with the Threshold Completer dataset from step 2 (C). This will create a distinct set of students that met the threshold [**Met Threshold Dataset**]

### Step 3:

From the **First-time Dataset** created in step 1 (B), count the distinct number of students. This number is entered in the "Students Entering as First Time, Degree Seeking Undergraduates" section of the schedule.

### Step 4:

From the **Met Threshold Set** created in step 2 (D), count the distinct number of students. This number is entered in the "Students Completing within xxx% Time" section of the schedule.

### Data Audit Requirements:

A reason must be provided for every ICHE prepopulated value that is updated.

### Document Change History:

2018	Changed to incorporate a rate-based metric and to include a 90 credit hour benchmark
	<b>Start of 2019-2021 biennium data collection</b>
2016	No Changes
	<b>Start of 2017-2019 biennium data collection</b>
2014	Created layout
	<b>Start of 2015-2017 biennium data collection</b>