

# StudentTracker® for Systems of Institutions User Manual

**DECEMBER 1, 2023** 



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# ${\bf StudentTracker}^{\tiny{\textcircled{\$}}} \ for \ {\bf Systems} \ of \ {\bf Institutions} \ {\bf User} \ {\bf Manual}$

December 2023

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This guide may occasionally be updated to reflect changes in the product. For the latest version, contact us at: <a href="mailto:StudentTracker@StudentClearinghouse.org">StudentTracker@StudentClearinghouse.org</a>



# **Background**

#### What is StudentTracker?

StudentTracker® is the only nationwide source of college enrollment and degree data. More than 3,600 colleges and universities — enrolling 98 percent of all students in public and private U.S. institutions — regularly provide enrollment and graduation data to the Clearinghouse. Through StudentTracker, you can query our participating institutions' student data to perform all types of educational research and analyses — quickly, easily and affordably.

# **How Can StudentTracker Help You?**

You can use StudentTracker to:

- Identify enrollment trends and patterns
- Track transfer student enrollment nationwide
- Improve your ability to target, recruit, and retain students
- Fulfill federal reporting requirements
- Verify and correct cohort default rates
- Determine a student's financial need level
- Plan curriculum modifications and institutional alliances
- Conduct academic assessments
- Identify students who are concurrently enrolled
- Perform accurate longitudinal and other outcome analyses



# Access to StudentTracker

For full access to StudentTracker, two different accounts are required: an individual Web ID account and a shared FTP account. This guide covers how each account is relevant to the StudentTracker process.

Your level of access to Web ID and FTP accounts is decided and managed by your system's User Administrator. Please contact us at <a href="mailto:StudentTracker@StudentClearinghouse.org">StudentTracker@StudentClearinghouse.org</a> or 703-742-4211 for your User Administrator's contact information.

#### Web ID

Access: User Login at www.StudentClearinghouse.org



The Web ID account is used to track and review file submissions and update your contact information. User Administrators have the additional functionality of managing access. **The Web ID is an individual account that only you should have access to.** 

#### **Track File Submissions**

To track the status of the files you submitted, follow the File Status instructions.

A Web ID with full functionality to complement the Batch Query File process would be set with the following **roles**:

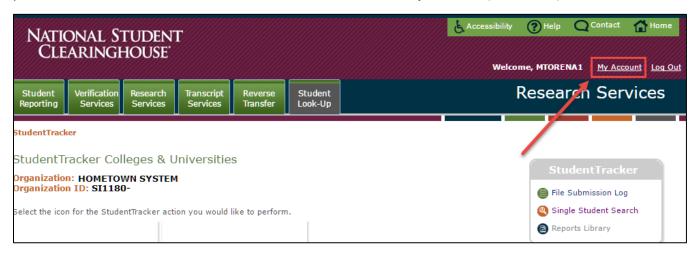
- FTP: User will receive email notification for each file submitted and each set of reports ready to download from FTP
- ST Reports: User will receive email notification when reports ready to download from FTP



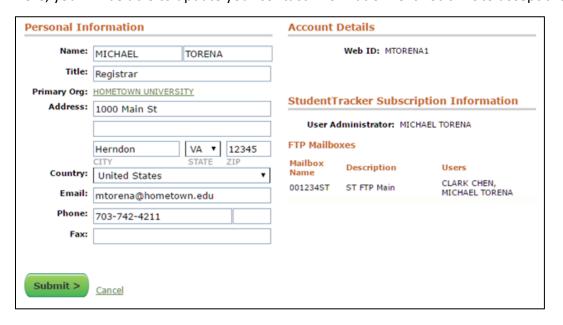
• **ST Submissions**: User will receive email notifications regarding **Validation Status** of files. User will also have access to **File Submissions Log** to review status of files

### **Update Contact Information**

To update your contact information, go to <u>www.StudentClearinghouse.org</u>, and click **User Login.** Log in with your Web ID, click the **Research Services** tab, and then click **My Account** (see below).



Here, you will be able to update your contact information. Click **Submit** to accept the updates.



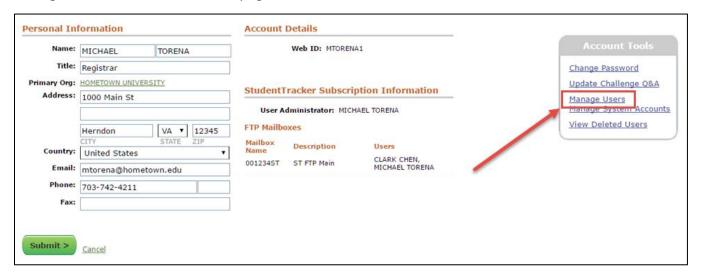
#### **Password Reset**

Please request password resets from your User Administrator.



# **Account Management (User Administrators Only)**

To manage user access, go to <u>www.StudentClearinghouse.org</u>, click **User Login** and log in with your Web ID. Click the **Research Services** tab, then click **My Account**. Click **Manage Users** (see below), then click **I Accept** through the Terms and Conditions page.

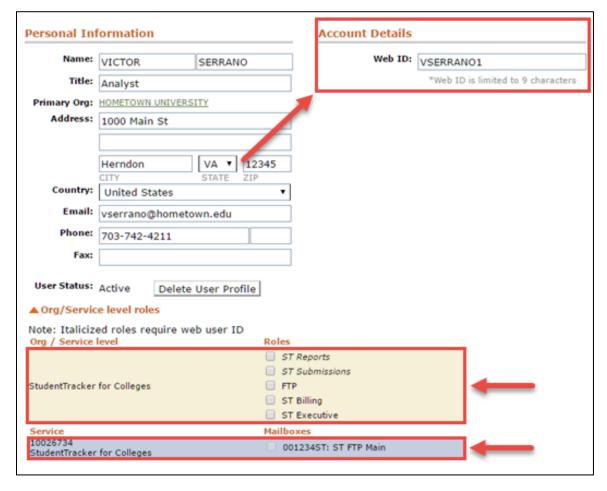


Here, you will see a list of users who currently have access to StudentTracker. **To add users**, click **Add a New User**. **To edit a user's profile**, click the user's name.



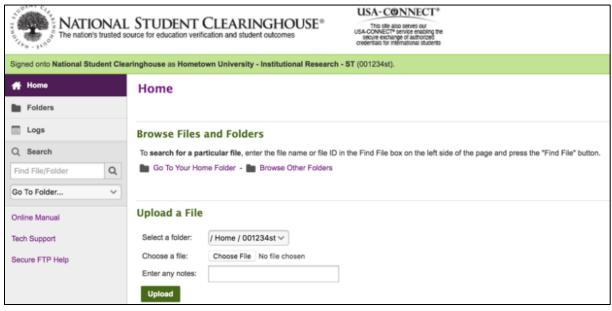
In a new or existing user profile, you can set **roles** and **FTP accounts** for the user and reset their Web ID password.





#### **FTP**

Access: FTP Login at www.StudentClearinghouse.org (which takes you to the page shown below).





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The FTP account is used to submit Batch Query Files to us and to download reports we return to you. **This is a shared account.** 

Each time a file is submitted to us, and each time reports are returned, all users with the **FTP role** will receive an email notification from the FTP account to which they are assigned.

If you would like to request an FTP account, send us an email at StudentTracker@StudentClearinghouse.org.

If you require a password reset for an FTP account, send us an email at

StudentTracker@StudentClearinghouse.org.

**Note:** After you log in to your FTP account, you may be asked to install the Upload/Download Wizard. We strongly recommend you disable the Wizard as it is not always reliable in transmitting data. If you would like to use the Wizard, please note that it only works in Internet Explorer.



# **How to Request Student Data**

#### **Batch File Submission**

You can query your students' enrollment data by submitting a Batch Query File to us. A Batch Query File is an Excel spreadsheet formatted to our system's required specifications that contains the students who you want to query. Our system returns a set of reports to you for every file you submit to us.

Note: For more information, see the File Formatting and Submission Guide.

The steps for performing a batch file submission are as follows:

#### Step 1: Choose a Search Option

 Using the Search Option Guide, choose a search option and search begin date that best fits your search scenario.

#### Step 2: Create Your Batch Query File

- Using Microsoft Excel, create a batch query file containing the students you want to search.
- Refer to the **File Formatting and Submission Guide** for file formatting requirements and instructions.

### Step 3: Submit Your Batch Query File

- Once your file is complete, upload it to us via your FTP account.
- Refer to the File Formatting and Submission Guide for instructions on how to submit your file.

#### Step 4: File Runs Through Validations

- Once we receive your file, our system will run it through validations. If it passes validations, reports are generated.
- Refer to the <u>File Status and Validations</u> section of this guide for details on this step, including emails notifications.

#### Step 5: Retrieve Your Reports

- Our system returns reports to the same FTP account you uploaded your file from.
- Refer to the File Formatting and Submission Guide for instructions on how to retrieve reports.
- For additional information reports, refer to the Reports section of this guide.



### **File Status and Validations**

StudentTracker instantly returns feedback via automated email notifications to users with the **ST Submissions** role, which is based on the formatting integrity of the Batch Query Files you submit to us. You can also check the processing status of each of these files within the **Submitted Files Log** of the StudentTracker online interface.

When you submit a file to us, our system will run it through two levels of validation:

1. **Structural**: Checks for errors in your file name, layout, and formatting

**Note:** Files that fail structural validations will be rejected and will need to be corrected and resubmitted. You will receive an email notification with each specific structural error, as well as how to correct it.

2. Field Level: Checks for errors and possible data issues in your Student Detail Rows

**Note:** Files that fail field level validation will be rejected and will need to be corrected and resubmitted. You will receive an email notification with each specific field level error, as well as how to correct it. **Some** field level validations are completed automatically by the Clearinghouse system and will be noted in your file's **Validation Results**.

#### **File Validation Emails**

For each file you submit to us, our system will send users with the **ST Submissions** role an email advising you if the file passed or failed structural and/or field level validations (example below). Review each of these emails closely, as some may require you to take action on your submitted file.

File Validation emails are sent from **STAuto-Notify@StudentClearinghouse.org**. Do not respond to these emails, as they are auto-generated.

Below are two sample File Validation emails, Accepted File (top) and Rejected File (bottom).



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Thu 6/30/2016 1:08 PM

STauto-notify@studentclearinghouse.org

StudentTracker File Unable to Load for Organization ID 001234-00

The National Student Clearinghouse has received your StudentTracker file, but cannot accept it because of the structural error described below. Structural errors prevent the submission from loading to the Clearinghouse system. Please correct your file and resubmit it.

SPR2005\_COHORT1.txt FILE NAME:

INQUIRY/SEARCH

TYPE:

SUBMISSION DATE: 06/30/2016 SUBMISSION ID: 250968 FTP MAILBOX: 001234ST

STRUCTURAL ERROR: File format is not valid.

All student detail rows must begin with D1. Correct any rows that do not CORRECTION:

begin with D1 and resubmit.

For your convenience you can access the File Formatting & Submission Guide here.

\*\*\* Please do not reply to this email.\*\*\*

If you have questions or need assistance, please contact studenttracker@studentclearinghouse.org .

National Student Clearinghouse www.studentclearinghouse.org



STauto-notify@studentclearinghouse.org

StudentTracker File Accepted for Organization ID 001234-00

The National Student Clearinghouse has received your StudentTracker file referenced below. We are pleased to report that your file submission has been validated and accepted. Your StudentTracker reports will be made available to you within 3-5 business days\*. We will send an email to your FTP contacts when the reports are in your FTP mailbox.

FILE NAME: SPR2005\_COHORT2.txt

NUMBER OF RECORDS: 15 INQUIRY/SEARCH TYPE: SE SUBMISSION DATE: 06/30/2016 SUBMISSION ID: 250966 FTP MAILBOX: 001234ST CONTRACT END DATE: 01/01/2022

SUBMISSION STATUS: Field validation passed

\*\*\* Please do not reply to this email.\*\*\*

If you have questions or need assistance, please contact studenttracker@studentclearinghouse.org

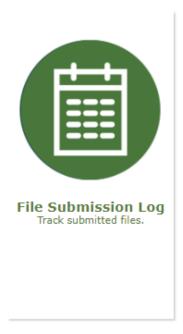
National Student Clearinghouse www.studentclearinghouse.org

\*If your contract end date is in the past, we cannot release your reports. To reactivate your subscription and to obtain information on invoices and payments, please reach out to your billing contact: CLARK CHEN.



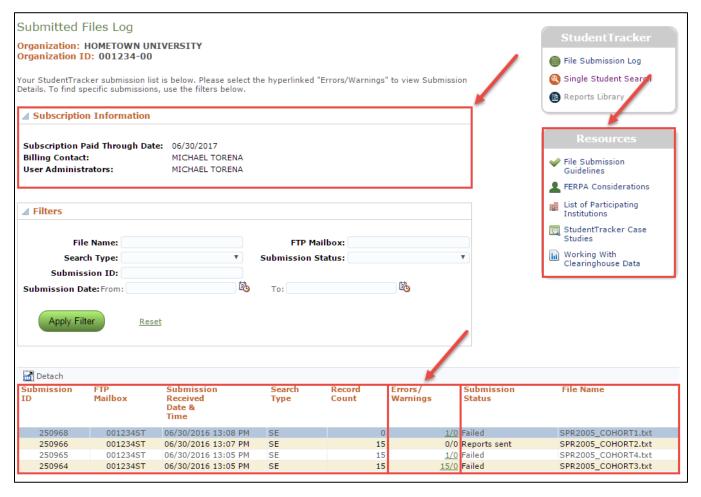
#### File Status

The StudentTracker user interface allows you to review the Errors and Warnings for each file you submitted. To access the interface, go to <a href="www.StudentClearinghouse.org">www.StudentClearinghouse.org</a>, click User Login, log in with your Web ID, click the Research Services tab, then click File Submission Log (see below). For additional assistance logging in with your Web ID, see our tutorial at <a href="https://clearinghouseacademy.org/how-to-login-to-the-secure-and-the-ftp-sites/">https://clearinghouseacademy.org/how-to-login-to-the-secure-and-the-ftp-sites/</a>.



After you click File Submission Log, you will see a list of files you have submitted to us, including their details such as file name, file submission date, etc. (see below).





This page also displays your system's **Subscription Information**, including when your subscription expires, your system's billing contact (the individual with the **ST Billing** role), and your system's user administrator (the individual with the **User Administrator** role).

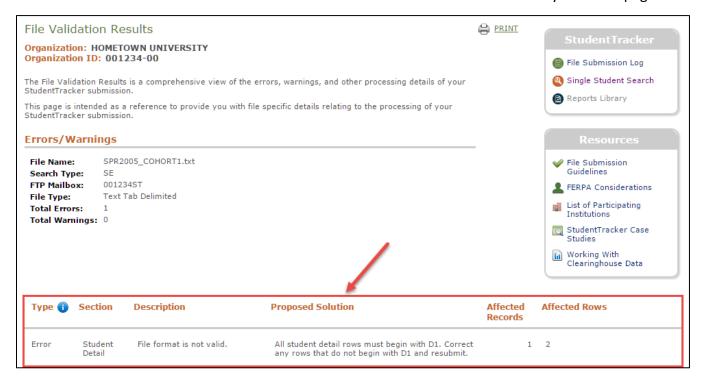
Use **Filters** by entering information in the applicable fields and clicking **Apply** or by clicking **Reset** to see all files or to review details on specific files. Each file will have one of the following statuses:

Status	Definition
In Process/In Progress	System is running file through validations.
Passed	File passed both structural and field-level validations. No further action is needed. Reports will be generated.
Passed with Warnings	System auto-populated or auto-corrected fields. No further action is needed. Reports will be generated.
Failed	File contains errors that must be corrected. Click its Errors / Warnings number for specifics.



#### **File Validation Results**

If your file is in **Passed with Warnings** or **Failed** status, click the **Errors/Warnings** link to the right of the file's **Submission ID** to access its validation results. File Validation Emails will also direct you to this page.



The **File Validation Results** page will show you what Errors and Warnings exist in your file, where they are located in your file, and proposed solutions to resolve them.

All Errors must be corrected, while Warnings are informational in nature and include small formatting issues that the Clearinghouse system automatically corrects for your convenience.



# **Matching**

When your file passes all validations, our system will send the student records in your file to the Clearinghouse's matching service. When this occurs, the Submission Status for your file in your Submitted Files Log displays as **Matching**.

#### **How Matches Are Made**

When our system performs matching, it takes the information you entered on each student and looks for matching records in our enrollment database before or after the student's Search Begin Date (this depends on the **Search Option** you choose).

For example, if you perform a Subsequent Enrollment query on John A Smith, born January 1, 1990, with a Search Begin Date of September 15, 2008, our system will return all term records it can locate for John A Smith, born January 1, 1990, with a **Term End Date of September 15, 2008 or later** (for degree records, a **Degree Award Date of September 15, 2008 or later**).

Note: For additional information on Search Options, review the File Formatting and Submission Guide.

Records are not returned if the student's information has a directory (FERPA) block, if the student's information has not been submitted by the reporting institution, or if our system cannot locate any matching records within your search range.

# **Data Quality**

The information in our enrollment database contains records for 98 percent of all postsecondary students in the United States. Information from most institutions is provided to us on a monthly basis. When performing queries, be mindful of the timing that you perform your query. You will want to give reporting institutions time to submit and correct their data.

If you perform queries by semester, we recommend performing them during the following times to make sure that you capture the most available data possible:

Spring Semester: Mid-April
 Summer Semester: Mid-August
 Fall Semester: Mid-November

# **Updated Matching using Students' Lived Name**

The National Student Clearinghouse started allowing the submission of Lived Name data elements in December 2023. A student's lived (or preferred name) is a self-chosen persona and/or preferred professional name. This name is separate from the legal name and is used as a fundamental component of the student's identify.



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StudentTracker users now have the ability to include any version of a student's name (Lived or Legal) in their batch query request file and have that name matched to Clearinghouse records. The StudentTracker application will return whichever name was initially included on the request file in the student detail report, even if some records were matched under a different name. StudentTracker will not identify if the records returned in a detail report were matched on a lived or legal name.



# **Reports**

For each Batch Query File you submit to us, we return the three following StudentTracker reports:

- 1. Control Report
- 2. Aggregate Report (if DA, PA, or SE query) or Cohort Report (if CO query)
- 3. Detail Report

Reports are returned to the same FTP account from which you submitted your file. For instructions on retrieving reports, please see the **File Formatting and Submission Guide**.

**Note:** Our reports are designed to provide you with a clear understanding of the batch queries you submitted to us. For more information on how to interpret the information in your reports, please see the report definitions.

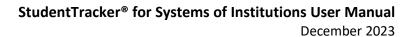
### **Control Report**

File Name Format: Sending FTP Account\_Submission ID\_CNTLRPT\_Search Option\_Date and Time\_Batch Query File Name.txt

(e.g., 001234ST\_250966\_CNTLRPT\_SE\_06302016120000\_SPR2005\_COHORT2.TXT)

The Control Report provides an overview of your search results. The bottom lists postsecondary institutions with over 1,000 students that do not participate in the Clearinghouse's Enrollment Reporting service. We cannot return any enrollment data for students attending these institutions.

Date: 06/30/2016			
etilbei	NATIONAL STUDENT CLEA		PLIMMADY
STUDE			SUMMART
	FOR HOMETOWN UNIVERSI	,	
	SUBMISSION ID # 2	50966	
FILE NAME:		S	SPR2005 COHORT2.TXT
FILE CREATION DATE	:		06/15/2016
QUERY/SEARCH TYP	E:	Su	bsequent Enrollment (SE)
TOTAL STUDENTS IN	YOUR STUDENTTRACKER REQUES	ST FILE:	15
	ITH NO RESPONSE DATA AVAILABL		15
	OUND AND INCLUDED IN AGGREGA	<del>_</del> -	14
	lays initial enrollment records only)	TE REFORT.	14
	ITH AT LEAST 1 RECORD FOUND FO	OR DETAIL REPORT	- 14
TOTAL GIGBLING III	nts with partially blocked records)	on bemiener on	
RECORDS BLOCKED	ON DETAIL REPORT		
	<u>ON DETAIL REPORT</u> ITH INITIAL TERM ENROLLMENT/DE	ODEE DECORDO DI	OCKED: 0
	ITH INITIAL TERM ENROLLMENT/DE		-
	ITH COMPLETE ENROLLMENT/DEG		
* DEGREEVERIEY PAI		KLL HSHOKT BLOC	Yes
** ADDITIONAL DATA			Yes
, and the second second			
More than 3,600 colle institutions, participate	ges and universities, enrolling over 9 in the Clearinghouse.	8% of all students in	n public and private U.S.
StudentTracker reports colleges with 1,000 or n	eport attendance and completion data or student-level detail file. To help you nore students that do not report attenda e-mail us at studenttracker@studentcle	uidentify these institution of	tions, below is a list of the
School Code	School Name		Enrollment Size
009999-00	BLUE LAKE UNIVERSITY		1500
009990-00	GREENFIELD COMMUNITY COLLE	GE	1250





Here is a description of each of the rows of information on the Control Report:

Row Description	Definition
TOTAL STUDENTS IN YOUR STUDENTTRACKER REQUEST FILE	Total number of student records from the file. Each row in the request file beginning with "D1" is considered a student record.
TOTAL STUDENTS WITH NO RESPONSE DATA AVAILABLE	Total number of students for whom the Clearinghouse cannot return any enrollment or degree information. Information may not be returned for the following reasons: 1) the student attended a school that does not report enrollment or degree information to the Clearinghouse; 2) the records in the Clearinghouse database are not within the search date parameters; 3) the student did not match to any records in the Clearinghouse database.
TOTAL STUDENTS FOUND AND INCLUDED IN THE AGGREGATE REPORT	The Record Found indicator on the detail report will = N for these students.  Total number of students that have matched to a student in the Clearinghouse's database and who has records that meet the search date parameters.
	TOTAL STUDENTS IN YOUR STUDENTTRACKER REQUEST FILE  - TOTAL STUDENTS WITH NO RESPONSE DATA AVAILABLE  = TOTAL STUDENTS FOUND AND INCLUDED IN THE AGGREGATE REPORT
	For CO, DA, SB, SE queries, the student must have an enrollment record with a term end date that is after the search date, or a degree record with an award date that is after the search date.
	For PA queries, the student must have an enrollment record with a term end date prior to the search date, or a degree record with an award date prior to the search date.
TOTAL STUDENTS WITH AT LEAST 1 RECORD FOUND FOR DETAIL REPORT	Total number of students that have matched to a student in the Clearinghouse's database, who have records that meet the search date parameters and for whom the Clearinghouse can report some or all enrollment or degree information.
	TOTAL STUDENTS FOUND AND INCLUDED IN THE AGGREGATE REPORT  - TOTAL STUDENTS WITH COMPLETE ENROLLMENT /DEGREE HISTORY BLOCKED  = TOTAL STUDENTS WITH AT LEAST 1 RECORD FOUND FOR DETAIL REPORT
	The Record Found indicator on the detail report will = Y for these students.
TOTAL STUDENTS WITH INITIAL ENROLLMENT OR DEGREE RECORDS BLOCKED	Total students that have matched to a student in the Clearinghouse's database and met the search date parameters, but the student's initial record as explained above is blocked. When the record is blocked, the student is counted on the Aggregate Report, but you will not be able to see the records on the Detail Report. Therefore, you will not be able to determine how long the student went to this school or whether the student received a degree from this school.
TOTAL STUDENTS WITH PARTIALLY BLOCKED ENROLLMENT/DEGREE RECORDS	Total students that have matched to a student in the Clearinghouse's database and met the search date parameters, but the student has records at more than one school, possibly with multiple branches, and some of these records are blocked.
	The Record Found indicator for the student in Detail Report will = Y, but a complete enrollment or degree history will not display.



Row Description	Definition
TOTAL STUDENTS WITH COMPLETE ENROLLMENT / DEGREE HISTORY BLOCKED	Total number of students that have matched to a student in the Clearinghouse's database and met the search date parameters but for whom the Clearinghouse cannot report any enrollment or degree information on the Detail Report because all of the student's records (from all schools attended) are blocked*.
	The Record Found indicator on the detail report will = N.

### **Aggregate Report**

(DA, PA, and SE queries ONLY)

File Name Format: Sending FTP Account\_Submission ID\_AGGRPT\_Search Option\_Date and Time\_Batch Query File Name.csv

(e.g., 001234ST\_250966\_AGGRPT\_SE\_06302016120000\_SPR2005\_COHORT2.CSV)

The Aggregate Report (generated for DA, PA, and SE queries) provides the most commonly attended institutions, based on the Search Begin Date provided. The numbers included only contain information on a student's **initial** enrollment and **initial degree.** Additional detailed information regarding each student's enrollment history can be found in the detail report. This number is aggregate and includes counts of all students that matched and meet the search date criteria, even though the student records may be blocked.

**For DA and SE queries,** the record must have a term end date that is greater than the search date. Initial enrollment is then determined by earliest term begin date. The initial school is considered to be the school with the latest enrollment. **For PA queries,** the record must have a term end date that is earlier than the search date. Initial enrollment is then determined by the latest term begin date.

**For CO queries, a Cohort Report is generated in place of an Aggregate Report.** Details on the Cohort Report can be found at <a href="http://studentclearinghouse.info/onestop/wp-content/uploads/ST">http://studentclearinghouse.info/onestop/wp-content/uploads/ST</a> CohortQueryGuide.pdf.

Date: 06/30/2016 NATIONAL STUDENT CLEARINGHOUSE STUDENTTRACKER AGGREGATE REPORT : ANALYSIS OF INITIAL TRANSFERS FOR HOMETOWN UNIVERSITY (001234-00) SUBMISSION ID # 250966										
FILE NAME: SPR2005_COHORT2.TXT FILE CREATION DATE: 06/15/2016										
QUERY/SEARCH TYPE: Subsequent Enrollment (SE)										
SCHOOL CODE	SCHOOL NAME	SCHOOL TYPE	PUBLIC / PRIVATE	STATE	% STUDENTS	# STUDENTS ID'D AT INITIAL SCHL	# STUDENTS INTIAL SCHL BLOCKED	# STUDENTS INTIAL SCHL DETAIL RPT	# STUDENTS AWARDED DEG THIS SCHL	# STUDENTS AWARDED DEG LATER SCHLS
			PRIVATE	STATE CA		ID'D AT INITIAL	INTIAL SCHL	INTIAL SCHL	AWARDED	
CODE	NAME	TYPE	PRIVATE Public		STUDENTS	ID'D AT INITIAL SCHL	INTIAL SCHL BLOCKED	INTIAL SCHL DETAIL RPT	AWARDED DEG THIS SCHL	AWARDED DEG LATER SCHLS
000123-00	NAME RAFFLES UNIV	TYPE 4	PRIVATE Public Public	CA	STUDENTS 42.86%	ID'D AT INITIAL SCHL	INTIAL SCHL BLOCKED 0	INTIAL SCHL DETAIL RPT	AWARDED DEG THIS SCHL 2	AWARDED DEG LATER SCHLS
CODE 000123-00 000456-00 000789-00	NAME RAFFLES UNIV CLARKE UNIV	TYPE 4	PRIVATE Public Public Public	CA CA	STUDENTS 42.86% 28.57%	ID'D AT INITIAL SCHL	INTIAL SCHL BLOCKED 0	INTIAL SCHL DETAIL RPT	AWARDED DEG THIS SCHL 2	AWARDED DEG LATER SCHLS
CODE 000123-00 000456-00 000789-00	RAFFLES UNIV CLARKE UNIV RAFFLES CC	4 4 2	PRIVATE Public Public Public Private	CA CA CA	42.86% 28.57% 7.14%	ID'D AT INITIAL SCHL	INTIAL SCHL BLOCKED 0 0	INTIAL SCHL DETAIL RPT	AWARDED DEG THIS SCHL 2	AWARDED DEG LATER SCHLS 5 0
CODE 000123-00 000456-00 000789-00 001235-00	NAME RAFFLES UNIV CLARKE UNIV RAFFLES CC BEACH ACAD	4 4 2 4 4	PRIVATE Public Public Public Private Private	CA CA CA CA	42.86% 28.57% 7.14% 7.14%	ID'D AT INITIAL SCHL	INTIAL SCHL BLOCKED 0 0 0	INTIAL SCHL DETAIL RPT	AWARDED DEG THIS SCHL 2 0 1 1	AWARDED DEG LATER SCHLS



# **Detail Report**

File Name Format: Sending FTP Account\_Submission ID\_DETRPT\_Search Option\_Date and Time\_Batch Query File Name.csv

(e.g., 001234ST\_250966\_DETRPT\_SE\_06302016120000\_SPR2005\_COHORT2.CSV)

The Detail Report provides all postsecondary term information we were able to locate and return on your students within your search variables. Each row contains information on one postsecondary term, or a degree (if available). For questions about reviewing the reports, please refer to the Detail Report Guide at http://studentclearinghouse.info/onestop/wp-content/uploads/ST DetailReportGuide.pdf.

#### Student Information

**This is Columns A to H of the Detail Report.** This section contains what you entered for each student in your Batch Query File.

4	А	В	С	D	Е	F	G	Н
1	Your Unique Identifier	First Name	Middle Initial	Last Name	Suffix	Requester Return Field	Record Found Y/N	Search Date
2		DARREN	Α	YOUNG		123456789_	Υ	20080915
3		DARREN	Α	YOUNG		123456789_	Υ	20080915
4		ROBERT	В	FORD	Ш	987654321_	N	20080915
5		FRANK		HWANG		123459876_	Υ	20080915
6		FRANK		HWANG		123459876_	Υ	20080915
7		FRANK		HWANG		123459876_	Υ	20080915
8		FRANK		HWANG		123459876_	Υ	20080915
9		FRANK		HWANG		123459876_	Υ	20080915
10		FRANK		HWANG		123459876_	Υ	20080915
11		FRANK		HWANG		123459876_	Υ	20080915
12		FRANK		HWANG		123459876_	Υ	20080915
13		FRANK		HWANG		123459876_	Υ	20080915
14		FRANK		HWANG		123459876_	Υ	20080915

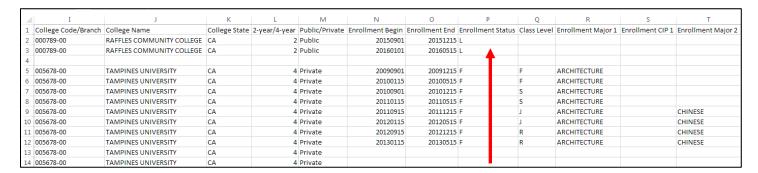
Notice how Darren A. Young appears twice in this report. This is because Darren has two postsecondary terms within this file's search range that we were able to report.

#### **Enrollment Information**

**This is Columns I to U of the Detail Report**. This section contains enrollment information for your students as reported by their schools. Note that Columns N and O list Term Begin and Term End dates, respectively.

Your school must submit Expanded Data Elements in its Enrollment Reporting files in order to receive expanded data (Columns Q-U).





**Note:** Enrollment Status (Column P) may not be returned in reports for specific students if their reporting institution considers it directory information (this will block this data element from being released).

From this section, we can conclude that Darren A. Young attended Raffles Community College (a 2-year, public college in California) in the fall 2015 and spring 2016 terms. By referencing the **Detail Report Guide**, we find that both of Darren's terms are Less-than-half Time (L), meaning he probably only took one to two courses at Raffles each reported term.

### **Degree Information**

**This is Columns V to AB of the Detail Report.** This section contains degree information, if available. Your school must be active with the DegreeVerify service to receive degree information in your reports. For more information on the DegreeVerify service, visit <a href="http://studentclearinghouse.org/colleges/degreeverify">http://studentclearinghouse.org/colleges/degreeverify</a>.

1	V	W	X	Υ	Z	AA	AB	AC
1	Graduated?	Graduation Date	Degree Title	Degree Major 1	Degree CIP 1	Degree Major 2	Degree CIP 2	College Sequence
2	N							1
3	N							
4								
5	N							1
6	N							
7	N							
8	N							
9	N							
10	N							
11	N							
12	N							
13	Υ	20130515	BA	ARCHITECTURE				
14	Υ	20130515	BA			CHINESE		

While Darren did not receive any degrees within your search range, student Frank Hwang received two Bachelors of Arts (in Architecture and in Chinese) for the spring 2013 semester.



# **Appendix A: File Formatting and Submission Guide**

If you want to query between 11 and 250.000 students, create and submit a Batch Query File. A Batch Query File is an Excel spreadsheet that contains the students you want to query and is formatted to our system's requirements.

Here is a sample completed Batch Query File (with fake data) provided for visual reference:

	Α	В	С	D	Е	F	G	Н	1	J	K	L
1	H1	001234	00	HOMETOWN UNIVERSITY	20160101	SE	ı					
2	D1		Asante	A	Albertson	Jr	19900320	20150601		001234	00	10045643.M.ROTC
3	D1		Julie	Υ	Budet		19901229	20150601		001234	00	10098456.F.ROTC
4	D1		Nadia		Nesvaderani		19900821	20150601		001234	00	10065486.F
5	D1		Frank	G	Hwang		19900104	20150601		001234	00	10098453.M
6	D1		Robert	A	Pacino		19900316	20150601		001234	00	10023785.M
7	D1		Micheal	В	Ford	Ш	19900419	20150601		001234	00	10035456.M
8	D1		Tricia	0	Ignacio		19900514	20150601		001234	00	10044456.F
9	D1		Henry	V	Larsson		19900801	20150601		001234	00	10041134.M
10	D1		Lauren	Е	Hamilton		19901202	20150601		001234	00	10084985.F.ROTC
11	D1		Samy	L	Besson		19900715	20150601		001234	00	10084543.M
12	D1		Samuel		Park		19900425	20150601		001234	00	10034958.M
13	T1	13										

The process for creating and submitting a Batch Query File is as follows:

Step	Description	Page
1	Set Search Variables (Search Options Guide)	20
2	Create Your Batch Query File	21
	Set Cells to Text Format	21
	Create Your Header Row	22
	Create Your Student Detail Rows	23
	Create Your Trailer Row	24
	Save Your File in Text (Tab Delimited) Format	24
3	Submit Your Batch Query File	25
4	Download Your Reports	26
File Formatting Guide – Quick Reference		27
File Formatting Guide – Flat File		28

For assistance, please contact us at **StudentTracker@StudentClearinghouse.org** or **703-742-4211**.

# **Step 1: Set Search Variables**

Select one of the Search Options below that best fits your search scenario. Then, choose an appropriate Search Begin Date for each student you will be querying.

Each Search Option has its own search behavior and requirements:

• CO, DA, and SE queries locate enrollment records with a Term End Date of the Search Begin Date OR LATER, and/or degree records with an Award Date of the Search Begin Date OR LATER.



 PA queries locate enrollment records with a Term End Date of the Search Begin Date OR EARLIER, and/or degree records with an Award Date of the Search Begin Date OR EARLIER.

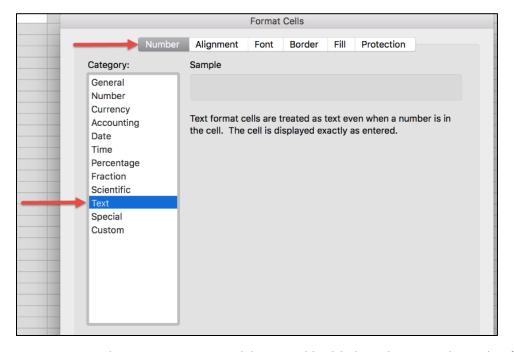
Query Option and Potential Purpose	Potential Search Begin Date	Can Submit SSN?
Declined Admissions (DA) Enrollment of former applicants who chose not to enroll at your system.	Start date of admission term at your system.	N
Prior Attendance (PA) Historical enrollment of pending applicants to your system and current students.	Pending Applicant: Start date of admission term at your system.  Current Student: Start date of first term at your system.	Y if Pending Applicant N if Current Student
Subsequent Enrollment (SE) Concurrent enrollment of current students. Subsequent enrollment of former students.	Current Student: 2 weeks into term at your system. Former Student: 1 month after leaving your system.	N

For assistance, please contact us at **StudentTracker@StudentClearinghouse.org** or **703-742-4211**.

# **Step 2: Create Your Batch Query File**

#### Set Cells to Text Format

To retain leading zeroes in your file, all cells in your file **must** be formatted in TEXT format.



- 1. In Excel, open a new spreadsheet and highlight columns A through L (columns will appear shaded).
- 2. Right-click within the shaded columns and click **FORMAT CELLS**.
- 3. Under the **NUMBER** tab, click **TEXT** and click **OK**.



#### Create Your Header Row

The Header Row informs our system who sent the file, when they sent the file, and what type of query to perform.

This row should be the first row in your file.

#### Sample Header Row

	Α	В	С	D	Е	F	G	Н	- 1	J	K	L
1	H1	001234	00	HOMETOWN UNIVERSITY	20160101	SE	I					

#### \* = Required field.

Col.	Field	Sample Header Row	Limit	Comments
Α	H1 *	H1	2	Indicates the start of the Header Row.
В	System Code *	001234	6	Your 6-digit system code.
С	Blank Cell		0	Leave blank.
D	System Name *	HOMETOWN UNIVERSITY	40	Your school name.
Е	File Creation Date *	20160101	8	The date you are creating your file. All dates must be in YYYYMMDD format.
F	Query Option *	SE	2	DA = Declined Admissions PA = Prior Attendance SE = Subsequent Enrollment
G	Capital "S" *	I	1	Capital "S" for system.

#### **Create Your Student Detail Rows**

Our system uses what you enter in the Student Detail Rows to locate matching records in our enrollment database. These rows should be entered between the Header Row and Trailer Row in your file. You must enter a minimum of 11 and a maximum of 250,000 Student Detail Rows per file.

#### Sample Student Detail Rows

	Α	В	С	D	Е	F	G	Н	I	J	K	L
2	D1		Asante	A	Albertson	Jr	19900320	20150601		001234	00	10045643.M.ROTC
3	D1		Julie	Υ	Budet		19901229	20150601		001234	00	10098456.F.ROTC
4	D1		Nadia		Nesvaderani		19900821	20150601		001234	00	10065486.F
5	D1		Frank	G	Hwang		19900104	20150601		001234	00	10098453.M
6	D1		Robert	A	Pacino		19900316	20150601		001234	00	10023785.M
7	D1		Micheal	В	Ford	Ш	19900419	20150601		001234	00	10035456.M
8	D1		Tricia	0	Ignacio		19900514	20150601		001234	00	10044456.F
9	D1		Henry	V	Larsson		19900801	20150601		001234	00	10041134.M
10	D1		Lauren	Е	Hamilton		19901202	20150601		001234	00	10084985.F.ROTC
11	D1		Samy	L	Besson		19900715	20150601		001234	00	10084543.M
12	D1		Samuel		Park		19900425	20150601		001234	00	10034958.M

#### \* = Required field.

Col.	Field	Sample Detail Row	Limit	Comments
Α	D1 *	D1	2	Indicates the start of a Student Detail Row.

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Col.	Field	Sample Detail Row	Limit	Comments
В	Social Security Number		9	IF PA query on non-enrolled, enter 9-digit SSN.
				• IF CO, DA, or SE query, leave blank.
С	First Name *	ASANTE	20	Student's first name.
D	Middle Initial	Α	1	Strongly recommended for best results.
E	Last Name *	ALBERTSON	20	Student's last name.
F	Suffix	JR	5	Student's suffix.
G	Date of Birth	19900320	8	<ul> <li>Strongly recommended for best results.</li> </ul>
				All dates must be in YYYYMMDD format.
Н	Search Date *	20150601	8	All dates must be in YYYYMMDD format.
1	Blank Column *		0	Leave this column blank.
J	School Code *	001234	6	The first 6 digits of student's OPE ID.
K	Branch Code *	00	2	The last 2 digits of student's OPE ID.
L	Requester Return Field	10045643.M.ROTC	50	<ul> <li>Identifier info you want returned (e.g. Student ID).</li> </ul>
				• Use a period to separate identifiers (e.g. ID1.ID2.ID3).
				• DO NOT include symbols (e.g. !, @, #, etc.).
				We do not match using identifier information.

**Note:** You MUST enter a School Code (Column J) and Branch Code (Column K) to receive the student's degree record. Please DO NOT include accented and/or special characters in student name fields (columns C, D, E, F).

#### **Create Your Trailer Row**

The Trailer Row informs our system that your file ends at that row. This row should be the last row in your file.

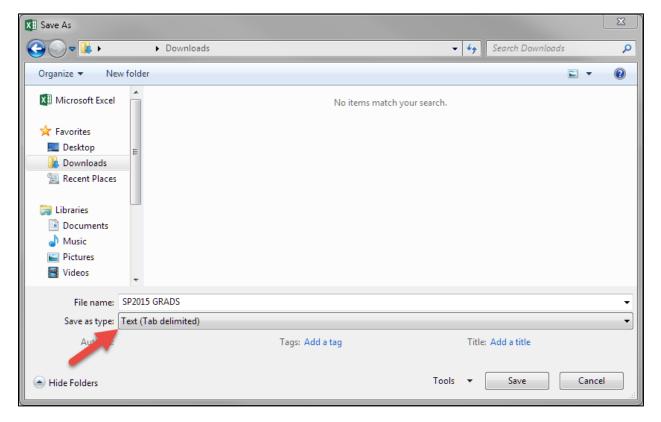
#### Sample Trailer Row

	Α	В	С	D	Е	F	G	Н	1	J	K	L
13	T1	13										

Col.	Field	Sample Trailer Row	Limit	Comments
Α	T1 *	T1	2	Indicates the start of a Trailer Row.
В	Row Count *	13	6	The number of rows in your file.



### Save Your File in Text (Tab Delimited) Format

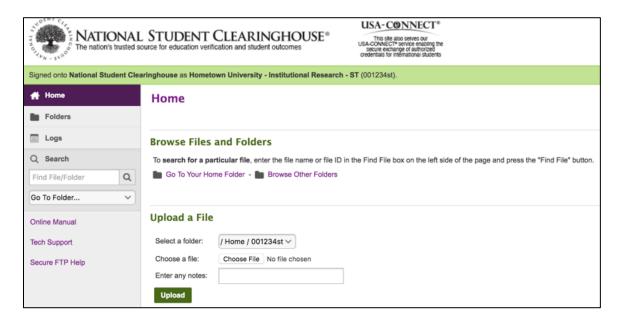


- 1. In Excel, click **FILE** and **SAVE AS**.
- 2. In the **SAVE AS** window, choose the location on your computer where you would like to save your file.
- 3. Enter a **FILE NAME**. Your file name must not contain special characters (e.g. !, @, #, etc.).
- 4. In the SAVE AS TYPE drop-down, choose TEXT (TAB DELIMITED).
- 5. Click **SAVE** and click **YES** for any pop-ups that appear.

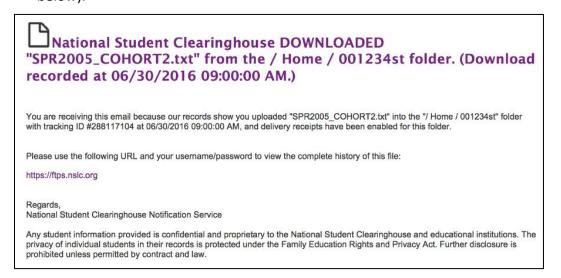
# **Step 3: Submit Your Batch Query File**

To protect your student's data, all files must be submitted to us through your StudentTracker FTP account.





- Log in to your StudentTracker FTP account from the FTP site: FTP LOGIN from www.StudentClearinghouse.org. If you require a password reset, please email StudentTracker@StudentClearinghouse.org.
- 2. After you log in, you may upload your file using the Upload/Download Wizard or manually. Both methods of upload have the same procedure, but we recommend hitting **DISABLE THE WIZARD** and uploading manually.
- 3. Click CHOOSE FILE, navigate to the file you want to upload on your computer, and click UPLOAD FILE.
- 4. All users with the **FTP** role will receive an upload confirmation email for each file you send us (see below).





### **Step 4: Download Your Reports**

1. When reports are ready to download, all users with the **FTP** role will receive a notification email for each set of reports ready to download (see below).



- Log in to your StudentTracker FTP account from the FTP site: FTP LOGIN from www.StudentClearinghouse.org. If you require a password reset for your FTP account, please email StudentTracker@StudentClearinghouse.org.
- 3. Click **FOLDERS** on the left side of the FTP home page, then click through a trail of folders: **HOME** → **[YOUR FTP USERNAME]** → **RECEIVE**



4. Click for each file to download the file.

**Note:** For security purposes, reports in the Receive folder are automatically deleted after a set period of days after receipt. Reports in the Receive-Archive folder are also automatically deleted after an extended set period of days after receipt. Please download and save any reports to your local device if needed in the future.



# **File Formatting Guide: Quick Reference**

	Α	В	С	D	E	F	G	Н	- 1	J	K	L
1	H1	001234	00	HOMETOWN UNIVERSITY	20160101	SE	I					
2	D1		Asante	A	Albertson	Jr	19900320	20150601		001234	00	10045643.M.ROTC
3	D1		Julie	Υ	Budet		19901229	20150601		001234	00	10098456.F.ROTC
4	D1		Nadia		Nesvaderani		19900821	20150601		001234	00	10065486.F
5	D1		Frank	G	Hwang		19900104	20150601		001234	00	10098453.M
6	D1		Robert	Α	Pacino		19900316	20150601		001234	00	10023785.M
7	D1		Micheal	В	Ford	Ш	19900419	20150601		001234	00	10035456.M
8	D1		Tricia	0	Ignacio		19900514	20150601		001234	00	10044456.F
9	D1		Henry	V	Larsson		19900801	20150601		001234	00	10041134.M
10	D1		Lauren	E	Hamilton		19901202	20150601		001234	00	10084985.F.ROTC
11	D1		Samy	L	Besson		19900715	20150601		001234	00	10084543.M
12	D1		Samuel		Park		19900425	20150601		001234	00	10034958.M
13	T1	13										

<sup>\* =</sup> Required field. Minimum of 11 and maximum of 250,000 Student Detail Rows per file.

### **Create Header Row**

Col.	Field	Sample File	Limit	Comments
Α	H1 *	H1	2	Indicates the start of the Header Row.
В	System Code *	001234	6	Your 6-digit system code.
С	Blank Cell *		0	Leave blank.
D	System Name *	HOMETOWN SYSTEM	40	Your system name.
Е	File Creation Date *	20160101	8	The date you are creating your file. All dates must be in YYYYMMDD format.
F	Query Option *	SE	2	DA = Declined Admissions PA = Prior Attendance SE = Subsequent Enrollment
G	Capital "S" *	I	1	Capital "S" for system.

### **Create Student Detail Rows**

Col.	Field	Sample File	Limit	Comments
Α	D1 *	D1	2	Indicates the start of a Student Detail Row.
В	Social Security Number		9	IF PA query on non-enrolled, enter 9-digit SSN. IF CO, DA, or SE query, leave blank.
С	First Name *	ASANTE	20	Student's first name.
D	Middle Initial	Α	1	Strongly recommended for best results.
E	Last Name *	ALBERTSON	20	Student's last name.
F	Suffix	JR	5	Student's suffix.
G	Date of Birth	19900320	8	Strongly recommended for best results. All dates must be in YYYYMMDD format.
Н	Search Date *	20150601	8	All dates must be in YYYYMMDD format.
1	Blank Column *		0	Leave this column blank.
J	School Code *	001234	6	The first 6 digits of student's OPE ID.
K	Branch Code *	00	2	The last 2 digits of student's OPE ID.



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Col.	Field	Sample File	Limit	Comments
L	Requester Return Field	10045643.M.ROTC	50	Identifier info you want returned (e.g. Student ID). Use a period to separate identifiers (e.g. ID1.ID2.ID3). DO NOT include symbols (e.g. !, @, #, etc.). We do not match using identifier information.

Note: Please DO NOT include accented and/or special characters in student name fields (columns C, D, E, F).

#### A Special Note Regarding Student Names

Starting in December 2023, the National Student Clearinghouse has allowed for the reporting of a lived (or preferred) first name, lived middle name, and lived last name when reporting student enrollment. StudentTracker allows a user to search on any version of a reported first, middle, or last name through its batch query feature. The name returned in your student detail report will always reflect the name that was submitted in your batch query file.

#### **Create Trailer Row**

Col.	Field	Sample File	Limit	Comments
Α	T1 *	T1	2	Indicates the start of a Trailer Row.
В	Row Count *	13	6	The number of rows in your file.

#### Save File in Text (Tab Delimited) Format

File > Save As > Save As Type: Text (Tab Delimited) > OK all pop-ups

For assistance, please contact us at **StudentTracker@StudentClearinghouse.org** or **703-742-4211**.



# **Appendix B: File Formatting Guide (Flat File)**

\* = Required field. Minimum of 11 and maximum of 250,000 Student Detail Rows per file.

#### **Create Header Row**

Field	Length	Start	Stop	Туре	Comments
H1 *	2	01	02	AN	Indicates the start of the Header Row.
System Code *	6	03	08	N	Your 6-digit system code.
Blank Cell *	2	09	10	N	Leave this cell blank.
System Name *	40	11	50	AN	Your system name.
File Creation Date *	8	51	58	N	The date you are creating your file. All dates must be in YYYYMMDD format.
Query Option *	2	59	60	A	DA = Declined Admissions PA = Prior Attendance SE = Subsequent Enrollment
Capital "S" *	1	61	61	AN	Capital "S" for system.

### **Create Student Detail Rows**

Field	Length	Start	Stop	Type	Comments
D1 *	2	01	02	AN	Indicates the start of a Student Detail Row.
Social Security	9	03	08	N	IF PA query on non-enrolled, enter 9-digit SSN.
Number					IF DA or SE query, leave blank.
First Name *	20	12	10	AN	Student's first name.
Middle Initial	1	32	50	AN	Strongly recommended for best results.
Last Name *	20	33	58	AN	Student's last name.
Suffix	5	53	60	AN	Student's suffix.
Date of Birth	8	58	61	N	Strongly recommended for best results.
					All dates must be in YYYYMMDD format.
Search Begin Date *	8	66	02	N	All dates must be in YYYYMMDD format.
Blank Column *	1	74	08	AN	Leave this column blank.
School Code *	6	75	10	N	The first 6 digits of student's school's OPE ID.
Branch Code *	2	81	50	N	The last 2 digits of student's school's OPE ID.
Requester Return	50	83	58	AN	Identifier info you want returned (e.g. Student ID).
					• Use a period to separate identifiers (e.g. ID1.ID2.ID3).
					• DO NOT include symbols (e.g. !, @, #, etc.).
					We do not match using identifier information.
Filler	368	133	500	AN	Leave this blank.

### **Create Trailer Row**

Field	Length	Start	Stop	Туре	Comments
T1 *	2	01	02	AN	Indicates the start of a Trailer Row.
Row Count *	8	03	10	N	The number of rows in your file.
Filler	490	11	500	AN	Leave this blank.

For assistance, please contact us at **StudentTracker@StudentClearinghouse.org** or **703-742-4211**.