

Data Dictionary

Success Fund Initiative Participants
2025-2026 Program Year
(July 1, 2025 – June 30, 2026)

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Revisions

[illegible]

Data Specification

Terms	Definitions
Data Element	Unique identifier or title of the data element.
Description	Name of the data element.
Definition	A definition of the data element collected.
Data Constraints	Rules or limitations that are applied to the data element.
Data type	Type of data to be entered e.g. alphanumeric, numeric.
Field size	The minimum and maximum number of characters the data item can take. (format: minimum maximum 1 2)
Format/Layout	The structure or pattern the data should follow.
Acceptable Values	The form in which the data is to be entered. Specific set of values that are permitted for a given data field.
Business Rule	Additional Comments or assistance on interpreting, applying or reporting the data item or code set.
Dependency	Refers to a relationship between different data elements where the value of one element is dependent on the value of another element.
Related Fields	List of related fields to the current data element.

Summary

The Fiscal Year 2026 SUCCESS Fund Initiative Participants Collection file **should capture all students in your institution's SUCCESS cohort(s) (both new and continuing) who engaged with services funded by the SUCCESS Initiative during fiscal year 2026** (summer II 2025, fall 2025, winter 2026, spring 2026, summer 1 2026 and full summer 2026). "Engaged with services" means a student had **at least one meaningful interaction** with SUCCESS services (SFI019 – SFI027, SFI037, SFI039) designed to positively impact college outcomes (e.g., retention, course completion, degree or certificate completion, transfer). The definition of a "meaningful interaction" may vary according to the campus context and how SUCCESS is operationalized at an institution (e.g., at one institution, multiple back-and-forth emails between a student and their SUCCESS coach on a specific topic during a given week may be coded as one meaningful coaching interaction). Institutions are strongly encouraged to have decision rules in place for tracking engagement. In all cases, what counts as a meaningful interaction should involve some engagement and action on the part of the student (e.g., formulating a success plan during a meeting with a coach, attending a workshop, getting assistance from a tutor). See the latest [FAQ document](#) on the collection for example decision rules.

Students included in the collection must have met program eligibility criteria. SUCCESS participants are matriculated, degree or certificate-seeking students who enrolled for credit during one or more terms of the program year. While students who are members of one or more of the focus populations specified in the legislative language (i.e., economically disadvantaged students, first-generation college students, racial and ethnic minoritized students, students with disabilities, and LGBTQIA+ students) are largely the initiative's primary participants, all eligible students who are served by SUCCESS should be reported in the collection. Students who have already earned an associate degree (or higher) are not eligible for SUCCESS. For more information, please see the latest [FAQ document](#) on the collection.

Exclude students outreached to who did not engage with SUCCESS services. Because only matriculated students who are degree or certificate-seeking are eligible for the SUCCESS initiative, these are the students who will be reflected in the collection. Exclude students who received any services, such as coaching or advising, prior to entry and who did not matriculate as a degree or certificate-seeking student during the reporting period (e.g., a prospective student who received SUCCESS services during a summer term as a non-degree/certificate seeking student and who did not subsequently matriculate as a degree or certificate-seeking student). SUCCESS student cohorts may be served by other wraparound student support programs (e.g., STEM Starter Academy (SSA), TRIO). Programs that allow SUCCESS participants to be served by other wraparound student support programs are expected to report related details within SFI044.

SUCCESS Initiative **participants should be reported in this collection for every term in the fiscal year during which they engaged** with a SUCCESS-funded initiative program, service, or event. Participants do not need to be enrolled in a term during which they receive services but must be enrolled as a degree/certificate seeking student for at least one term in the

fiscal year. For example, a matriculated degree or certificate-seeking student may only have been enrolled in the spring term but engaged with SUCCESS services in both the winter and spring terms. The student's engagement activity should be reported for both the winter and spring terms. Service activity should be recorded under the term that most closely aligns with the time period during which the service took place.

Please be aware that tracking and reporting on SUCCESS-funded services and their companion interaction fields is **required**. Note that there is no companion interaction field for Case Management (SFI021) because it reflects an overall service approach/model rather than a quantifiable service.

Please direct any questions about completing this collection to Marlene Clapp with the Massachusetts Association of Community Colleges (clappm@mac.mass.edu). Please direct technical questions about the submission to the DHE at wg-tech@bhe.mass.edu. Submission instructions follow in the next section.

Submission instructions:

Submit the **SUCCESS Initiative Participant File** via the DHE Security Portal (<https://gateway.edu.state.ma.us/>):

- a. Create a comma-delimited file that matches the data dictionary layout for the SUCCESS Initiative collection.
- b. Login to the HEIRS system.
- c. Select Step 1: Transmit Data. Then, select the appropriate Year, Term, and File (SUCCESS Initiative (code SFI)).
- d. Once the Participant file for the SUCCESS Initiative has processed successfully, select Step 3: Review Data and run SUCCESS Initiative reports.
- e. Review the SUCCESS Initiative reports for accuracy with your institution's SUCCESS Initiative program director.
- f. **Send a copy of the SUCCESS summary report to Marlene Clapp** (clappm@mac.mass.edu) to verify that the information included in the summary report is accurate.
- g. If the summary report is accurate, then proceed to sign off.

Data Elements

SFI001 - (College ID)

Data Element	SFI001		
Description	College ID		
Definition	An institutional identification code assigned by the Data Dictionary Appendix A: Institution Codes. Code used to identify each college or university in the Commonwealth of Massachusetts.		
Data Constraints		Data type	Numeric
Field size (Min Max)	3 3	Format/Layout	"000"
Acceptable Values	See Data Dictionary Appendix A: Institution Codes		
Business Rule	Mandatory entry		
Dependency	Must match College's ID as specified in Data Dictionary Appendix A – Institution codes. Every record submitted must be the correct college ID and be the same college ID throughout the entire file.		

SFI002 - (Fiscal Year)

Data Element	SFI002		
Description	Fiscal Year		
Definition	The fiscal year (July 1st - June 30th) that is being reported in which the student engaged with any SUCCESS-funded program, service, or event. The fiscal year is the standard IPEDS Fiscal Year (i.e., state fiscal year) extending from July 1st through June 30th. For example, Fiscal Year 2024 covers July 1, 2023, through June 30, 2024. Fiscal Year 2025 covers July 1, 2024, through June 30, 2025. Fiscal Year 2026 covers July 1, 2025, through June 30, 2026, and so on.		
Data Constraints		Data type	Numeric
Field size (Min Max)	4 4	Format/Layout	"YYYY"
Acceptable Values	For example, Fiscal Year 2026 covers July 1, 2025, through June 30, 2026.		
Business Rule	Mandatory entry		
Dependency	Each record must be the correct year as chosen when the file is submitted, not be a year previously submitted, and each record must have this same year.		

SFI003 - (Term)

Data Element	SFI003		
Description	Term		
Definition	The academic term in which the student participated in any SUCCESS-funded program, service, or event. Select “Fall” for Success Fund Initiative activities/events from September through the end of the Fall term. Select “Winter” for Success Fund Initiative activities/events that occur during winter term (or intersession). Select “Spring” for Success Fund Initiative activities/events that occur during the spring term. Select “Full Summer” for Success Fund Initiative activities/events typically with a start date of May/June in the fiscal year for which you are reporting but cross over Summer sessions and may end in the next fiscal year (July/August ex. 12-week course). These should be counted in the fiscal year ending June 30th. “Summer I” Success Fund Initiative activities/events typically have a start date of May in the fiscal year for which you are reporting. (ex. 6-week activity starting in May and ending in June) “Summer II” Success Fund Initiative activities/events typically have a start date of July in the fiscal year for which you are reporting. (ex. 6-week activity beginning in July and ending in August)		
Data Constraints		Data type	Numeric
Field size (Min Max)	1 1	Format/Layout	"0"
Acceptable Values	Code Descriptions 0 Summer II 1 Fall 2 Winter 3 Spring 4 Full Summer 5 Summer I		
Business Rule	Mandatory entry		
Dependency	Must not be a term/year combination previously submitted.		

SFI004 - (Student's Social Security Number)

Data Element	SFI004		
Description	Student's Social Security Number		
Definition	The student's social security number. Unique identification number assigned by the Federal government to each citizen and permanent resident of the United States.		
Data Constraints	Must include leading zeros	Data type	Numeric
Field size (Min Max)	9 9	Format/Layout	"000000000"
Acceptable Values			
Business Rule	Mandatory entry If the student does not have a Social Security number, enter 000000000. Social security numbers are used solely to link students' institutional data with their profile in the National Student Clearinghouse database. DHE does not report/disclose information that would identify students who do not have social security numbers to any external agencies. DO NOT enter an identification code assigned by the institution for this item. Institutionally assigned identifiers should only be reported in the Student ID data element.		
Dependency	First three digits must be between 001 and 899 (excluding 666), middle two digits must be between 01 and 99, and last four digits must be 0001 and 9999.		

SFI005 - (Student ID)

Data Element	SFI005		
Description	Student ID		
Definition	Identification code assigned to the student by the institution. Unique code used by the institution to identify students (i.e., an institutionally assigned identifier not a social security number (SSN)).		
Data Constraints		Data type	Alphanumeric
Field size (Min Max)	1 15	Format/Layout	"0000000000000000"
Acceptable Values			
Business Rule	Mandatory entry		
Dependency	Must be unique for each student submitted. Must be > 0 digits and <= 15 digits.		

SFI006 - (Student's Last Name)

Data Element	SFI006		
Description	Student's Last Name		
Definition	The student's last name.		
Data Constraints		Data type	Alphanumeric
Field size (Min Max)	1 50	Format/Layout	SMITH
Acceptable Values			
Business Rule	Mandatory entry Name can only include letters a-z, periods (.), hyphens (-) or apostrophes (')		
Dependency	Must be > 0 and <= 50 characters.		

SFI007 - (Student's First Name)

Data Element	SFI007		
Description	Student's First Name		
Definition	The student's first name.		
Data Constraints		Data type	Alphanumeric
Field size (Min Max)	1 32	Format/Layout	JANE
Acceptable Values			
Business Rule	Mandatory entry Name can only include letters a-z, periods (.), hyphens (-) or apostrophes (')		
Dependency	Must be > 0 and <= 32 characters.		

SFI008 - (Student's Middle Initial)

Data Element	SFI008		
Description	Student's Middle Initial		
Definition	The student's middle initial.		
Data Constraints		Data type	Alphanumeric
Field size (Min Max)	1 1	Format/Layout	A
Acceptable Values			
Business Rule	Not mandatory but preferred in order to differentiate between students with the same first and last names Middle Initial should only contains letters from A to Z		
Dependency	Middle initial must be >=0 or <=1 characters.		

SFI009 - (Gender)

Data Element	SFI009		
Description	Gender		
Definition	The student's gender. Not more than 5% should have unknown gender. Unknown should be used to report students for whom the institution does not know a gender. Institutions should report all students who do not self-report a gender (i.e., missing data) in this category. Another Gender should be used to report students for whom gender information is known but does not fall into either of the mutually exclusive binary categories provided [Male/Female]).		
Data Constraints		Data type	Numeric
Field size (Min Max)	1 1	Format/Layout	0
Acceptable Values	1 Male 2 Female 3 Unknown 4 Another Gender		
Business Rule	Mandatory entry Null values default to 3 - "Unknown"		
Dependency	Must be one of the values from Acceptable Values column. Not more than 5% should be Unknown.		

SFI010 - (Student's Race/Ethnicity)

Data Element	SFI010
Description	Student's Race/Ethnicity
Definition	The race and/or ethnicity of the student. This data element reflects either the student's racial/ethnic background or non-resident status. Students who do not report this information should be classified as "7" = Unknown. Students who report Hispanic/Latino of any race should be reported in only this category even if they report additional races in addition to their ethnicity. U.S. Non-residents should be identified as such and not assigned to any of the other categories. Racial/ethnic designations are requested only for United States citizens, residents, and other eligible non-citizens. Eligible noncitizens include all students who completed high school or a GED equivalency within the United States (including DACA and undocumented students) and who were not on an F-1 non-immigrant student visa at the time of high school graduation. More information about other eligible (for financial aid purposes) non-citizens is available at https://studentaid.gov/understand-aid/eligibility/requirements/non-us-citizens. Important Note: The Commonwealth of Massachusetts recognizes individuals with ancestry from Cape Verde as a distinct group. For HEIRS reporting purposes, Cape Verdeans are to be reported as a separate group. For IPEDS reporting these students should be reported as Black or African American. Hispanic or Latino A person of Cuban, Mexican, Puerto Rican, South or Central American, or other Spanish culture or origin, regardless of race. American Indian or Alaska Native A person having origins in any of the original peoples of North and

	South America (including Central America) who maintains cultural identification through tribal affiliation or community attachment. Asian A person having origins in any of the original peoples of the Far East, Southeast Asia, or the Indian Subcontinent, including, for example, Cambodia, China, India, Japan, Korea, Malaysia, Pakistan, the Philippine Islands, Thailand, and Vietnam. Black or African American A person having origins in any of the black racial groups of Africa. Cape Verdean A person having origins in any of the original peoples of Cape Verde. Native Hawaiian or Other Pacific Islander A person having origins in any of the original peoples of Hawaii, Guam, Samoa, or other Pacific Islands. White A person having origins in any of the original peoples of Europe, the Middle East, or North Africa. U.S Nonresident A person who is not a citizen or national of the United States and who is in this country on a visa or temporary basis and does not have the right to remain indefinitely. Do not include DACA, undocumented, or other eligible noncitizens in this category. Note: Nonresidents are to be reported separately in the places provided, rather than in any of the racial/ethnic categories described above. Eligible non-citizens Eligible noncitizens include all students who completed high school or a GED equivalency within the United States (including DACA and undocumented students) and who were not on an F-1 non-immigrant student visa at the time of high school graduation. More information about other eligible (for financial aid purposes) non-citizens is available at https://studentaid.gov/understand-aid/eligibility/requirements/non-us-citizens. Race/ethnicity unknown The category used to report students or employees whose race and ethnicity are not known. Instructions: Educational institutions will be required to report aggregated racial and ethnic data in seven categories:
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	Hispanic/Latino of any race For individuals who are non-Hispanic/Latino only American Indian or Alaska Native Asian Black or African American Native Hawaiian or Other Pacific Islander White Two or more races In Summary – For State Reporting – Cape Verdean is a separate subgroup of Black or African American and should be included in the Black or African American group for Federal (IPEDS) reporting. As taken from http://edocket.access.gpo.gov/2007/pdf/E7-20613.pdf Example 1: A respondent self-identifies as Hispanic/Latino and as Asian. This respondent is report only in the Hispanic/Latino category. Example 2: A respondent self-identifies as Hispanic/Latino and as Asian and Black or African American. This respondent is report only in the Hispanic/Latino category. Example 3: A respondent self-identifies as non-Hispanic/Latino and as Native Hawaiian or Other Pacific Islander. This respondent is reported in the Native Hawaiian or Other Pacific Islander category. Example 4: A respondent self-identifies as non-Hispanic/Latino and as American Indian or Alaska Native and White. This respondent is reported in the two or more races category.		
Data Constraints		Data type	Numeric
Field size (Min Max)	1 2	Format/Layout	1
Acceptable Values	1 U.S. Non-resident 2 Black or African American 3 American Indian or Alaska Native 5 Hispanic or Latino (of any race) 6 White		

	7 Race and Ethnicity Unknown 8 Cape Verdean 9 Two or more races 10 Asian 11 Native Hawaiian or Other Pacific Islander
Business Rule	Mandatory entry Null values default to 7 - "Unknown"
Dependency	Must be one of the values from Acceptable Values column. Not more than 10% should be Race and Ethnicity Unknown.

SFI011 - (Birth date)

Data Element	SFI011		
Description	Birth date		
Definition	The student's date of birth.		
Data Constraints		Data type	Numeric
Field size (Min Max)	8 8	Format/Layout	YYYYMMDD
Acceptable Values	Birth Year: YYYY Birth Month: MM Birth Day: DD		
Business Rule	If only birth year is available, use June 15th as the default. Format: YYYY0615 If only birth year and month are available, use the 15th, as the default. Format: YYYYMM15 If missing, leave the field blank.		
Dependency	Birth date must be in YYYYMMDD format. Must not be future date. Student ages < 95 and >= 12 are considered valid.		

SFI012 - (Economic Status Criteria)

Data Element	SFI012		
Description	Economic Status Criteria		
Definition	Indicates the campus criteria by which a student is identified as economically disadvantaged for the SUCCESS initiative. Classify a student based on your specific campus criteria for this indicator as related to the SUCCESS initiative. If economic status is not a campus-specific criteria for student eligibility for the SUCCESS initiative, please code student records as “6” for “Not applicable.” If economic status is a campus-specific criteria for student eligibility for the SUCCESS initiative but you do not know how students are identified, use code “5” for “Unknown.” Pell standard: Based on whether a student was awarded a federal Pell grant at any point during the reporting period. EFC standard: Based on a student’s Expected Family Contribution (EFC) [Note: EFC was replaced by the Student Aid Index (SAI) for the 2024-25 academic year due to the FAFSA Simplification Act] Income standard: Based on student’s family income as a percentage of the federal poverty level in relation to household size. SAI standard: Based on the calculated Student Aid Index (SAI) for a student. Financial aid officers use SAI values to create aid offers. Negative SAI values indicate higher financial need. Other standard: Based on some other standard to identify a student as economically disadvantaged.		
Data Constraints		Data type	Numeric
Field size (Min Max)	1 1	Format/Layout	0
Acceptable Values	1 Pell standard 2 EFC standard 3 Income standard 4 Other standard 5 Unknown		

	6 Not applicable 7 SAI standard
Business Rule	Mandatory entry
Dependency	Must be one of the values from Acceptable Values column.

SFI013 - (Economic Status)

Data Element	SFI013		
Description	Economic Status		
Definition	Identifies if a student is considered economically disadvantaged as defined by the campus for the SUCCESS initiative. Classify a student based on your specific campus criteria for this indicator as related to the SUCCESS initiative. This indicator would typically reflect how a student was classified when they first entered SUCCESS; updates are permitted (but not required) if student status changes during their involvement with SUCCESS. Note: If economic status is not a campus-specific criteria for student eligibility for the SUCCESS initiative, please code student records as “4” for “Not Reported.” However, if economic status is a campus-specific criteria for student eligibility for the SUCCESS initiative and there are students for whom you do not know their status in a given term, code as “3” for “Unknown.”		
Data Constraints		Data type	Numeric
Field size (Min Max)	1 1	Format/Layout	0
Acceptable Values	1 Yes 2 No 3 Unknown 4 Not Reported		
Business Rule	Mandatory entry		
Dependency	Must be one of the values from Acceptable Values column. If Economic Status Criteria (SFI012) = ‘5’ then must be ‘3’. If Economic Status Criteria (SFI012) = 6 then must be 4; cannot be 4 when SFI012 <> 6.		

SFI014 - (First-generation College Student Status Criteria)

Data Element	SFI014		
Description	First-generation College Student Status Criteria		
Definition	Indicates the campus criteria by which a student is identified as a first-generation college student for the SUCCESS initiative. Classify a student based on your specific campus criteria for this indicator as related to the SUCCESS initiative. If first-generation college student status is not a campus-specific criteria for student eligibility for the SUCCESS initiative, please code student records as “6” for “Not applicable.” If first-generation college student status is a campus-specific criteria for student eligibility for the SUCCESS initiative and you do not know how students are identified, use code “5” for “Unknown.” High school standard: Neither parent nor guardian has any postsecondary experience (i.e., has not attempted or earned any college credit). Two-year standard: Neither parent nor guardian has earned an associate degree or higher (but may have some postsecondary experience). Four-year standard: Neither parent nor guardian has earned a bachelor’s degree or higher (but may have some postsecondary experience). Other standard: Any other criteria used to classify a student as first-generation college.		
Data Constraints		Data type	Numeric
Field size (Min Max)	1 1	Format/Layout	0
Acceptable Values	1 High school standard 2 Two-year standard 3 Four-year standard 4 Other standard 5 Unknown 6 Not applicable		

Business Rule	Mandatory entry
Dependency	Must be one of the values from Acceptable Values column.

SFI015 - (First-generation College Student Status)

Data Element	SFI015		
Description	First-generation College Student Status		
Definition	Indicates if a student is a first-generation college student as defined by the campus for the SUCCESS initiative. Classify a student based on your specific campus criteria for this indicator as related to the SUCCESS initiative. This indicator would typically reflect how a student was classified when they first entered SUCCESS; updates are permitted (but not required) if student status changes during their involvement with SUCCESS. Note: If first-generation college student status is not a campus-specific criteria for student eligibility for the SUCCESS initiative, please code student records as “4” for “Not Reported.” If first gen status is a campus-specific criteria for student eligibility for the SUCCESS initiative and there are students for whom you do not know their status in a given term, code as “3” for “Unknown.”		
Data Constraints		Data type	Numeric
Field size (Min Max)	1 1	Format/Layout	0
Acceptable Values	1 Yes 2 No 3 Unknown 4 Not Reported		
Business Rule	Mandatory entry		
Dependency	Must be one of the values from Acceptable Values column. If First-generation College Student Status Criteria (SFI014) = '5' then must be '3'. If First-generation College Student Status Criteria (SFI014) = 6 then must be 4; cannot be 4 when SFI014 <> 6.		

SFI016 - (Date of Initial Entry as a Degree/Certificate Seeking Credit Student)

Data Element	SFI016		
Description	Date of Initial Entry as a Degree/Certificate Seeking Credit Student		
Definition	Date on which the student first enrolled at the institution as a degree/certificate seeking credit student. The date (month/year) that the student first enrolled at the college as a degree or certificate seeking credit student. Include students enrolled in transfer-prep programs (as defined in 34 CFR Student Assistance General Provisions, Section 668.8(b)(1)(ii)) who would be reported to IPEDS as degree/certificate-seeking students.		
Data Constraints		Data type	Numeric
Field size (Min Max)	6 6	Format/Layout	YYYYMM
Acceptable Values			
Business Rule	Mandatory entry		
Dependency	Future dates are invalid.		

SFI017 - (New Student Type at Initial Entry as a Degree/Certificate Seeking Student)

Data Element	SFI017		
Description	New Student Type at Initial Entry as a Degree/Certificate Seeking Student		
Definition	Student's status at the time they applied and were accepted for admission as a degree/certificate seeking credit student. This field captures student type at initial entry to the college regardless of whether they joined SUCCESS as a new or continuing student. First-Time Freshman: A new undergraduate student, either full-time or part-time, with no prior college attendance at institution or anywhere else Transfer Student: A degree/certificate seeking undergraduate student, with prior college attendance. Students are not required to transfer credits in order to be considered a transfer student in accordance with IPEDS definitions. Readmitted/Reactivated Student: An undergraduate student who returns to the college after a period of nonattendance and goes through a formal reapplication/readmission process. Non-degree Seeking Undergraduate Continuing Student: A student who initially had been enrolled as a credit student but who had not formerly matriculated into a degree/certificate program. This would be an enrolled student taking a few courses who decides to matriculate into a program. Undergraduate Seeking another Degree at the Same Level: A student enrolled in an undergraduate program, with a previous award at the same level.		
Data Constraints		Data type	Numeric
Field size (Min Max)	1 1	Format/Layout	1
Acceptable Values	See Data Dictionary Appendix G: New Student Type Codes 1 Undergraduate First-time Freshman 2 Undergraduate Transfer Student 3 Undergraduate Readmitted/Reactivated Student 4 Non-degree Seeking Undergraduate Continuing Student 8 Undergraduate Seeking another Degree at the Same Level		
Business Rule	Mandatory entry		

Dependency	Must be one of the values from Acceptable Values column.
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SFI018 - (SUCCESS Services – Discontinued)

Data Element	SFI018		
Description	SUCCESS Services – Discontinued		
Definition	Identifies students who engaged with SUCCESS Initiative-funded services in a term and the degree to which their engagement can be reported. For students who engaged with SUCCESS Initiative-funded services during a term, indicate the degree to which their engagement with specific services can be reported. For example, Institution A and Institution B both offer SUCCESS Initiative-funded coaching and case management services. Institution A tracks and can report student engagement with coaching and case management as distinct services. For an Institution A student who engaged with both coaching and case management in a term, this field would be coded as '1' for 'Engaged with SUCCESS services and at least some specific service engagement can be reported.' Alternatively, at Institution B, one staff member provides both coaching and case management services and the provision of these services is not distinctly tracked. For an Institution B student who engaged with services provided by the staff member, this field would be coded as '2' for 'Engaged with SUCCESS services but unable to report specific service engagement.' Code as '1' for students at institutions who engaged with some service activities that are tracked distinctly (e.g., peer mentoring) and others that are not (e.g., coaching and advising). If unable to report specific service engagement, the field can be left blank or equal to 2. Note: To be considered SUCCESS initiative-funded, the service should be: a) Funded at least in part by the SUCCESS appropriation, and b) Received by students as part of their participation in a SUCCESS program or activity.		
Data Constraints		Data type	Numeric
Field size (Min Max)	1 1	Format/Layout	0
Acceptable Values	1 Engaged with SUCCESS services and at least some specific service engagement can be		

	reported 2 Engaged with SUCCESS services but unable to report specific service engagement
Business Rule	Not Mandatory
Dependency	If field is left blank defaults to 2.

SFI019 - (Coaching)

Data Element	SFI019		
Description	Coaching		
Definition	Indicates whether the student received SUCCESS-funded coaching. Did the student receive SUCCESS initiative-funded coaching services? Coaching interactions tend to be exploratory in nature and focus on uncovering a student's short- and long-term goals and what success means to a particular student. Coaches help build student motivation and competency toward goal attainment. Specifically, coaching constitutes taking a supportive approach towards helping students to manage relationships and identify and plan towards their goals (e.g., career and personal goals). It typically involves a more collaborative exchange with a student where the student actively leads the discussion and makes sense of their experiences. Note: If these services were not offered as part of your campus-specific SUCCESS initiative during the reporting period, please code student records as 4 for "Not Applicable." However, if these services were part of your campus-specific SUCCESS initiative during the reporting period and there are students for whom you do not know about their engagement with the services in a given term, code as 3 for "Unknown." Note: To be considered SUCCESS initiative-funded, the service should be: c) Funded at least in part by the SUCCESS appropriation, and d) Received by students as part of their participation in a SUCCESS program or activity.		
Data Constraints		Data type	Numeric
Field size (Min Max)	1 1	Format/Layout	0
Acceptable Values	1 Yes 2 No 3 Unknown 4 Not Applicable		
Business Rule	Mandatory entry		

Dependency	
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SFI020 - (Advising)

Data Element	SFI020		
Description	Advising		
Definition	Indicates whether the student received SUCCESS-funded advising. Did the student receive SUCCESS initiative-funded advising services? Advising services received may entail the direct provision of personal, academic, career, and/or transfer support. Advising interactions often serve a specific, concrete student need and constitute an academic service, such as help choosing courses, registering for courses, withdrawing from courses, changing majors, forming a degree plan, and responding to any academic-type concern. Services may be provided one-on-one or in a group setting. Note: If these services were not offered as part of your campus-specific SUCCESS initiative during the reporting period, please code student records as 4 for “Not Applicable.” However, if these services were part of your campus-specific SUCCESS initiative during the reporting period and there are students for whom you do not know about their engagement with the services in a given term, code as 3 for “Unknown.” Note: To be considered SUCCESS initiative-funded, the service should be: a) Funded at least in part by the SUCCESS appropriation, and b) Received by students as part of their participation in a SUCCESS program or activity.		
Data Constraints		Data type	Numeric
Field size (Min Max)	1 1	Format/Layout	0
Acceptable Values	1 Yes 2 No 3 Unknown 4 Not Applicable		
Business Rule	Mandatory entry		
Dependency			

SFI021 - (Case Management)

Data Element	SFI021		
Description	Case Management		
Definition	Indicates whether the student received SUCCESS-funded case management. Did the student receive SUCCESS initiative-funded case management? Individuals providing case management typically act as liaisons to students by connecting them with needed services to help them succeed in their educational journey. Case management may include identifying student needs/goals, assisting students in academic planning, addressing student challenges/barriers to success, and providing referrals to relevant student support resources. Note: If this service was not offered as part of your campus-specific SUCCESS initiative during the reporting period, please code student records as 4 for “Not Applicable.” However, if this service was part of your campus-specific SUCCESS initiative during the reporting period and there are students for whom you do not know about their engagement with the service in a given term, code as 3 for “Unknown.” Note: To be considered SUCCESS initiative-funded, the service should be: a) Funded at least in part by the SUCCESS appropriation, and b) Received by students as part of their participation in a SUCCESS program or activity.		
Data Constraints		Data type	Numeric
Field size (Min Max)	1 1	Format/Layout	0
Acceptable Values	1 Yes 2 No 3 Unknown 4 Not Applicable		
Business Rule	Mandatory entry		
Dependency			

SFI022 - (Career Advising)

Data Element	SFI022		
Description	Career Advising		
Definition	Indicates whether the student received SUCCESS-funded career advising/counseling. Did the student receive SUCCESS initiative-funded career advising/counseling? Career advising/counseling services may be provided by an individual who provides broad advising support. These services may also be provided by an individual with specific expertise and focus in career matters. Services may be provided one-on-one or in a group setting. Note: If this service was not offered as part of your campus-specific SUCCESS initiative during the reporting period, please code student records as 4 for “Not Applicable.” However, if this service was part of your campus-specific SUCCESS initiative during the reporting period and there are students for whom you do not know about their engagement with the service in a given term, code as 3 for “Unknown.” Note: To be considered SUCCESS initiative-funded, the service should be: c) Funded at least in part by the SUCCESS appropriation, and d) Received by students as part of their participation in a SUCCESS program or activity.		
Data Constraints		Data type	Numeric
Field size (Min Max)	1 1	Format/Layout	0
Acceptable Values	1 Yes 2 No 3 Unknown 4 Not Applicable		
Business Rule	Mandatory entry		
Dependency			

SFI023 - (Transfer Advising)

Data Element	SFI023		
Description	Transfer Advising		
Definition	Indicates whether the student received SUCCESS-funded transfer advising/counseling. Did the student receive SUCCESS initiative-funded transfer advising/counseling? Transfer advising/counseling services may be provided by an individual who provides broad advising support. These services may also be provided by an individual with specific expertise and focus in transfer matters. Services may be provided one-on-one or in a group setting. Note: If this service was not offered as part of your campus-specific SUCCESS initiative during the reporting period, please code student records as 4 for “Not Applicable.” However, if this service was part of your campus-specific SUCCESS initiative during the reporting period and there are students for whom you do not know about their engagement with the service in a given term, code as 3 for “Unknown.” Note: To be considered SUCCESS initiative-funded, the service should be: a) Funded at least in part by the SUCCESS appropriation, and b) Received by students as part of their participation in a SUCCESS program or activity.		
Data Constraints		Data type	Numeric
Field size (Min Max)	1 1	Format/Layout	0
Acceptable Values	1 Yes 2 No 3 Unknown 4 Not Applicable		
Business Rule	Mandatory entry		
Dependency			

SFI024 - (Academic Support Workshops)

Data Element	SFI024		
Description	Academic Support Workshops		
Definition	Indicates whether the student participated in SUCCESS-funded academic support workshops. Did the student receive SUCCESS initiative-funded academic support through academic skills workshops (e.g., learning-to-learn, test taking strategies, study skills, reading strategies, presentation and/or writing skills, time management, note taking, goal setting)? Note: If these services were not offered as part of your campus-specific SUCCESS initiative during the reporting period, please code student records as 4 for “Not Applicable.” However, if these services were part of your campus-specific SUCCESS initiative during the reporting period and there are students for whom you do not know about their engagement with the services in a given term, code as 3 for “Unknown.” Note: To be considered SUCCESS initiative-funded, the service should be: a) Funded at least in part by the SUCCESS appropriation, and b) Received by students as part of their participation in a SUCCESS program or activity.		
Data Constraints		Data type	Numeric
Field size (Min Max)	1 1	Format/Layout	0
Acceptable Values	1 Yes 2 No 3 Unknown 4 Not Applicable		
Business Rule	Mandatory entry		
Dependency			

SFI025 - (Tutoring)

Data Element	SFI025		
Description	Tutoring		
Definition	Indicates whether the student participated in SUCCESS-funded tutoring. Did the student receive SUCCESS initiative-funded tutoring? Services may be provided one-on one or in a group setting. Note: If these services were not offered as part of your campus-specific SUCCESS initiative during the reporting period, please code student records as 4 for “Not Applicable.” However, if these services were part of your campus-specific SUCCESS initiative during the reporting period and there are students for whom you do not know about their engagement with the services in a given term, code as 3 for “Unknown.” Note: To be considered SUCCESS initiative-funded, the service should be: a) Funded at least in part by the SUCCESS appropriation, and b) Received by students as part of their participation in a SUCCESS program or activity.		
Data Constraints		Data type	Numeric
Field size (Min Max)	1 1	Format/Layout	0
Acceptable Values	1 Yes 2 No 3 Unknown 4 Not Applicable		
Business Rule	Mandatory entry		
Dependency			

SFI026 - (Mentoring Services)

Data Element	SFI026		
Description	Mentoring Services		
Definition	Indicates whether the student received SUCCESS-funded mentoring. Did the student receive SUCCESS initiative-funded mentoring services (including peer mentoring as well as mentoring by faculty or staff)? Note: If this service was not offered as part of your campus-specific SUCCESS initiative during the reporting period, please code student records as 4 for “Not Applicable.” However, if this service was part of your campus-specific SUCCESS initiative during the reporting period and there are students for whom you do not know about their engagement with the service in a given term, code as 3 for “Unknown.” Note: To be considered SUCCESS initiative-funded, the service should be: a) Funded at least in part by the SUCCESS appropriation, and b) Received by students as part of their participation in a SUCCESS program or activity.		
Data Constraints		Data type	Numeric
Field size (Min Max)	1 1	Format/Layout	0
Acceptable Values	1 Yes 2 No 3 Unknown 4 Not Applicable		
Business Rule	Mandatory entry		
Dependency			

SFI027 - (Other Services)

Data Element	SFI027		
Description	Other Services		
Definition	Indicates whether the student received additional SUCCESS-funded services not covered in other fields. Did the student receive SUCCESS initiative-funded services not covered in other fields (e.g., field trips to four-year institutions, cultural enrichment trips, mental health counseling)? [Please report summer bridge and related services under SFI042 (SUCCESS Bridge Services) rather than this indicator]. Note: If other services were not offered as part of your campus-specific SUCCESS initiative during the reporting period, please code student records as 4 for "Not Applicable." However, if other services were part of your campus-specific SUCCESS initiative during the reporting period and there are students for whom you do not know about their engagement with the services in a given term, code as 3 for "Unknown." Note: To be considered SUCCESS initiative-funded, the service should be: a) Funded at least in part by the SUCCESS appropriation, and b) Received by students as part of their participation in a SUCCESS program or activity.		
Data Constraints		Data type	Numeric
Field size (Min Max)	1 1	Format/Layout	0
Acceptable Values	1 Yes 2 No 3 Unknown 4 Not Applicable		
Business Rule	Mandatory entry		
Dependency			

SFI028 - (Intensity of Service Engagement - Optional)

Data Element	SFI028		
Description	Intensity of Service Engagement - Optional		
Definition	Indicates the intensity of engagement with SUCCESS services. Determination of how much the student engaged in SUCCESS initiative-funded programs, services, or events. The definition of a “meaningful interaction” may vary according to the campus context and how SUCCESS is operationalized at an institution (e.g., at one institution, multiple back-and-forth emails between a student and their SUCCESS coach on a specific topic during a given week may be coded as one meaningful interaction). Institutions are strongly encouraged to have decision rules in place for tracking engagement. In all cases, what counts as a meaningful interaction should involve some engagement and action on the part of the student (e.g., formulating a success plan during a meeting with a coach, attending a workshop, getting assistance from a tutor). For example, a student would be coded as “Tier 2” in a given term if they met with their SUCCESS coach twice and attended an academic skills workshop. Note: To be considered SUCCESS Initiative-funded, the service should be: a) Funded at least in part by the SUCCESS appropriation, and b) Received by students as part of their participation in a SUCCESS program or activity.		
Data Constraints		Data type	Numeric
Field size (Min Max)	1 1	Format/Layout	0
Acceptable Values	1 Tier 1: Student had 1 meaningful interaction with a SUCCESS service or program 2 Tier 2: Student had 2-4 meaningful interactions with SUCCESS services/programs 3 Tier 3: Student had 5 or more meaningful interactions with SUCCESS services/programs 4 Unknown		
Business Rule			

Dependency	
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SFI029 - (Coaching Interactions)

Data Element	SFI029		
Description	Coaching Interactions		
Definition	Indicates the number of times a student engaged with SUCCESS-funded coaching . Please indicate the number of times a student received SUCCESS initiative-funded coaching services each term. Coaching interactions tend to be exploratory in nature and focus on uncovering a student's short- and long-term goals and what success means to a particular student. Coaches help build student motivation and competency toward goal attainment. Specifically, coaching constitutes taking a supportive approach towards helping students to manage relationships and identify and plan towards their goals (e.g., career and personal goals). It typically involves a more collaborative exchange with a student where the student actively leads the discussion and makes sense of their experiences. Note: If these services were not offered as part of your campus-specific SUCCESS initiative during the reporting period, or if these services were part of your campus-specific SUCCESS initiative during the reporting period and there are students for whom you do not know about their engagement with the services in a given term, please leave blank. Note: To be considered SUCCESS initiative-funded, the service should be: e) Funded at least in part by the SUCCESS appropriation, and f) Received by students as part of their participation in a SUCCESS program or activity.		
Data Constraints		Data type	Numeric
Field size (Min Max)	1 6	Format/Layout	7
Acceptable Values			
Business Rule	Mandatory entry		

Dependency	If Coaching (SFI019) = 3 (Unknown) or 4 (Not Applicable) then must be null. If Coaching (SFI019) = 1 (Yes) must be > 0; If Coaching (SFI019) = 2 (No) must be 0.
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SFI030 - (Advising Interactions)

Data Element	SFI030		
Description	Advising Interactions		
Definition	Indicates the number of times a student engaged with SUCCESS-funded advising. Please indicate the number of times a student received SUCCESS initiative-funded advising services each term. Advising services received may entail the direct provision of personal, academic, career, and/or transfer support. Advising interactions often serve a specific, concrete student need and constitute an academic service, such as help choosing courses, registering for courses, withdrawing from courses, changing majors, forming a degree plan, and responding to any academic-type concern. Services may be provided one-on-one or in a group setting. Note: If these services were not offered as part of your campus-specific SUCCESS initiative during the reporting period, or if these services were part of your campus-specific SUCCESS initiative during the reporting period and there are students for whom you do not know about their engagement with the services in a given term, please leave blank. Note: To be considered SUCCESS initiative-funded, the service should be: c) Funded at least in part by the SUCCESS appropriation, and d) Received by students as part of their participation in a SUCCESS program or activity.		
Data Constraints		Data type	Numeric
Field size (Min Max)	1 6	Format/Layout	7
Acceptable Values			
Business Rule	Mandatory entry		
Dependency	If Advising (SFI020) = 3 (Unknown) or 4 (Not Applicable) then must be null. If Advising (SFI020) = 1 (Yes) must be > 0; If Advising (SFI020) = 2 (No) must be 0.		

SFI031 - (Career Advising Interactions)

Data Element	SFI031		
Description	Career Advising Interactions		
Definition	Indicates the number of times a student engaged with SUCCESS-funded career advising/counseling. Please indicate the number of times a student received SUCCESS initiative-funded career advising/counseling each term. Career advising/counseling services may be provided by an individual who provides broad advising support. These services may also be provided by an individual with specific expertise and focus in career matters. Services may be provided one-on-one or in a group setting. Note: If this service was not offered as part of your campus-specific SUCCESS initiative during the reporting period, or if this service was part of your campus-specific SUCCESS initiative during the reporting period and there are students for whom you do not know about their engagement with the service in a given term, please leave blank. Note: To be considered SUCCESS initiative-funded, the service should be: e) Funded at least in part by the SUCCESS appropriation, and f) Received by students as part of their participation in a SUCCESS program or activity.		
Data Constraints		Data type	Numeric
Field size (Min Max)	1 6	Format/Layout	7
Acceptable Values			
Business Rule	Mandatory entry		
Dependency	If Career Advising (SFI022) = 3 (Unknown) or 4 (Not Applicable) then must be null. If Career Advising (SFI022) = 1 (Yes) must be > 0; If Career Advising (SFI022) = 2 (No) must be 0.		

SFI032 - (Transfer Advising Interactions)

Data Element	SFI032		
Description	Transfer Advising Interactions		
Definition	Indicates the number of times a student engaged with SUCCESS-funded transfer advising/counseling. Please indicate the number of times a student received SUCCESS initiative-funded transfer advising/counseling each term. Transfer advising/counseling services may be provided by an individual who provides broad advising support. These services may also be provided by an individual with specific expertise and focus in transfer matters. Services may be provided one on-one or in a group setting. Note: If this service was not offered as part of your campus-specific SUCCESS initiative during the reporting period, or if this service was part of your campus-specific SUCCESS initiative during the reporting period and there are students for whom you do not know about their engagement with the service in a given term, please leave blank. Note: To be considered SUCCESS initiative-funded, the service should be: c) Funded at least in part by the SUCCESS appropriation, and d) Received by students as part of their participation in a SUCCESS program or activity.		
Data Constraints		Data type	Numeric
Field size (Min Max)	1 6	Format/Layout	7
Acceptable Values			
Business Rule	Mandatory entry		
Dependency	If Transfer Advising (SFI023) = 3 (Unknown) or 4 (Not Applicable) then must be null. If Transfer Advising (SFI023) = 1 (Yes) must be > 0; If Transfer Advising (SFI023) = 2 (No) must be 0.		

SFI033 - (Academic Support Workshop Interactions)

Data Element	SFI033		
Description	Academic Support Workshop Interactions		
Definition	Indicates the number of times a student participated in SUCCESS-funded academic support workshops. Please indicate the number of times each term a student received SUCCESS initiative-funded academic support through academic skills workshops (e.g., learning-to-learn, test taking strategies, study skills, reading strategies, presentation and/or writing skills, time management, note taking, goal setting). Note: If these services were not offered as part of your campus-specific SUCCESS initiative during the reporting period, or if these services were part of your campus-specific SUCCESS initiative during the reporting period and there are students for whom you do not know about their engagement with the services in a given term, please leave blank. Note: To be considered SUCCESS initiative-funded, the service should be: c) Funded at least in part by the SUCCESS appropriation, and d) Received by students as part of their participation in a SUCCESS program or activity.		
Data Constraints		Data type	Numeric
Field size (Min Max)	1 6	Format/Layout	7
Acceptable Values			
Business Rule	Mandatory entry		
Dependency	If Academic Support Workshops (SFI024) = 3 (Unknown) or 4 (Not Applicable) then must be null. If Academic Support Workshops (SFI024) = 1 (Yes) must be > 0; If Academic Support Workshops (SFI024) = 2 (No) must be 0.		

SFI034 - (Tutoring Interactions)

Data Element	SFI034		
Description	Tutoring Interactions		
Definition	Indicates the number of times a student participated in SUCCESS-funded tutoring. Please indicate the number of times a student received SUCCESS initiative-funded tutoring each term. Services may be provided one-on-one or in a group setting. Note: If these services were not offered as part of your campus-specific SUCCESS initiative during the reporting period, or if these services were part of your campus-specific SUCCESS initiative during the reporting period and there are students for whom you do not know about their engagement with the services in a given term, please leave blank. Note: To be considered SUCCESS initiative-funded, the service should be: c) Funded at least in part by the SUCCESS appropriation, and d) Received by students as part of their participation in a SUCCESS program or activity.		
Data Constraints		Data type	Numeric
Field size (Min Max)	1 6	Format/Layout	7
Acceptable Values			
Business Rule	Mandatory entry		
Dependency	If Tutoring (SFI025) = 3 (Unknown) or 4 (Not Applicable) then must be null. If Tutoring (SFI025) = 1 (Yes) must be > 0; If Tutoring (SFI025) = 2 (No) must be 0.		

SFI035 - (Mentoring Services Interactions)

Data Element	SFI035		
Description	Mentoring Services Interactions		
Definition	Indicates the number of times a student received SUCCESS-funded mentoring. Please indicate the number of times a student received SUCCESS initiative-funded mentoring services each term (including peer mentoring as well as mentoring by faculty or staff). Note: If this service was not offered as part of your campus-specific SUCCESS initiative during the reporting period, or if this service was part of your campus-specific SUCCESS initiative during the reporting period and there are students for whom you do not know about their engagement with the service in a given term, please leave blank. Note: To be considered SUCCESS initiative-funded, the service should be: c) Funded at least in part by the SUCCESS appropriation, and d) Received by students as part of their participation in a SUCCESS program or activity.		
Data Constraints		Data type	Numeric
Field size (Min Max)	1 6	Format/Layout	7
Acceptable Values			
Business Rule	Mandatory entry		
Dependency	If Mentoring Services (SFI026) = 3 (Unknown) or 4 (Not Applicable) then must be null. If Mentoring Services (SFI026) = 1 (Yes) must be > 0; If Mentoring Services (SFI026) = 2 (No) must be 0.		

SFI036 - (Other Services Interactions)

Data Element	SFI036		
Description	Other Services Interactions		
Definition	Indicates the number of times a student received additional SUCCESS-funded services not covered in other fields. Please indicate the number of times each term a student received SUCCESS initiative-funded services not covered in other fields (e.g., field trips to four-year institutions, cultural enrichment trips, mental health counseling). [Please report summer bridge and related services under SFI042 (SUCCESS Bridge Services) rather than this indicator]. Note: If other services were not offered as part of your campus-specific SUCCESS initiative during the reporting period, or if other services were part of your campus-specific SUCCESS initiative during the reporting period and there are students for whom you do not know about their engagement with the services in a given term, please leave blank. Note: To be considered SUCCESS initiative-funded, the service should be: c) Funded at least in part by the SUCCESS appropriation, and d) Received by students as part of their participation in a SUCCESS program or activity.		
Data Constraints		Data type	Numeric
Field size (Min Max)	1 6	Format/Layout	7
Acceptable Values			
Business Rule	Mandatory entry		
Dependency	If Other Services (SFI027) = 3 (Unknown) or 4 (Not Applicable) then must be null. If Other Services (SFI027) = 1 (Yes) must be > 0; If Other Services (SFI027) = 2 (No) must be 0.		

SFI037 - (Financial Counseling)

Data Element	SFI037		
Description	Financial Counseling		
Definition	Indicates whether a student received SUCCESS-funded financial counseling. Did the student receive SUCCESS initiative-funded financial counseling services? These services typically help students to build personal financial understanding and responsibility. They may entail the creation of a personal financial plan to reach desired financial goals. Services may also include financial coaching and/or workshops to provide guidance in navigating higher education finances and repayment (including assistance with FAFSA completion) as well as general strategies for budgeting, saving, and reducing debt. Counseling may be provided one-on-one or in a group setting. It may or may not be provided by a dedicated counselor or similar individual. Note: If these services were not offered as part of your campus-specific SUCCESS initiative during the reporting period, please code student records as 4 for “Not Applicable.” However, if these services were part of your campus-specific SUCCESS initiative during the reporting period and there are students for whom you do not know about their engagement with the services in a given term, code as 3 for “Unknown.” Note: To be considered SUCCESS initiative-funded, the service should be: a) Funded at least in part by the SUCCESS appropriation, and b) Received by students as part of their participation in a SUCCESS program or activity.		
Data Constraints		Data type	Numeric
Field size (Min Max)	1 1	Format/Layout	0
Acceptable Values	1 Yes 2 No 3 Unknown 4 Not Applicable		
Business Rule	Mandatory entry		

Dependency	
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SFI038 - (Financial Counseling Interactions)

Data Element	SFI038		
Description	Financial Counseling Interactions		
Definition	Indicates the number of times a student received SUCCESS-funded financial counseling. Please indicate the number of times a student received SUCCESS initiative-funded financial counseling services each term. These services typically help students to build personal financial understanding and responsibility. They may entail the creation of a personal financial plan to reach desired financial goals. Services may also include financial coaching and/or workshops to provide guidance in navigating higher education finances and repayment (including assistance with FAFSA completion) as well as general strategies for budgeting, saving, and reducing debt. Counseling may be provided one-on-one or in a group setting. It may or may not be provided by a dedicated counselor or similar individual. Note: If these services were not offered as part of your campus-specific SUCCESS initiative during the reporting period, or if these services were part of your campus-specific SUCCESS initiative during the reporting period and there are students for whom you do not know about their engagement with the services in a given term, please leave blank. Note: To be considered SUCCESS initiative-funded, the service should be: c) Funded at least in part by the SUCCESS appropriation, and d) Received by students as part of their participation in a SUCCESS program or activity.		
Data Constraints		Data type	Numeric
Field size (Min Max)	1 6	Format/Layout	7
Acceptable Values			
Business Rule	Mandatory entry		

Dependency	If Financial Counseling (SFI037) = 3 (Unknown) or 4 (Not Applicable) then must be null. If Financial Counseling (SFI037) = 1 (Yes) must be > 0; If Financial Counseling (SFI037) = 2 (No) must be 0
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SFI039 - (Basic Needs Counseling)

Data Element	SFI039		
Description	Basic Needs Counseling		
Definition	Indicates whether a student received SUCCESS-funded basic needs counseling. Please indicate whether a student received SUCCESS initiative-funded basic needs counseling. Basic needs counseling typically serves to help students gain awareness of resources available to them (e.g., housing and/or food assistance, transportation assistance, childcare assistance, mental health/wellness support) and any related eligibility requirements for receipt of those resources. Services may also include assistance with applying for resources. Counseling may be provided one-on-one or in a group setting. It may or may not be provided by a dedicated basic needs counselor, navigator, coordinator, or similar individual. Note: If these services were not offered as part of your campus-specific SUCCESS initiative during the reporting period, please code student records as 4 for “Not Applicable.” However, if these services were part of your campus-specific SUCCESS initiative during the reporting period and there are students for whom you do not know about their engagement with the services in a given term, code as 3 for “Unknown.” Note: To be considered SUCCESS initiative-funded, the service should be: a) Funded at least in part by the SUCCESS appropriation, and b) Received by students as part of their participation in a SUCCESS program or activity.		
Data Constraints		Data type	Numeric
Field size (Min Max)	1 1	Format/Layout	0
Acceptable Values	1 Yes 2 No 3 Unknown 4 Not Applicable		
Business Rule	Mandatory entry		

Dependency	
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SFI040 - (Basic Needs Counseling Interactions)

Data Element	SFI040		
Description	Basic Needs Counseling Interactions		
Definition	Indicates the number of times a student received SUCCESS-funded basic needs counseling. Please indicate the number of times a student received SUCCESS initiative-funded basic needs counseling each term. Basic needs counseling typically serves to help students gain awareness of resources available to them (e.g., housing and/or food assistance, transportation assistance, childcare assistance, mental health/wellness support) and any related eligibility requirements for receipt of those resources. Services may also include assistance with applying for resources. Counseling may be provided one-on-one or in a group setting. It may or may not be provided by a dedicated basic needs counselor, navigator, coordinator, or similar individual. Note: If these services were not offered as part of your campus-specific SUCCESS initiative during the reporting period, or if these services were part of your campus-specific SUCCESS initiative during the reporting period and there are students for whom you do not know about their engagement with the services in a given term, please leave blank. Note: To be considered SUCCESS initiative-funded, the service should be: c) Funded at least in part by the SUCCESS appropriation, and d) Received by students as part of their participation in a SUCCESS program or activity.		
Data Constraints		Data type	Numeric
Field size (Min Max)	1 6	Format/Layout	7
Acceptable Values			
Business Rule	Mandatory entry		
Dependency	If Basic Needs Counseling (SFI039) = 3 (Unknown) or 4 (Not Applicable) then must be null. If Basic Needs Counseling (SFI039) = 1 (Yes) must be > 0; If Basic Needs Counseling (SFI039) = 2 (No) must be 0		

SFI041 - (Student Support Interventions – Discontinued)

Data Element	SFI041		
Description	Student Support Interventions – Discontinued		
Definition	Indicates the number of SUCCESS-funded student support interventions a student received. In all cases, what is counted should reflect a meaningful interaction, which is one that involves some engagement and action on the part of the student (e.g., formulating a success plan with an advisor/coach). Based on recommendations from a 2021 guide detailing effective advising for postsecondary students, student support interventions should be comprehensive, holistic, and focused on the individual needs of each student (both academic and non-academic). Face-to-face meetings are more helpful than other modes of communication (e.g., emails, texts) because they allow for greater support, encouragement, and opportunity to work through complex activities (e.g., goal setting, career plans, roadblocks to success). Additionally, relationship-building is key to effective student support interventions. Therefore, while email, snail mail, or text exchanges might be used to deliver other services and/or remind students of upcoming appointments, action items, etc., the preferred mode for delivering a student support intervention by a SUCCESS staff member (e.g., an advisor, coach, advisor/coach, counselor, mentor) is a one-on-one meeting that is held either in person or remotely (e.g., via Zoom, Skype, or WebEx). Multiple SUCCESSfunded services may occur over the course of one student support intervention (e.g., an hour-long meeting with a SUCCESS staff member where academic advising and transfer counseling both occur would reflect one student support intervention during which two services were provided). Note: To be considered SUCCESS Initiative-funded, the service should be: a) Funded at least in part by the SUCCESS appropriation, and b) Received by students as part of their participation in a SUCCESS program or activity.		
Data Constraints		Data type	Numeric
Field size (Min Max)	1 6	Format/Layout	13

Acceptable Values	Represents the number of SUCCESS initiative-funded student support interventions per term. It is strongly recommended (but not required) that there be at least two interventions per full term, which for a student enrolled the entire program year would equate to at least four interventions during the year. To be included in the HEIRS SUCCESS Fund Initiative participants collection, a student should have experienced at least one student support intervention over the program year. 999 = Student Exclusion (i.e., for students whose interventions occur outside of SUCCESS, such as students who must be advised by instructors within their academic programs (e.g., nursing students who are advised by faculty in their discipline)).
Business Rule	
Dependency	

SFI042 - (SUCCESS Bridge Services)

Data Element	SFI042		
Description	SUCCESS Bridge Services		
Definition	Indicates whether the student received SUCCESS-funded services prior to matriculation. Did the student receive any SUCCESS initiative-funded services prior to matriculating and formally joining a SUCCESS cohort? For example, this may include students who received advising in the spring term prior to matriculating the following fall. This may also include students who participated in a formal SUCCESS summer bridge program prior to the reporting year. Coding Guidelines • Please report all students who received SUCCESS initiative-funded bridge services as 1 for “Yes” for every term in which they are included in the collection. • Report 2 for “No” for every term in which a student is included in the collection when a student did not receive SUCCESS initiative-funded bridge services that were available through the college. • If this service was part of your campus-specific SUCCESS initiative and there are SUCCESS students for whom you do not know about their engagement with the service, code as 3 for “Unknown” for every term in which the student is included in the collection. • If this service was not offered to a student as part of your campus-specific SUCCESS initiative, please code student records as 4 for “Not Applicable” for every term in which they are included in the collection. • Bridge services initiated during the Summer II term for participants who matriculate and enroll in courses in a subsequent term of the reporting year should be captured within the relevant service fields instead of SFI042. Note: To be considered SUCCESS initiative-funded, the service should be: a) Funded at least in part by the SUCCESS appropriation, and b) Received by students as part of their participation in a SUCCESS program or activity.		
Data Constraints		Data type	Numeric
Field size (Min 	1 1	Format/Layout	0

Max)			
Acceptable Values	1 Yes 2 No 3 Unknown 4 Not Applicable		
Business Rule	Mandatory entry		
Dependency	Must be the same value for all terms for the same student in the submitted file.		

SFI043 - (SUCCESS Participant Type)

Data Element	SFI043		
Description	SUCCESS Participant Type		
Definition	Indicates the participant as a new or continuing SUCCESS cohort student for the program year. Participant type categorizes a student in the program year as a new or continuing SUCCESS cohort student. “New” participants are those who first engaged with SUCCESS during the current program year; as such, the current collection is the first record of their engagement with SUCCESS. “Continuing” participants are those who first engaged with SUCCESS during any prior program year and also engaged with SUCCESS during the current program year; they would have first appeared in a program year participants collection that predates the current collection. Note: Report prior program year participants as “continuing” even if they stop out of the institution or SUCCESS and later return to be served by the initiative again.		
Data Constraints		Data type	Numeric
Field size (Min Max)	1 1	Format/Layout	1
Acceptable Values	1 New participant 2 Continuing participant		
Business Rule	Mandatory entry		
Dependency	Must be the same value for all terms for the same student in the submitted file.		

SFI044 - (Additional Student Support)

Data Element	SFI044		
Description	Additional Student Support		
Definition	Indicates whether the participant engaged with other wraparound student support programs during the year. This field identifies whether a SUCCESS participant engaged with other established wraparound student support programs, such as STEM Starter Academy or TRIO, in addition to SUCCESS at any point during the program year of the collection. “Duplication of services” means the participant benefited from at least some of the same services as those provided to the student by SUCCESS while simultaneously engaged with other wraparound student support program(s). Coding Guidelines • Please use the same code for every term in which a student is included in the collection. This field reflects whether a student received additional support at any point during the program year rather than during a specific term. • Use code 4 (“Did not receive additional support”) if your SUCCESS program does not actively allow participants to be served by other student support programs. • If at any time during the program year a SUCCESS participant received the same services from another established support program and SUCCESS concurrently, then report 2 for “Received support with at least some duplication of services.” • If a SUCCESS participant received the same services from SUCCESS and another established support program but at different points during the program year, then report 1 for “Received support without any duplication of services” (e.g., a student who received tutoring from TRIO in the fall term and from SUCCESS in the spring term). Note: To be considered SUCCESS Initiative-funded, the service should be: a) Funded at least in part by the SUCCESS appropriation, and b) Received by students as part of their participation in a SUCCESS program or activity		
Data Constraints		Data type	Numeric

Field size (Min Max)	1 1	Format/Layout	1
Acceptable Values	1 Received support without any duplication of services 2 Received support with at least some duplication of services 3 Received support but unknown if duplication of services occurred 4 Did not receive additional support 5 Unknown whether additional support was received		
Business Rule	Mandatory entry		
Dependency	Must be the same value for all terms for the same student in the submitted file.		

SFI045 - (Student Support Interventions 2.0 - New)

Data Element	SFI045
Description	Student Support Interventions 2.0 - New
Definition	Indicates the number of SUCCESS-funded student support interventions a student received. A student support intervention is delivered in-person, virtually, by phone, or via email. It includes substantive conversation or planning between the student and a SUCCESS staff member. It should involve active student engagement and result in either shared information, goal-setting, planning, decision-making, or support navigation. Group sessions can count if they meet these standards. Interventions should be intentional and document modality and service type(s). Examples of student support interventions: • A 30-minute check-in to revise an academic plan. • A group workshop on financial literacy or career planning. • A phone call where an advisor helps a student troubleshoot a scheduling issue. • A Zoom meeting that includes motivational coaching. • An in-person mentoring meeting to talk through a success plan • A formal summer orientation program for new students held in July or August (i.e., Summer II; see also coding guidelines for SFI042). • An email exchange between a student and their SUCCESS coach concerning help with waiving health insurance in which the coach replied with step-by-step instructions and provided additional guidance in response to follow up questions from the student (this back-and-forth exchange was documented as a coaching interaction). In all cases, what is counted should reflect one or more meaningful interactions, which involve some engagement and action on the part of a student. Additionally, relationship-building is key to effective student support interventions. Therefore, while snail mail or text exchanges might be used to deliver other services and/or remind students of upcoming appointments, action items, etc., student support interventions should take place in person, via a phone call, or remotely (e.g., via Zoom, Skype, or WebEx). Email exchanges between a SUCCESS participant and at least one SUCCESS staff member may also be counted as a student support intervention if they are documented and documentation supports that some type of meaningful interaction has taken place. Multiple SUCCESS-funded services may occur over the course of one

	student support intervention (e.g., an hour-long meeting with a SUCCESS staff member where academic advising and transfer counseling both occur would reflect one student support intervention during which two service interactions occurred). Note: To be considered SUCCESS Initiative-funded, the service should be: a) Funded at least in part by the SUCCESS appropriation, and b) Received by students as part of their participation in a SUCCESS program or activity.		
Data Constraints		Data type	Numeric
Field size (Min Max)	1 6	Format/Layout	13
Acceptable Values	Represents the number of SUCCESS initiative-funded student support interventions per term. Participants must have experienced at a minimum one intervention during the program year to be included in the submission; however, the expectation is for participants to have at least three interventions per program year. Students should still be included in the HEIRS SUCCESS Fund Initiative participants collection if they do not have the expected three interventions, but they may be excluded from official reporting statistics and/or categorized as a “low engagement” participant.		
Business Rule	Mandatory entry. Must be ≥ 1 .		
Dependency			