



Postsecondary Data Partnership Fall 2021 Data Submission & Reporting Cycle Webinar

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November 2021



National Student
Clearinghouse

Objectives

By the end of this presentation, you will:

1. Understand the data submission process
2. Learn to manage your file submissions
 - Review
 - Reject
 - Certify
3. Learn how to resubmit data
4. Understand the data quality checks
5. Review resources



Access You Have



Secure FTP

- Used for data submission



PDP Application

- File status/manage submissions



Tableau Dashboards & Analysis Ready File

Fall 2021 Data Submission

Spring and Summer 2021 Term Data

Effective Dates: September 24, 2021 and
November 12, 2021



PDPservice@studentclearinghouse.org

What We'll Need

✓ Create two required and one optional file

- Cohort
- Course
- Financial Aid (optional)
- Update Files (if Necessary)



Verification

✓ Enrollment and degree submissions

- Submitted through other Clearinghouse services

ALL this information is essential to create complete reports!

Pre-Submission Checklist/Best Practices

- View PDP Knowledge Base (resources and FAQs)
- Test your FTP and Application user accounts early on
- Add following emails to your safe senders list:
 - PDPservice@studentclearinghouse.org
 - SecureFTP@studentclearinghouse.org
 - FTPadmin@studentclearinghouse.org



Prepare for Submission



Developing Your File: The Basics

File names all require the FTP Mailbox Identifier (FTP Mailbox Name) as a prerequisite to the file name applied by the submitting organization, as such:

`i_<FTPMAILBOXID>_<FILENAME_WITH_OR_WITHOUT_EXTENSION>`

Example: `i_123456PDP_Hometown_Cohort_Spring2020.txt`

`i_` needs to be at the beginning of the file name.

`123456PDP_` is the FTP Mailbox Name used by the institution to submit files to the Clearinghouse

`Hometown_Cohort_Spring2020.txt` is the file name.

Developing Your Files: The Basics

Must adhere to the following criteria:

- ✓ Comma-delimited format (csv)
- ✓ Flat-file format (txt)

Contains:

- ✓ A valid Header
- ✓ A valid Column Headers (case sensitive)
- ✓ A valid Body (detail record)
- ✓ A valid Trailer section

Cohort File



Sample Cohort Data File

DCE01,10027795,004781,00,,,,,20171030,,TEST2010-11,,,, ← **Header Record**

CH1,Cohort,Cohort Term,Cohort Term Begin Date, Cohort Term End Date,SSN,ITIN,Student ID,First Name,Middle Name, Last Name.Street Une 1,Street line 2,City,State,Zip/Postal Code,Country,Date of Birth,Ethnicity,Race,Institution ID Type,Institution ID,HS Completion Status,HS Completion Year,HS Unweighted GPA,HS Weighted GPA,First Gen,Dual and Summer Enrollment.,Enrollment Type,Number of College Credits Attempted to Transfer,Number of College Transfer Credits Accepted,Math Placement.,English Placement.,Gateway Math Status,Gateway English Status ← **Column Header Record**

D1,2010-11,Fall,20170810,20171220,<SSN Redacted>,<ITIN Redacted>,PDPTTESTSTD053,John,M,Doe,1234 Test St.,Herndon,VA, 20171,US,19800101,H,A,OPEID,00478100,H, 2010,3.52, 3.75,N,DE,F,,,N,N,N,N ← **Detail Record**

D1,2010-11,Fall,20170810,20171220,<SSN Redacted>,<ITIN Redacted>,,PDPTTESTSTD060,Jane,M,Doe,1714 Street St. NE,,St. Cloud, MN,56301,US,19860301,n,W,OPEID,00478100,g,2014,2.88,3.75,b,de,t,40,318,N,N,n,r

T1,5, ← **Trailer Record**

Course File



Sample Course Data File

DCE02,10027795,004781,00,,,,,20170605,,Client File ID 1000,,,, ← **Header Record**

CH1,Cohort,Cohort Term,Academic Year,Term,Institution ID Type,Institution ID,SSN,ITIN,Student ID,First Name,Middle Name,Last Name,Suffix,Current Street 1,Current Street 2,Current City,Current State,Current Zip/Postal Code,Current Country,Date of Birth,Student Phone Number,Pell Recipient,Student Email,CompleteDevMath,CompleteDevEnglish,TransferIntent,Degree Type Sought,Semester/Session GPA,Overall GPA,Course Prefix,Course Number, Section ID,Course Name,Course Description,Course CIP,Course Type,MathOrEnglishGateway,Co-requisite Course,Course Begin Date,Course End Date,Grade,Number of Credits Attempted,Number of Credits Earned,Delivery Method,Core Course,Core Course Type,Core Competency Completed,Total Combined Earned and Transferred Credits,Purpose of Course Exchange,Certification Endorsed Curriculum/Program,Certificate Endorsing Industry,Grade Effective Date,DGI Institution ID Type,DGI Institution ID,DGI Student ID ← **Column Header Record**

D1,2010-11,Fall,2010-11,Spring,OPEID,00478100, <SSN Redacted>, <ITIN Redacted>,PDPTESTSTD054,David,Silva,Villa,,2300 Dulles Station,#300,Herndonnnnnnnnnnnnnnnnn,VA,20171,US,19870415,999-999-9999,Y,TEST@EMAIL.COM,C,C,I,B,3.91,2.98,PHYS,189,Physics,JN3,,65.3215,CU,NA,,20100816,20101220,A,3,3,F,N,,,3,2,,,20101226,OPEID,DGIINST1,DGISTDID054 ← **Detail Record**

D1,2010-11,Fall,2010-11,Spring,OPEID,00478100, <SSN Redacted>, <ITIN Redacted>,PDPTESTSTD055,De,,Ga,,2300 Dulles Stationnnnnnnnnnnnnnnnn,Apt#41545454544464464646434456,Herndon,VA,201711111,US,19810512,999-999-9999,Y,TEST@EMAIL.COM,C,C,I,B,3.81,2.87,CHEM,102,Chemistry,524J,,25.2312,CU,NA,,20100816,20101220,A,3,3,F,N,,,3,2,,,20101226,OPEID,DGIINST1,DGISTDID055

T1,5, ← **Trailer Record**

Financial Aid File (Optional)



Creating a Financial Aid File

DCE03,10027795,004781,00,,,,,20170605,,Client File ID 1000,,,, ← **Header Record**

CH1,Cohort,Cohort Term,Academic Year,Institution ID Type,Institution ID,SSN,ITIN,Student ID,First Name,Middle Name,Last Name,Suffix,Street Line 1,Street Line 2,City,State,Zip/Postal Code,Country,Date of Birth,Applied Aid,Depend,Income,Tuition,Type of Housing,Room Charges,Board Charges,Books,Other Expense,EFC,Marital Status,Number of Dependents,SEOG,TEACH,Veteran and Military,Other Federal Grant,Pell Amount,State Grant Need Based,State Grant Non Need Based, Institution Grant Need Based,Institution Grant Employer Aid,Institution Grant Merit,Institution Grant Military or Veteran,Other Institution Grant Non Need Based,Other Grant,Federal Loan,State Loan,Institution Loan,Parent PLUS,Other Loan,Federal Work,State Work,Inst Work,Other Aid ← **Column Header Record**

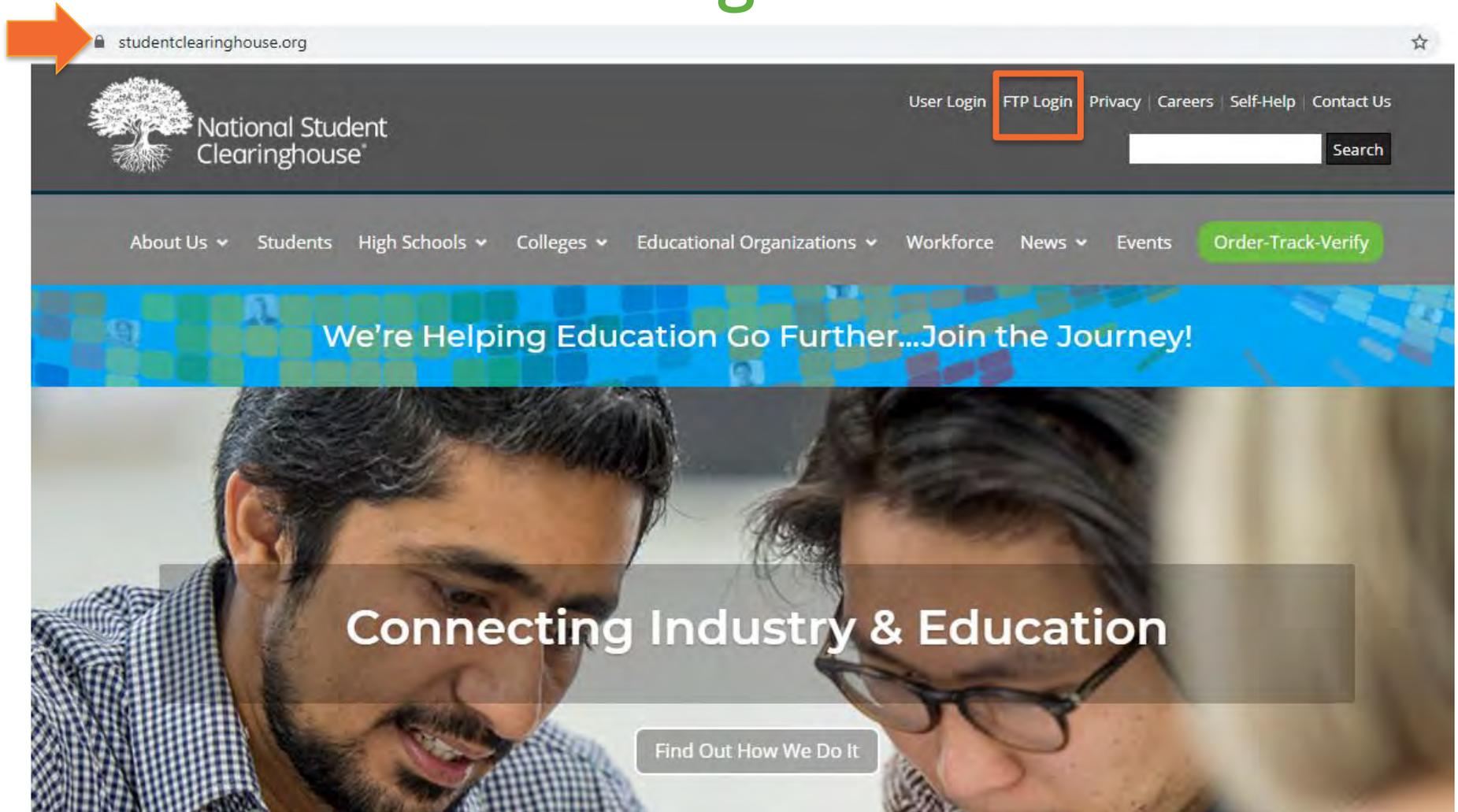
D1,2010-11,Fall,2010-11,OPEID,999999999,123456789,123456789,PDPTTESTSTD054,David,Silva,Villa,,2300 Dulles Station,#300,Herndon,VA,20171,US,19870415,Y,Y,10000,17000,1,500,500,100,1000,0,1,1,0,0,50,0,0,0,0,0,0,0,0,1000,0,0,1000,0,500,500,500,500,500 ← **Detail Record**

T1,4, ← **Trailer Record**

Submitting Your Files



Submitting Your Files



The screenshot shows the website studentclearinghouse.org. An orange arrow points to the address bar. The navigation menu includes links for User Login, FTP Login (highlighted with an orange box), Privacy, Careers, Self-Help, and Contact Us. Below the navigation is a search bar and a secondary menu with links for About Us, Students, High Schools, Colleges, Educational Organizations, Workforce, News, Events, and an Order-Track-Verify button. A blue banner with a grid pattern contains the text "We're Helping Education Go Further...Join the Journey!". Below this is a large image of two men looking at a screen, with the text "Connecting Industry & Education" overlaid. A button labeled "Find Out How We Do It" is positioned at the bottom of the image.

Submitting Your Files



USA-CONNECT®

This site also serves our USA-CONNECT™ service enabling the secure exchange of authorized credentials for international students

Username

Password

[Forgot Password?](#)

Notice
We are upgrading our production Secure FTP environment between 10-11 pm, ET, on Sunday, February 28. During that time you may experience service interruptions.

[Sign On](#)

<https://ftps.nslc.org>

Uploading Files Via the Upload Wizard

Signed onto **QA - National Student Clearinghouse** as **My School (00123400)** [My Account](#) [Sign Out](#) [Help](#)

Home

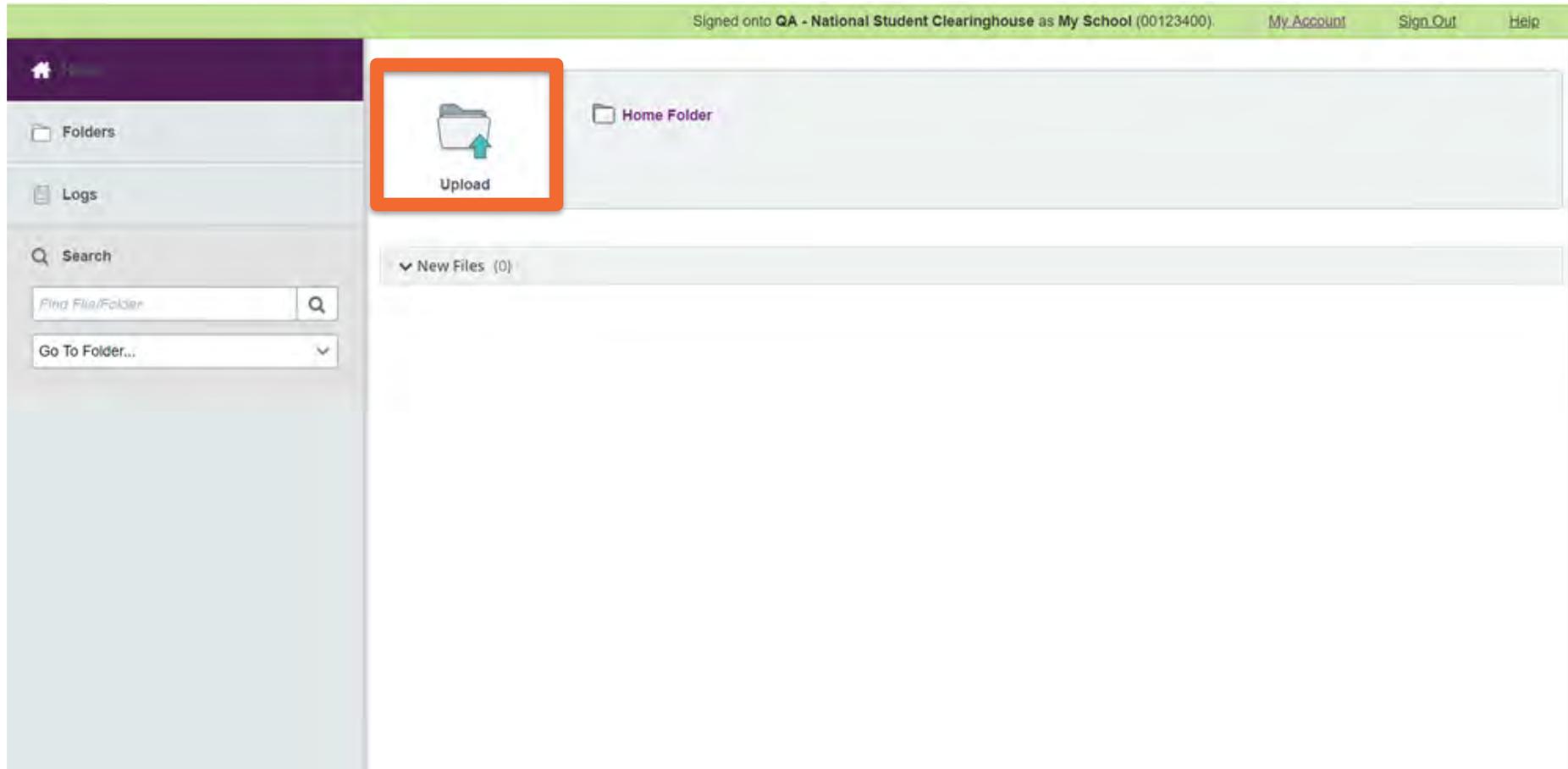
Upload

Home Folder

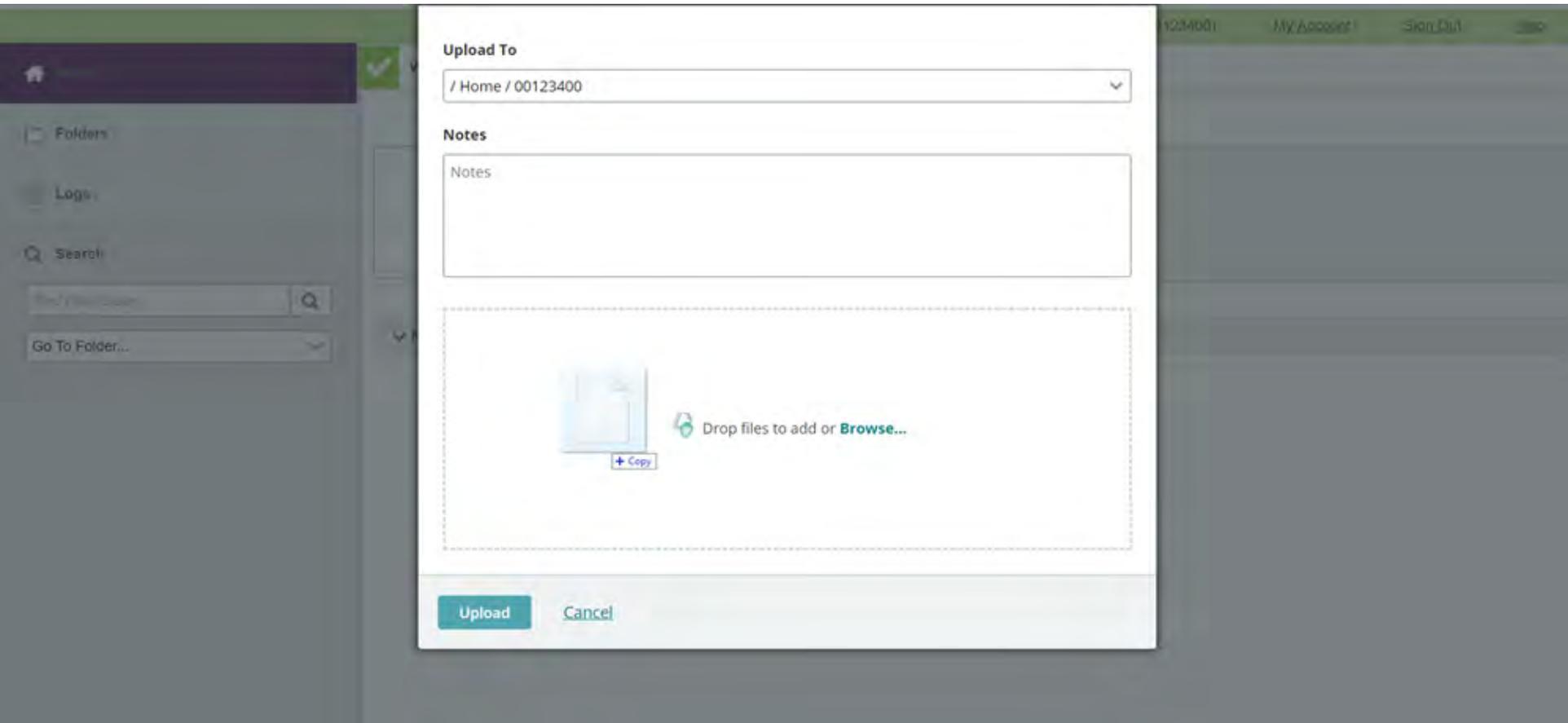
New Files (0)

Find File/Folder

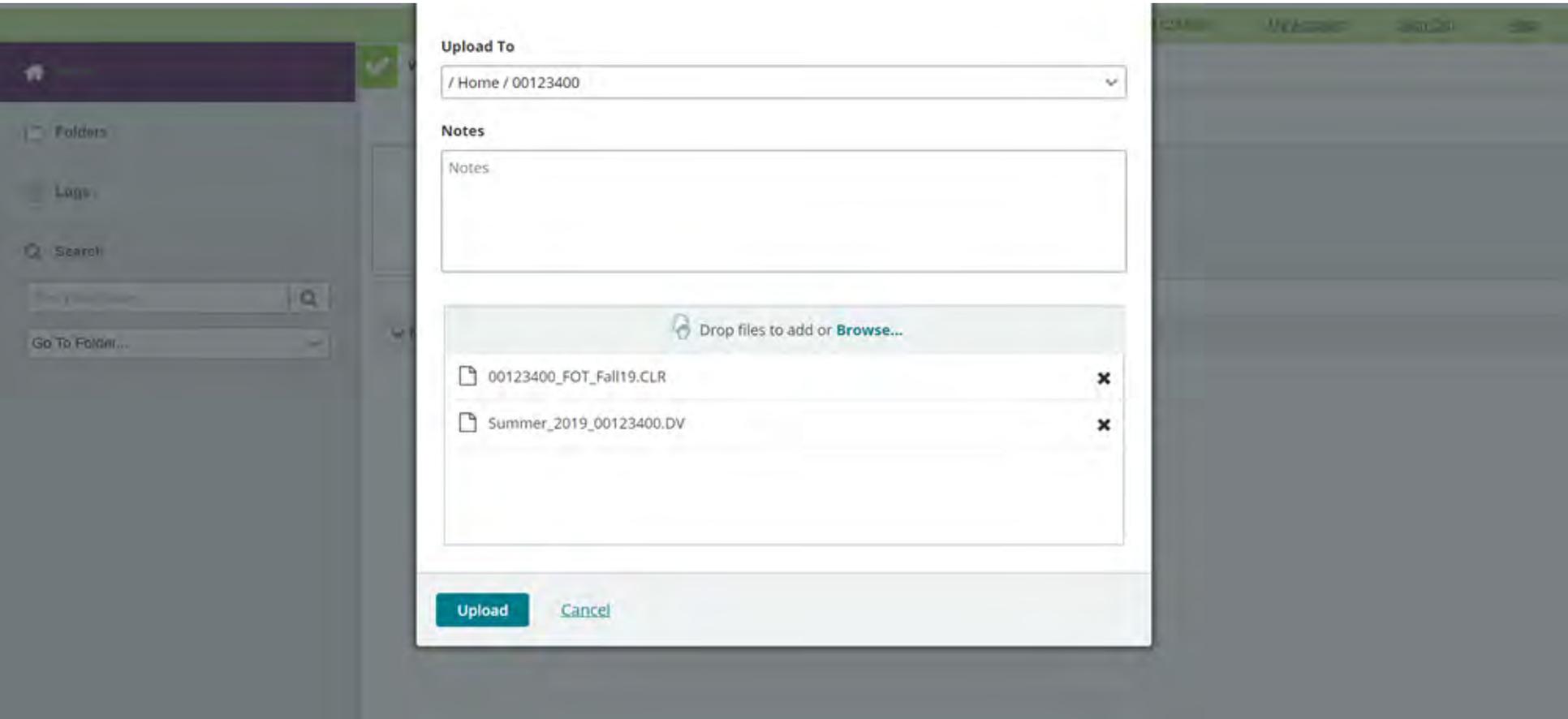
Go To Folder...

The screenshot shows the user interface of the National Student Clearinghouse. At the top, a green header bar contains the text "Signed onto QA - National Student Clearinghouse as My School (00123400)" and links for "My Account", "Sign Out", and "Help". On the left side, there is a dark purple sidebar with a home icon and a list of menu items: "Folders", "Logs", and "Search". The "Search" section includes a text input field labeled "Find File/Folder" with a search icon and a "Go To Folder..." dropdown menu. The main content area is light gray and features a large "Upload" button with a folder icon and a green arrow, which is highlighted by an orange square. To the right of the "Upload" button is a "Home Folder" link. Below these elements is a section titled "New Files (0)".

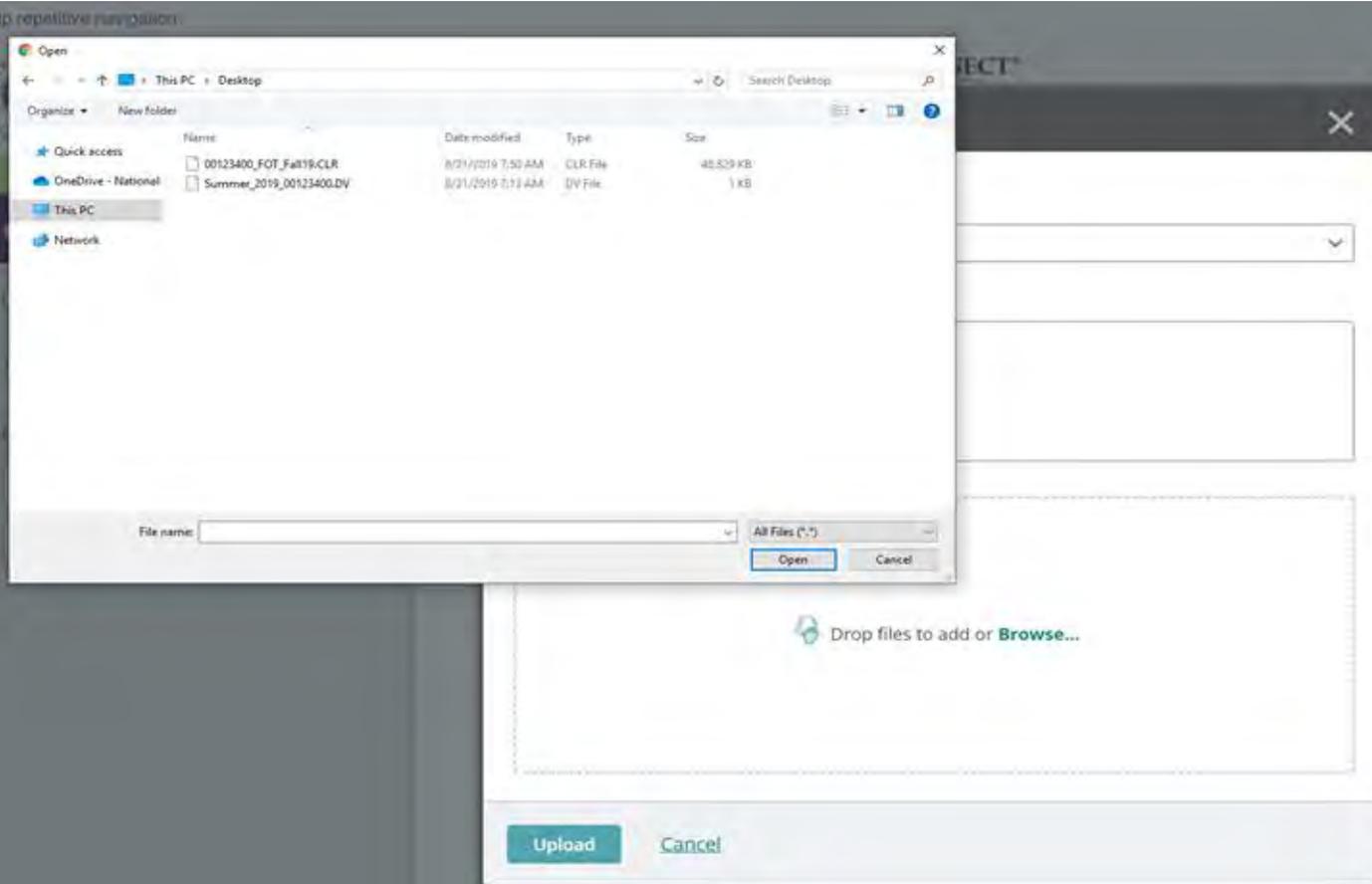
Uploading Files Via the Upload Wizard



Uploading Files Via the Upload Wizard



Uploading Files Via the Upload Wizard



Email Notifications

- ✓ Pickup Confirmation email sent from the Clearinghouse FTP Server
- ✓ The Application will then send you an email indicating:
 - Acceptance of File
 - File Format Error
 - Data Error
- ✓ Log in to PDP Application to confirm the file status

PDP File Upload API- Overview



PDP file Upload API is a new method of data submission using Application programming interface (API)

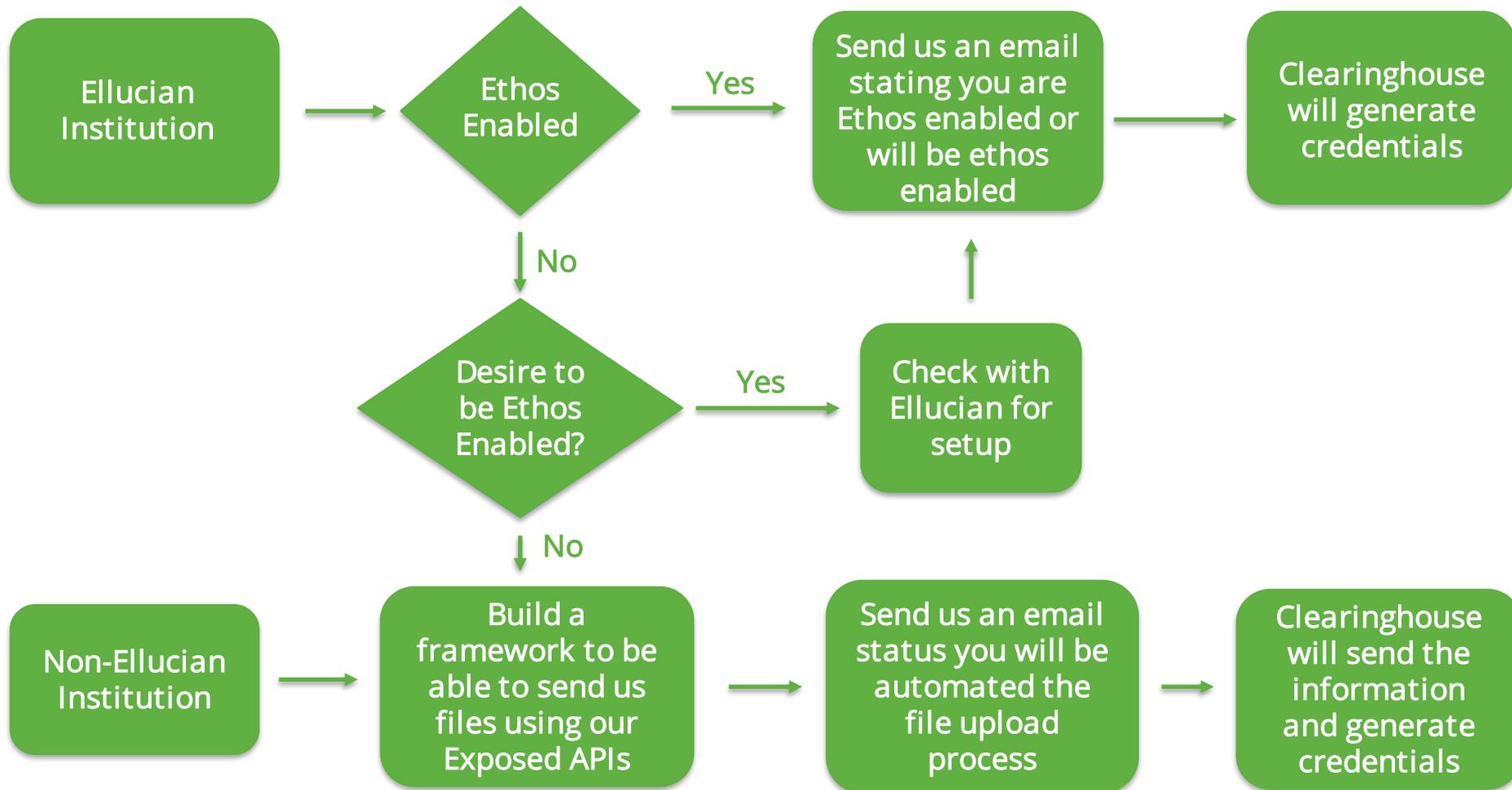


An ability for an external system or a school to automate their upload process by using API to upload a file.



File Upload API is an alternative to FTP for uploading files.

Data File Submission Setup using API



Manage File Submissions



Reviewing File Status



studentclearinghouse.org/colleges/pdp/

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Postsecondary Data Partnership

Measure Student outcomes.
Grow student **success.**



 PDP User Portal

Already signed up for the PDP? Log in to your dashboards, submit your data, check the status of your submission, and more!

[Access Your Resources](#)

Postsecondary Data Partnership User Portal

The Postsecondary Data Partnership is your one-stop shop for easier analysis, explanation, and reporting of your institution's education outcomes. Access your dashboards, submit your data, and find support resources below.

Don't have a login username and password yet? Contact the Clearinghouse for information on how to gain access from your system administrator.

Submit Your Data
Submit your course, cohort, and financial aid files.

Check Status of Submitted Files
Find out the status of your submitted files and when you'll gain access to your PDP insights.

Log In

Forgot Your Password?

Get PDP Support

For all product-related issues and questions, please contact PDP customer support.

Contact Us

SEE PRODUCT UPDATES:

The PDP continues to adapt to changing education needs, staying up to date on the metrics that institutions need for comprehensive evaluation of their student bodies. Find out about our latest product improvements.

Learn More

SUBMIT FEEDBACK:

We strive to send you insights that let you measure and improve student outcomes. And we're always innovating and improving to meet your needs. Let us know how the PDP can best serve you and your institution.

Send Us Your Feedback

Or bookmark this unique URL to your browser:
<https://secure.studentclearinghouse.org/dce/faces/portal>

Reviewing File Status

Log In

Have an account with us? Log in here.

User Name:

Password:

[Forgot your user name or password?](#)

[System requirements](#)

[Service status](#)

Bookmarking this page will result in an error.

Perform a Verification

[Create an account for verification services only](#)

Returning verification services customers registered via social media, log in here: [Google](#) or [LinkedIn](#)

Looking for FTP?

[Secure FTP Login](#)



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Postsecondary Data Partnership

File Submission Summary

Search

Match All Any

Submission Number

Submission Type

Data Status

File Received Date

View

Submission Number	Organization Name	Submission Type	Data Status	File Name	No. of Records	File Received Date	Actions
96083	Pilot University	Financial Aid File	Field Failed	i_PDCTestAccount_FINAID_Error_Files_Smoke...	503	01/06/2020	<input type="button" value="Reject"/>
96082	Pilot University	Financial Aid File	Passed	i_PDCTestAccount_FINAID_Happy_Path.2020...	503	01/06/2020	<input type="button" value="Reject"/>
95697	Pilot University	Course File	Field Failed	i_PDCTestAccount_DCE_Course_Extended_Fil...	7	01/06/2020	<input type="button" value="Reject"/>
95714	Pilot University	Cohort Definition File	Field Failed	i_PDCTestAccount_DCE_Cohort_Definition_Fil...	62	01/06/2020	<input type="button" value="Reject"/>
95696	Pilot University	Course File	Passed	i_PDCTestAccount_DCE_Course_Extended_Fil...	7	01/06/2020	<input type="button" value="Reject"/>
Academic Year: 2011-12 Academic Term: FALL Total Course Count: 4							
95713	Pilot University	Cohort Definition File	Passed	i_PDCTestAccount_DCE_Cohort_Definition_Fil...	55	01/06/2020	<input type="button" value="Reject"/>

Postsecondary Data Partnership

File Submission Summary

Search

Match All AnySubmission Number Submission Type

Data Status

File Received Date

Search

Reset

View

Submission Number	Organization Name	Submission Type	Data Status	File Name	No. of Records	File Received Date	Actions
79686	Pilot University	Financial Aid File	Field Failed	i_PDCTestAccount_FINAID_Error_Files_Smoke...	503	09/11/2019	<input type="button" value="Reject"/>
79685	Pilot University	Financial Aid File	Passed	i_PDCTestAccount_FINAID_Happy_Path.2019...	503	09/11/2019	<input type="button" value="Reject"/>
80100	Pilot University	Course File	Field Failed	i_PDCTestAccount_DCE_Course_Extended_Fil...	7	09/11/2019	<input type="button" value="Reject"/>
80080	Pilot University	Cohort Definition File	Field Failed	i_PDCTestAccount_DCE_Cohort_Definition_Fil...	62	09/11/2019	<input type="button" value="Reject"/>
78899	Pilot University	Course File	Passed	i_PDCTestAccount_DCE_Course_Extended_Fil...	7	09/11/2019	<input type="button" value="Reject"/>
79299	Pilot University	Cohort Definition File	Passed	i_PDCTestAccount_DCE_Cohort_Definition_Fil...	55	09/11/2019	<input type="button" value="Reject"/>
79684	Pilot University	Financial Aid File	Field Failed	i_PDCTestAccount_FINAID_Error_Files_Smoke...	503	09/10/2019	<input type="button" value="Reject"/>



[Postsecondary Data Partnership](#) > **Validation Errors Log**

Validation Error Log

Organization Name:

Service Account Number: 10054170

File Name: i_si1460leap_20190721@234528.ZIP!!si1460leap_hometown_university_prod_course_test_file.txt

Client File Id: TestFilewillFail

Submission Number: 24435

View ▾  Detach

Field Name	Error Message	Error Count	Proposed Solution	Affected Line Numbers
Section ID	Section ID value is invalid.	1	Section ID value is invalid. Section ID may only contain AlphaNumeric (alphabets and/or numbers) characters, and one or more of the following characters - ".,-,_,&".	3

[Go back to Submission](#)



Postsecondary Data Partnership

File Submission Summary

Search

Match All Any

Submission Number

Data Status

Submission Type

File Received Date

Search Reset

View Manage Submissions Review Data Quality Detach

Submission Number	Organization	File Name	Field	Status	File ID	Count	Received	Actions
78899	Pilot U						/2019	Reject
79299	Pilot U						/2019	Reject
79684	Pilot U						/2019	Reject
79683	Pilot U						/2019	Reject
78892	Pilot University	Course File	Field Failed		i_PDCTestAccount_DCE_Course_Extended_Fil...	7	09/10/2019	Reject
79291	Pilot University	Cohort Definition File	Field Failed		i_PDCTestAccount_DCE_Cohort_Definition_Fil...	62	09/10/2019	Reject
78891	Pilot University	Course File	Passed		i_PDCTestAccount_DCE_Course_Extended_Fil...	7	09/10/2019	Reject

Warning

This action cannot be undone

Rejecting the submission will delete the submission data. If rejected by mistake please resubmit the file. Are you sure you want to reject the submission?

Yes No

Postsecondary Data Partnership

File Submission Summary

Search

Match All AnySubmission Number Submission Type

Data Status

File Received Date 

Search

Reset

View

Submission Number	Organization Name	Submission Type	Data Status	File Name	No. of Records	File Received Date	Actions
79688	<input type="text"/> Pilot University	Financial Aid File	Field Failed	i_PDCTestAccount_FINAID_Error_Files_Smoke...	503	09/12/2019	<input type="button" value="Reject"/>
79687	<input type="text"/> Pilot University	Financial Aid File	Passed	i_PDCTestAccount_FINAID_Happy_Path.2019...	503	09/12/2019	<input type="button" value="Reject"/>
80104	<input type="text"/> Pilot University	Course File	Field Failed	i_PDCTestAccount_DCE_Course_Extended_Fil...	7	09/12/2019	<input type="button" value="Reject"/>



Manage Submissions

Search

Select Action: **Certify Submission**

Org ID: 000000

Submission Window: **Fall2020**

Search **Reset**

View ▾  Detach

Submission Number	Service Account Number	Organization Name	Submission Type	Data Status	File Name	No. of Records	File Received Date
78088	10030326	Pilot Un...	Cohort Definitio...	Passed	i_PDCTestAccou...	55	9/2/2019
78488	10030326	Pilot Un...	Course File	Passed	i_PDCTestAccou...	7	9/2/2019
78092	10030326	Pilot Un...	Cohort Definitio...	Passed	i_PDCTestAccou...	55	9/4/2019
79280	10030326	Pilot Un...	Cohort Definitio...	Passed	i_PDCTestAccou...	55	9/5/2019
79282	10030326	Pilot Un...	Cohort Definitio...	Passed	i_PDCTestAccou...	55	9/6/2019
78883	10030326	Pilot Un...	Course File	Passed	i_PDCTestAccou...	7	9/6/2019
78492	10030326	Pilot Un...	Course File	Passed	i_PDCTestAccou...	7	9/4/2019
79288	10030326	Pilot Un...	Cohort Definitio...	Passed	i_PDCTestAccou...	55	9/9/2019
78889	10030326	Pilot Un...	Course File	Passed	i_PDCTestAccou...	7	9/9/2019
79290	10030326	Pilot Un...	Cohort Definitio...	Passed	i_PDCTestAccou...	55	9/10/2019
78891	10030326	Pilot Un...	Course File	Passed	i_PDCTestAccou...	7	9/10/2019
78094	10030326	Pilot Un...	Cohort Definitio...	Passed	i_PDCTestAccou...	55	9/4/2019
79286	10030326	Pilot Un...	Cohort Definitio...	Passed	i_PDCTestAccou...	55	9/8/2019
78887	10030326	Pilot Un...	Course File	Passed	i_PDCTestAccou...	7	9/8/2019
79299	10030326	Pilot Un...	Cohort Definitio...	Passed	i_PDCTestAccou...	55	9/11/2019
78899	10030326	Pilot Un...	Course File	Passed	i_PDCTestAccou...	7	9/11/2019
78086	10030326	Pilot Un...	Cohort Definitio...	Passed	i_PDCTestAccou...	55	9/1/2019
78486	10030326	Pilot Un...	Course File	Passed	i_PDCTestAccou...	7	9/1/2019
79284	10030326	Pilot Un...	Cohort Definitio...	Passed	i_PDCTestAccou...	55	9/7/2019
78885	10030326	Pilot Un...	Course File	Passed	i_PDCTestAccou...	7	9/7/2019
78084	10030326	Pilot Un...	Cohort Definitio...	Passed	i_PDCTestAccou...	55	8/31/2019
78484	10030326	Pilot Un...	Course File	Passed	i_PDCTestAccou...	7	8/31/2019
78490	10030326	Pilot Un...	Course File	Passed	i_PDCTestAccou...	7	9/3/2019

Submission Summary

Cohort Metadata

Year	Term	StudentCount
2015-16	FALL	624

Course Metadata

Year	Term	CourseCount
2011-12	FALL	44

Certify **Cancel and Return**

Postsecondary Data Partnership

File Submission Summary

Search

Match All AnySubmission Number Submission Type

Data Status

File Received Date

Search

Reset

View

Submission Number	Organization Name	Submission Type	Data Status	File Name	No. of Records	File Received Date	Actions
79688	Pilot University	Financial Aid File	Field Failed	i_PDCTestAccount_FINAID_Error_Files_Smoke...	503	09/12/2019	<input type="button" value="Reject"/>
79687	Pilot University	Financial Aid File	Passed	i_PDCTestAccount_FINAID_Happy_Path.2019...	503	09/12/2019	<input type="button" value="Reject"/>
80104	Pilot University	Course File	Field Failed	i_PDCTestAccount_DCE_Course_Extended_Fil...	7	09/12/2019	<input type="button" value="Reject"/>
80083	Pilot University	Cohort Definition File	Field Failed	i_PDCTestAccount_DCE_Cohort_Definition_Fil...	62	09/12/2019	<input type="button" value="Reject"/>
▶ 80103	Pilot University	Course File	Passed	i_PDCTestAccount_DCE_Course_Extended_Fil...	7	09/12/2019	<input type="button" value="Reject"/>
▶ 80082	Pilot University	Cohort Definition File	Passed	i_PDCTestAccount_DCE_Cohort_Definition_Fil...	55	09/12/2019	<input type="button" value="Reject"/>



Postsecondary Data Partnership > **Data Quality Checks Summary**

Data Quality Checks Summary

Search

Match All Any

* Submission Window

Fall 2020

Submission Number

Status

▼

* Org ID

* Required

Search

Reset

View ▼

Detach

Export

Submission Window	Date	Org ID	Institution ID	Status	Submission Number	Allowed Threshold	Fail Percent	Fail Record Count	Check Name	Check Description	Source Type
Fall 2019	8/23/2019		00	PASSED	77289	80	34	44	IDENTIFY RECO...	IDENTIFIES TH...	COHORT
Fall 2019	8/23/2019		00	PASSED	75692	80	34	44	IDENTIFY RECO...	IDENTIFIES TH...	COHORT
Fall 2019	8/23/2019		00	PASSED	75691	80	34	44	IDENTIFY RECO...	IDENTIFIES TH...	COHORT
Fall 2019	8/23/2019		00	PASSED	77290	80	34	44	IDENTIFY RECO...	IDENTIFIES TH...	COHORT
Fall 2019	8/23/2019		00	FAILED	77290	5	100	128	IDENTIFY DUPLI...		COHORT
Fall 2019	8/23/2019		00	FAILED	75691	5	100	128	IDENTIFY DUPLI...		COHORT



Overriding Data Quality Errors



Overriding Data Quality Errors and When to Do So

You can override many common data quality errors on your own, including:

- Degree Type Sought = *UK*
- Gateway Math Status is the same as Gateway English Status

For some data quality errors, you should contact us before overriding them. These include:

- Duplicate courses or students across multiple data submissions
- Duplicate courses or students in your most recent data submission

Overruling Data Quality Errors

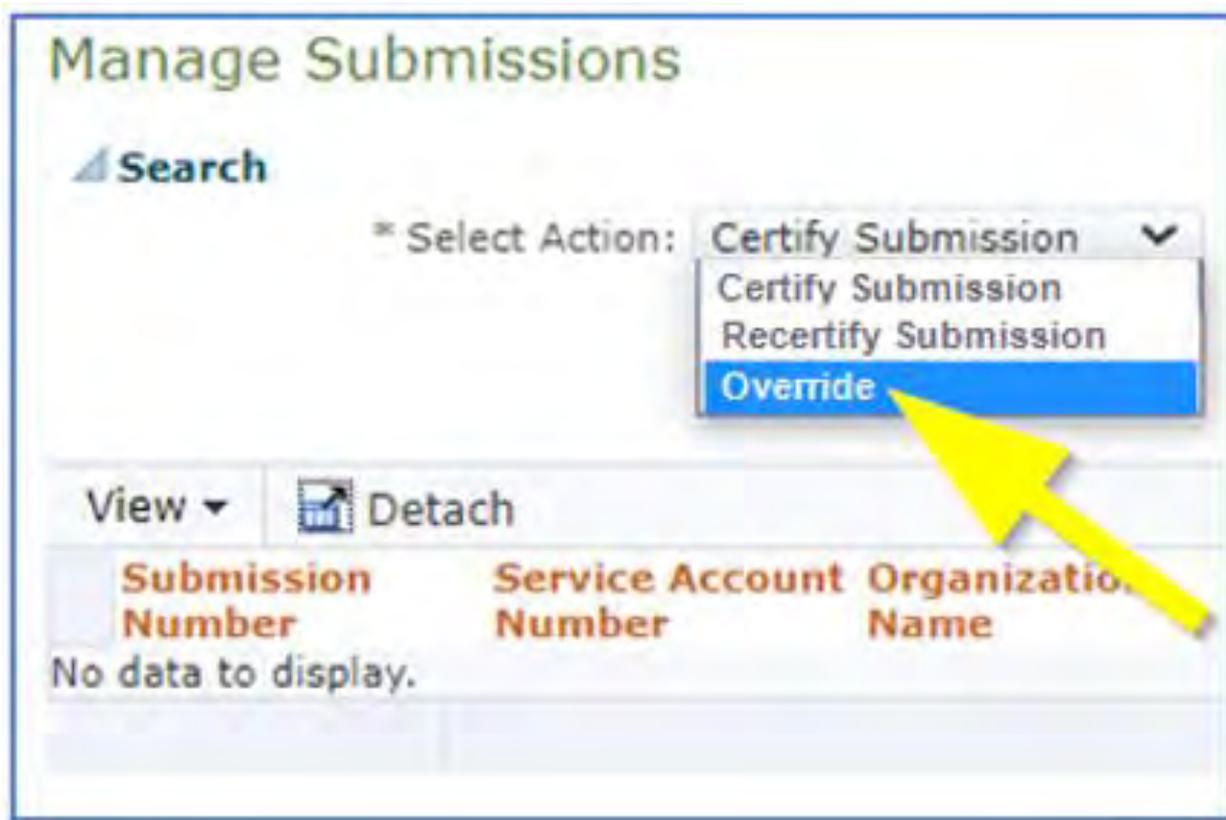
On the *File Submission Summary* screen, click **Manage Submissions**.

The screenshot shows the 'File Submission Summary' interface. At the top, there is a search section with a 'Match' dropdown set to 'All'. Below this are four input fields: 'Submission Number', 'Submission Type', 'Submission Status', and 'Service Account Number'. Two green buttons, 'Search' and 'Reset', are positioned below the search fields. Below the search section is a navigation bar with three buttons: 'View' (with a dropdown arrow), 'Manage Submissions', and 'Review Data Quality'. To the right of these buttons is a 'Detach' icon. Below the navigation bar is a table with the following columns: 'Submission Number', 'Service Account Number', 'Organization Name', and 'Submission Type'. The table contains three rows of data. A yellow arrow points to the 'Manage Submissions' button.

Submission Number	Service Account Number	Organization Name	Submission Type
133681	10030326	Pilot University	Financial Aid File
133680	10030326	Pilot University	Financial Aid File
133383	10030326	Pilot University	Course File

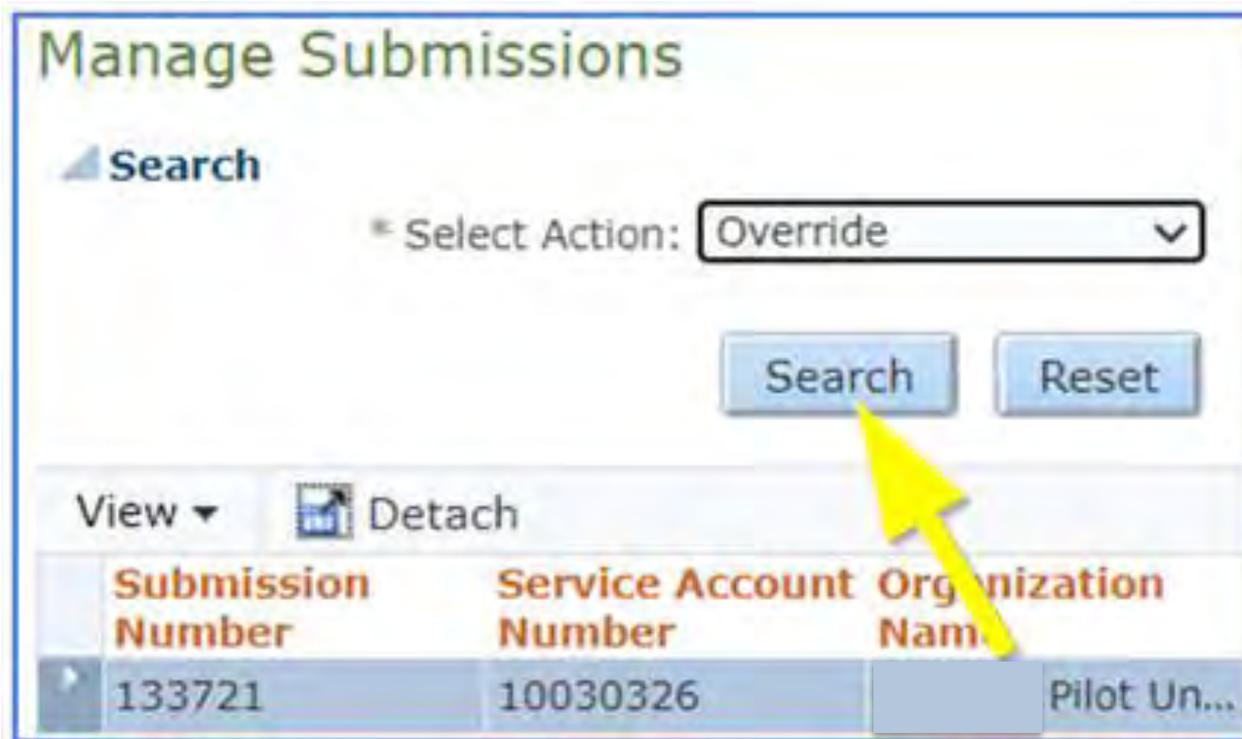
Overriding Data Quality Errors

From the *Select Action* drop-down, select **Override**.



Overriding Data Quality Errors

Click Search.



The screenshot shows a web interface titled "Manage Submissions". It features a search section with a "Select Action:" dropdown menu currently set to "Override". Below the dropdown are two buttons: "Search" and "Reset". A yellow arrow points to the "Search" button. Below the search section is a table with columns for "Submission Number", "Service Account Number", and "Organization Name". The first row of data shows "133721", "10030326", and "Pilot Un...".

Submission Number	Service Account Number	Organization Name
133721	10030326	Pilot Un...

Overriding Data Quality Errors

Review the files in the submission and click **Override**.

The screenshot shows the 'Manage Submissions' interface. At the top, there is a search bar with a dropdown menu set to 'Override'. Below the search bar are 'Search' and 'Reset' buttons. A 'View' dropdown and a 'Detach' icon are also present. The main part of the interface is a table with the following data:

Submission Number	Service Account Number	Organiza Name	Submissi Type
130487	10035184	BRYN ...	Cohort De
130502	10035184	BRYN ...	Course Fil
130489	10035184	BRYN ...	Cohort De
130503	10035184	BRYN ...	Course Fil

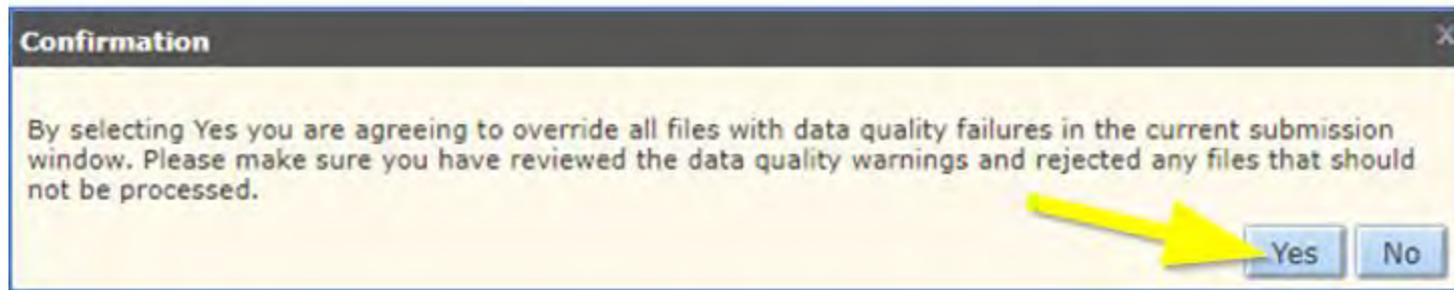
Below the table is a 'Submission Summary' section with 'Cohort Metadata' table:

Year	Term	StudentCount
2011-12	FALL	12

At the bottom of the interface, there are two buttons: 'Override' and 'Cancel and Return'. A yellow arrow points to the 'Override' button.

Overriding Data Quality Errors

Click **Yes** to confirm.



Recertifying Your Submissions



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Recertifying Your Submissions

You may need to recertify a submission if:

- After certifying a submission, you uploaded additional data.
- You have replaced one or more files that failed data quality checks.

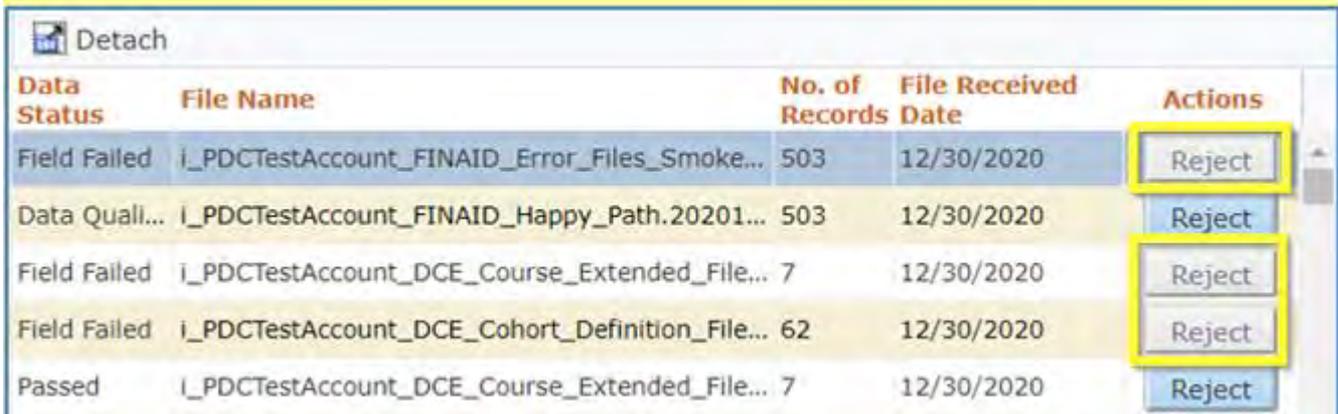
Certifying vs Recertifying

Certifying vs. Recertifying

- **Certifying:** You can only certify a submission once per submission window. You should upload all data files in the submission before you certify the submission.
- **Recertifying:** You should only recertify a submission when you are adding additional files or resubmitting a file with data quality issues. You can recertify a single cohort or course file, depending on what you need to re-submit.

Recertifying Your Submission

Once the additional or replacement data has passed validation checks, the submission status will show as “Ready for Merge.” This means that the new data is ready to merge with the data you submitted previously. Once you recertify the submission, the data will be merged and processed. Remember to reject any files that you are replacing.



The screenshot shows a software interface with a table of submission data. The table has five columns: Data Status, File Name, No. of Records, File Received Date, and Actions. The 'Actions' column contains 'Reject' buttons for each row. The first, second, and third rows have yellow boxes around their 'Reject' buttons. The fourth row has a 'Reject' button with a yellow box around it. The fifth row has a 'Reject' button with a blue box around it.

Data Status	File Name	No. of Records	File Received Date	Actions
Field Failed	i_PDCTestAccount_FINAID_Error_Files_Smoke...	503	12/30/2020	Reject
Data Quali...	i_PDCTestAccount_FINAID_Happy_Path.20201...	503	12/30/2020	Reject
Field Failed	i_PDCTestAccount_DCE_Course_Extended_File...	7	12/30/2020	Reject
Field Failed	i_PDCTestAccount_DCE_Cohort_Definition_File...	62	12/30/2020	Reject
Passed	i_PDCTestAccount_DCE_Course_Extended_File...	7	12/30/2020	Reject

Recertifying Your Submission

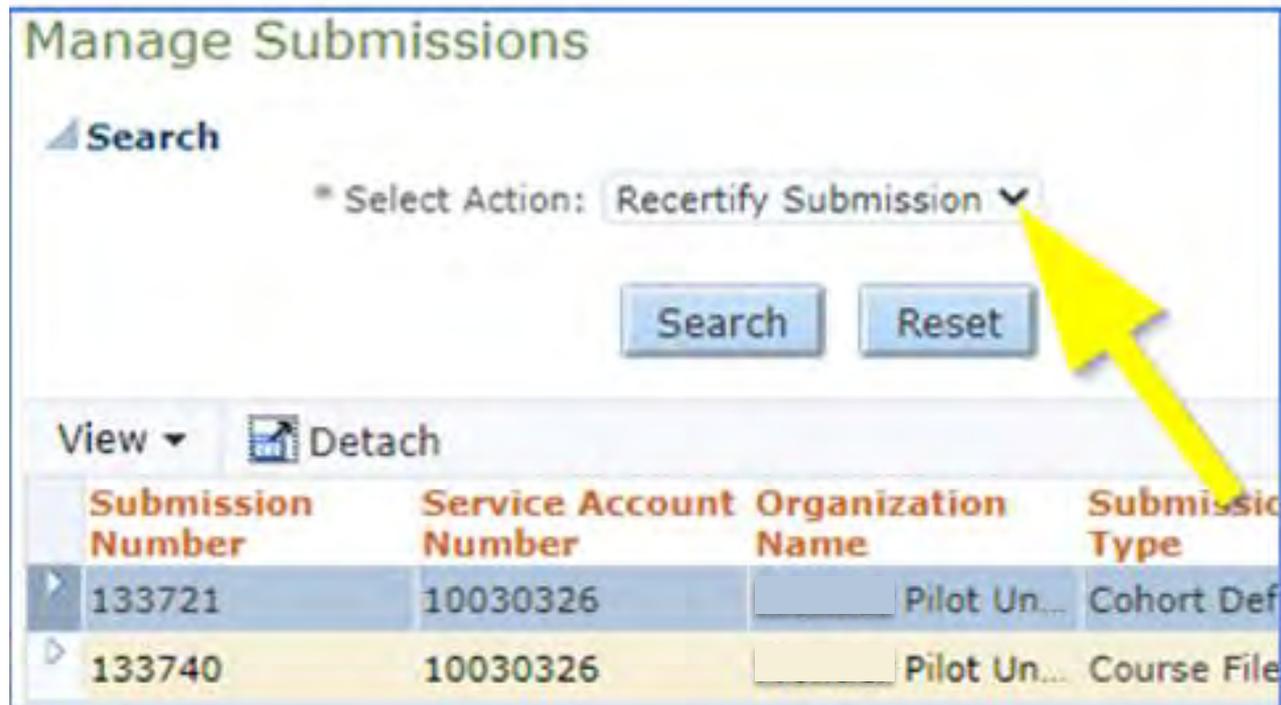
On the *File Submission Summary* screen, click **Manage Submissions**.

The screenshot shows the 'File Submission Summary' interface. At the top, there is a 'Search' section with radio buttons for 'Match' set to 'All'. Below this are input fields for 'Submission Number', 'Submission Type', 'Submission Status', and 'Service Account Number'. Two green buttons, 'Search' and 'Reset', are positioned below the search filters. Below the search section is a navigation bar with buttons for 'View', 'Manage Submissions', 'Review Data Quality', and 'Detach'. A yellow arrow points to the 'Manage Submissions' button. Below the navigation bar is a table with the following data:

Submission Number	Service Account Number	Organization Name	Submission Type
133681	10030326	Pilot University	Financial Aid File
133680	10030326	Pilot University	Financial Aid File
133383	10030326	Pilot University	Course File

Recertifying Your Submission

From the *Select Action* drop-down, select **Recertify Submission**.

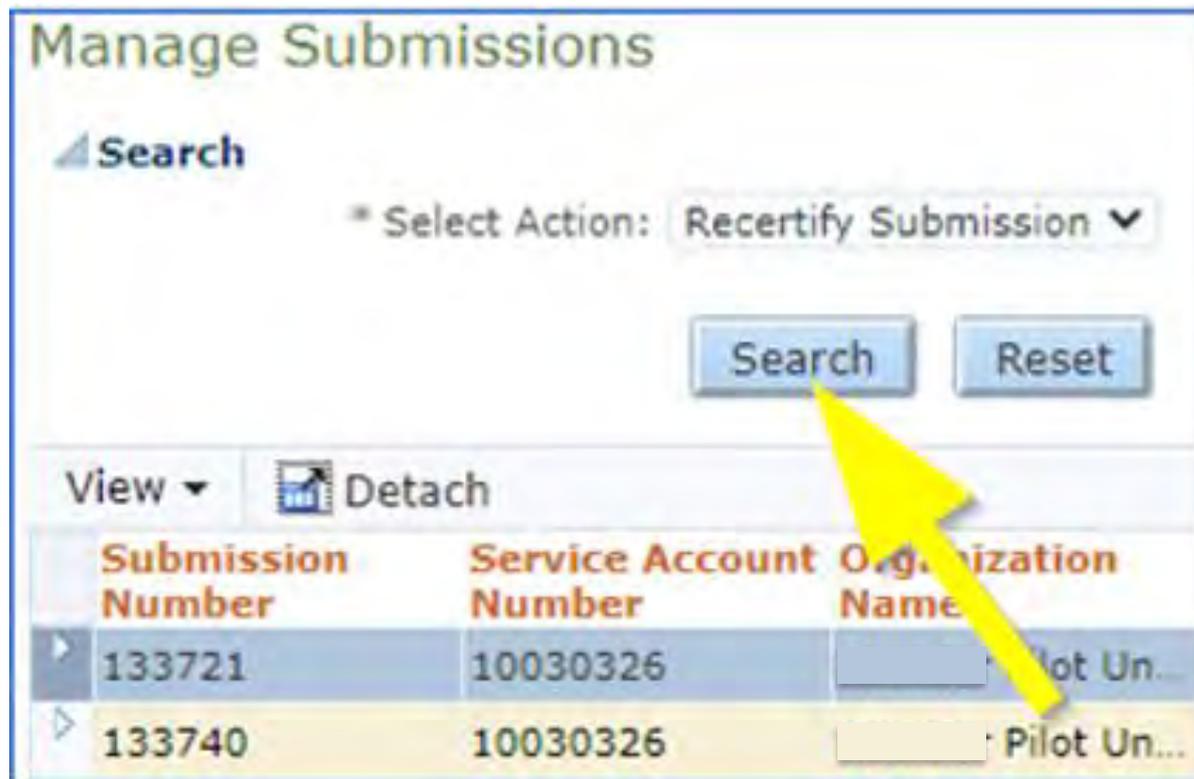


The screenshot displays the 'Manage Submissions' interface. At the top, there is a search section with a 'Select Action' dropdown menu currently set to 'Recertify Submission'. A yellow arrow points to this dropdown. Below the dropdown are 'Search' and 'Reset' buttons. Underneath, there is a 'View' dropdown and a 'Detach' icon. The main part of the interface is a table with the following columns: Submission Number, Service Account Number, Organization Name, and Submission Type. Two rows are visible in the table.

Submission Number	Service Account Number	Organization Name	Submission Type
133721	10030326	Pilot Un...	Cohort Def
133740	10030326	Pilot Un...	Course File

Recertifying Your Submission

Click Search.



The screenshot shows a web interface titled "Manage Submissions". At the top, there is a "Search" section with a dropdown menu labeled "Select Action:" set to "Recertify Submission". Below this are two buttons: "Search" and "Reset". A yellow arrow points to the "Search" button. Below the buttons is a "View" dropdown and a "Detach" icon. At the bottom is a table with three columns: "Submission Number", "Service Account Number", and "Organization Name".

Submission Number	Service Account Number	Organization Name
133721	10030326	Not Un...
133740	10030326	Pilot Un...

Recertifying Your Submission

Review the submissions and click **Recertify**.

The screenshot shows the 'Manage Submissions' interface. At the top, there is a search section with a dropdown menu set to 'Select Action: Recertify Submission' and buttons for 'Search' and 'Reset'. Below this is a table with columns for Submission Number, Service Account Number, Organization Name, and Submission Type. Two rows are visible: one for submission 133721 (Cohort Definition) and one for 133740 (Course File). Below the table is a 'Submission Summary' section with 'Cohort Metadata' showing Year 2015-16, Term FALL, and Student Count 52. At the bottom, there are two buttons: 'Recertify' and 'Cancel and Return'. A yellow arrow points to the 'Recertify' button.

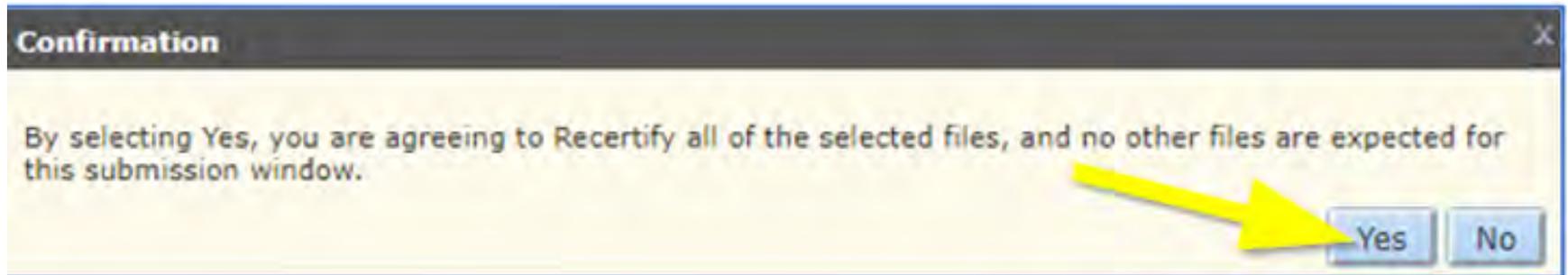
Submission Number	Service Account Number	Organization Name	Submission Type
133721	10030326	Pilot Un...	Cohort Definitio...
133740	10030326	Pilot Un...	Course File

Year	Term	StudentCount
2015-16	FALL	52

Recertify Cancel and Return

Recertifying Your Submission

Click **Yes** to confirm.



Cohort and Course Update Files



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Updating Previously Submitted Data

If you need to make changes to **previously submitted and successfully processed** data, you can submit an update data file.

You can submit an update data file the same way you submitted the original file. The PDP system will match the data with existing data and update it with the new values. Update files do not need to be certified.

Types of Update Files

- **Cohort:** Contains information from the cohort data file.
- **Course Term:** Contains the academic term information from the course data file.
- **Course:** Contains the course information from the course data file.

Cohort Update File

You can send cohort update files for multiple cohorts and any number of students. Updateable Fields are:

- Race
- First Gen
- HS Completion Status
- HS Completion Year
- HS Unweighted GPA
- HS Weighted GPA
- Dual and Summer Enrollment
- Enrollment Type
- Number of College Transfer Credits Attempted
- Number of College Transfer Credits Accepted
- Math Placement
- English Placement
- Gateway Math Status
- Gateway English Status

Course Term Update File

You can submit course term update files for multiple terms and any number of students.

Updateable Fields are:

- Pell Recipient
- Completed Development Math
- Completed Development English
- Transfer Intent
- Degree Type Sought
- Semester/Session GPA
- Overall GPA

Course Update File

Updateable Fields are:

- Grade
- Number of Credits Earned
- Delivery Method
- Grade Effective Date
- Course CIP (only if value was *Missing* in the original data file)
- Course Type
- Math or English Gateway
- Co-requisite Course

Header Record of Update Files

The header record should be the same as the header record in the original data file except for the *Record Type* variable, which must contain a specific value based on the type of update file:

- Cohort Data File = DCE11
- Term Data File = DCE12
- Course Data File = DCE13

The trailer record must be the same as the original data file.

Detail Record of Update Files

The detail records must be formatted the same as in the original data file and must follow all of the requirements. However, the required values are not the same as in the original file.

- Values that you change in the update file will be updated; however, **not all values can be updated.**
- Some values that cannot be updated are still required to match to the original data.
- Some values that were optional in the original file are required in the update file.
- Some values that were required in the original file are optional in the update file. If you submit any of these values, they will not be updated.

Please refer to our PDP Knowledge base for a full list.

Update File Results

- **Source Type:** The type of update file that was submitted (*COHORT-UPDATE*, *COURSE-UPDATE-TERM*, or *COURSE-UPDATE-COURSE*)
- **Org ID:** Your organization ID
- **Institution ID:** The institution ID for the individual update record
- **Submission Line Number:** The record line number from the submitted update file
- **Submission Number:** A unique number that The Clearinghouse assigns to each submitted file
- **Student ID:** Your institutions ID for the student

Update File Results

- **Update Status:** Indicates if the update was successful (*Y* or *N*).
 - *Y* = The update was successful.
 - *N* = We were not able to match all of the criteria required for the update.
- **Student Match Status:** Indicates if we were able to match the data to an existing student.
 - If the Student Match Status is *Y* and the Update Status is *N*, the matching issue is with the cohort term, academic term, or course detail information (depending on the update file type). See Update Errors below for more information.
- **File Name:** The name of the update file submitted by

Update File Errors

If your update results file indicates that a record could not be updated, you should review the data in that record and compare it to the previously submitted data to determine what caused the error. You can also check the **Student Match Status**, which indicates whether or not we were able to match the data to an existing student.

If we were not able to match the data to an existing student, you should confirm that the student data was sent in a previous cohort file and that the student ID or social security number matches the original file.

Update File Errors

If the Student Match Status is *Y* and the Update Status is *N*, you should check the following:

- **Cohort Update File:** Confirm that the cohort term and year are the same as in the original file.
- **Course Term Update File:** Confirm that the academic year and term are the same as in the original file.
- **Course Update File:** If the course information was sent previously, confirm that the required course information, such as the course prefix and course number, is the same as in the original file.

Resubmitting Data

PDPservice@studentclearinghouse.org



Clearinghouse Academy Resources

https://www.studentclearinghouse.org/academy/courses/pdp/

 **Course** **Materials**

In this course you will learn:

- How to manage data submissions
- How to identify and resolve field and structural errors
- How to access the various sites for PDP
- How to add new users and assign user roles

This course is intended for institutions already participating in the PDP service.

Course Content

Developing Your Files

Developing Files - The Basics

Gateway Courses

Manage Data Submissions

Certifying Data Submission is Complete

Rejecting a Submitted File

https://www.studentclearinghouse.org/academy/courses/pdp/

Course **Materials** 

Learn more about our services:

- [Postsecondary Data Partnership \(PDP\)](#)
- For questions, email PDPService@studentclearinghouse.org

Online Help:

- [School Secure Site](#)

Guides:

- [PDP Dashboard Video Tours](#)
- [PDP FAQs](#)
- [New Features to Manage Data Submissions \(pdf\)](#) 

Course Content

Developing Your Files

Developing Files - The Basics

Gateway Courses

Manage Data Submissions

Have Questions? Need Resources?

Visit us online at

[http://www.studentclearinghouse.org/
colleges/PDP/](http://www.studentclearinghouse.org/colleges/PDP/)

or email

PDPservice@studentclearinghouse.org



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