Welcome

**BEST PRACTICES IN P20W EDUCATION DATA SYSTEMS**

**GLOBAL + MOBILITY = GLOBILITY**

**APRIL 13-15, 2016**

**EMBASSY ROW HOTEL**

**WASHINGTON, D.C. 20036**

**ANNUAL SPRING DATA SUMMITS**

Focus on access, integration & implementation of data systems; maintenance & portability of data exchange standards; open, community-driven innovation & development of technology; mobility & overall interoperability; & other key factors that drive global education data systems development & technology.

**PESC AND ITS MEMBERSHIP**

Lead transparent, collaborative development across P20W Education. Supporting this mission are PESC partners the AACRAO SPEEDE Committee, the Groningen Declaration Network, the Common Education Data Standards (CEDS) Initiative, InCommon/Internet2 & the U.S. Department of Education. PESC is sponsored annually by Credentials Solutions, National Student Clearinghouse, Oracle, Parchment and USA Funds.

**ACTIVATING INTEROPERABILITY ACROSS THE EDUCATION LIFECYCLE**
## Program at-a Glance

All General and Concurrent Summit Sessions and events are open to all registered attendees. Note that General Sessions are presented in typical conference format in which featured speakers present on a certain topic followed by brief Q&A; while Concurrent Sessions follow a more informal workshop format in which group members roll up their sleeves, discuss & interact in more detail in order to advance the group activities & maximize in-person convening time.

<table>
<thead>
<tr>
<th>Program</th>
<th>Wednesday April 13, 2016</th>
<th>Thursday April 14, 2016</th>
<th>Friday April 15, 2016</th>
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<tr>
<td>7:30am – 5:00pm</td>
<td>Registration</td>
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<tr>
<td>7:30am – 9:00am</td>
<td>Continential Breakfast</td>
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<tr>
<td><strong>Schedule</strong></td>
<td><strong>General Sessions</strong></td>
<td><strong>Concurrent Sessions</strong></td>
<td><strong>Concurrent Sessions</strong></td>
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<td>Room</td>
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<tr>
<td>8:30am – 9:15am</td>
<td>Welcome International Interoperability: Launch of PESC’s Global Data Mobility User Group</td>
<td>Common Data Services Task Force &amp; EdExchange</td>
<td>Change Control Board &amp; Technical Advisory Board</td>
</tr>
<tr>
<td>9:15am – 10:00am</td>
<td>Powering Portability: EdExchange Launch — powered by the Common Data Services Task Force</td>
<td></td>
<td>Global Data Mobility User Group I Launch</td>
</tr>
<tr>
<td>10:00am – 10:30am</td>
<td>Break</td>
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</tr>
<tr>
<td>Noon – 1:30pm</td>
<td>Lunch</td>
<td>Seal of Approval Board</td>
<td>Global Data Mobility User Group II International School Code List</td>
</tr>
<tr>
<td>Noon – 1:30pm</td>
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<tr>
<td>1:30pm – 3:00pm</td>
<td>Demystifying the Digital Divide: Student Behavioral Impact on Global Digitalization — 5th Anniversary of the Groningen Declaration Network</td>
<td>AACRAO SPEEDE Committee</td>
<td>Academic Credentialing &amp; Experiential Learning Task Force</td>
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<td>3:00pm – 3:30pm</td>
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<td>EA2 Task Force &amp; COMMIT</td>
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<tr>
<td>3:30pm – 5:00pm</td>
<td>Evolution of Data Records Management for Credentialing &amp; Experiential Learning — Part 2</td>
<td>Coffee &amp; Dessert Networking</td>
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<tr>
<td>5:00pm – 6:00pm</td>
<td>Annual PESC Member Meeting</td>
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<td>6:00pm – 7:00pm</td>
<td>Annual Spring Reception</td>
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**International Interoperability: Launch of PESC’s Global Data Mobility User Group**

**8:30 AM – 9:15 AM**

**Moderator:** Doug Falk, CIO, National Student Clearinghouse

**Panelists:**
- Rick Skeel, Director of Product Development, Ellucian
- Jim Kelly, Sr. Director of Technology, Educational Credential Evaluators (ECE)
- Dave Landry, Director of Data Exchange Services, National Student Clearinghouse

With a now common global awareness around systems, technology and standards, PESC’s footprint is correspondingly growing. PESC’s Membership is expanding beyond North America and PESC Members are rapidly implementing PESC Approved Standards in order to meet the needs of this growing digital economy. New development ideas continue to grow within PESC as well, and the Board of Directors and Membership have been strategizing on how to meet this need.

We are now pleased to introduce the launch of PESC’s latest initiative - GLOBAL DATA MOBILITY User Group. Like the Education Record User Group, which governs all admissions and registrar PESC Approved Standards, and the Canadian PESC User Group, which is coordinating interoperability for Canada using PESC Approved Standards, and the Common Identity and Trust (CommIT) User Group, which is developing standards and protocols for cyber authentication, the GLOBAL DATA MOBILITY User Group will have a specific focus and purpose.

Together along with volunteer representatives from other PESC Member organizations, the GLOBAL DATA MOBILITY User Group will serve as hands-on experts and data users across all of education to identify new development ideas, standards, tools and resources to ensure PESC, its Members, PESC Approved Standards and the education community at-large can meet the demands on this growing digital economy.

The GLOBAL DATA MOBILITY User Group is already lined up to begin work on its first deliverable - an International School Code List and this topic will serve as the agenda for part of the concurrent session. Leaders within PESC and the education community have been discussing this need for a number of years. Today’s technological innovation with open, transparent collaboration (the cornerstone of PESC’s foundation and guiding principle) and finally having reached the tipping point whereby most experts agree that such a list is not only needed but potentially impacts data quality, enable this goal and we are pleased and excited to host this initiative.

**Powering Portability: EdExchange Launch powered by the Common Data Services Task Force**

**9:15 AM – 10:00 AM**

**Moderator:** Tuan Anh Do, Director of Enrollment Management Technology, San Francisco State University

**Panelists:**
- Lou Delzompo, CTO, California Community Colleges Technology Center
- Mark Cohen, Project Manager, California Community Colleges Technology Center

In December 2011 PESC created the Common Data Services (CDS) Task Force with the mission to improve security, reliability, efficiency and speed in the transfer of education data. Leaders within the California Community College System requested this community development and service through PESC and submitted a formal, open Letter of Intent. After several years of analysis and planning to ensure alignment & interoperation with all other community-based initiatives, CDS is formally announcing, EdExchange.

EdExchange is a data exchange platform that enables the electronic exchange of standards-based data and digital documents between academic institutions and their service providers. Achieved through an open web services architecture and associated standards, EdExchange is designed as a peer-to-peer network providing a secure, reliable, and direct connection between institutions (whether direct or through their service providers) that avoids file-based technologies.
Leaders within CDS, comprised of all the major stakeholders, will announce the launch of a pilot, phase 1 and provide a comprehensive executive summary on the overall project. Additional announcements will include the formal establishment of a Steering Committee (CCC Technology Center, Credentials Solutions, Educational Credential Evaluators, National Student Clearinghouse, Parchment, PESC, Stanford University, University of Phoenix) to manage the operations of EdExchange, which organizations are participating, and how CDS has partnered with key stakeholders and collaborated to ensure consistent expectations and standards.

**Creating a Common Credential: Evolution of Data Records Management for Credentialing & Experiential Learning – 1**

10:30AM – NOON

**Moderator:** Patrick Elliott, Associate Registrar, University of Maryland University College  
**Panelists:** Tom Black, Associate Vice Provost and University Registrar, Stanford University  
Amelia Parnell, Vice President for Research and Policy, NASPA

PESC’s Academic Credentialing and Experiential Learning Task Force is pleased to present the “Business Case for the Development of a PESC Standard in XML for Supporting Credentialing and Experiential Learning Records and for Enhancing Data Exchange Mobility.”

Since last spring when formed, The Task Force has been meeting and discussing evolving issues related to the emerging need to better capture experiential learning and competency based education. While policy and practitioner experts continue these very important discussions, the Task Force identified the need for a PESC Approved Standard for exchanging certificate credentials (including degrees and diplomas).

"Paper certificate credentials have been in existence for centuries and are used by many organizations and institutions to recognize participation, completion or achievement. However, there is no standard at present enabling the exchange of information related to the certificate credential." Such a standard does not take away from the value of other PESC Approved Standards (EDI, XML, PDF), but adds options for those needing to send and receive data while adding to the robust suite of PESC Approved Admissions and Registrar Standards.

Simultaneously, Stanford University with AACRAO, NASPA and a number of high profile institutions are working together on an extensive grant provided by the Lumina Foundation. Innovation in records management crosses all sectors of the ecosystem and we’ll touch on how this evolution impacts our current and future paradigms.

**Demystifying the Digital Divide: Student Behavioral Impact on Global Digitalization – 5th Anniversary of the Groningen Declaration Network**

1:30PM – 3:00PM

**Moderator:** David Moldoff, CEO & Founder, AcademyOne, US  
**Panelists:** Victoriano Giralt, Chairperson of the Groningen Declaration Network and Systems and Telematic Services Administrator at the University of Málaga, Spain  
Herman de Leeuw, Originator/Founder and Secretary, Groningen Declaration Network and DUO - Education Executive Agency, Ministry of Education, Science and Culture, Netherlands  
Michael Reilly, Executive Director, American Association of Collegiate Registrars and Admissions Officers (AACRAO), US  
Rick Torres, CEO and President, National Student Clearinghouse, US  
Tom Black, Associate Vice Provost for Student Affairs and University Registrar, Stanford University, US

Executive Committee Members of the Groningen Declaration Network will provide attendees with a unique perspective on this monumental initiative now expanding around the globe. This distinguished, expert panel will discuss in open roundtable format which organizations are participating in the Groningen Declaration Network, where interest is growing and what issues are driving interest; analysis of competing global/cultural perspectives; the vision for the 5th Annual Meeting in Cape Town and the future of the secretariat/organization; which organizations are participating in data exchange pilots along with identification of the data elements and objects being exchanged. This convening coincides with the launching of PESC’s Global Data Mobility User Group which will immediately begin work on standardization of an International School Code List. PESC became a Signatory to the Groningen Declaration Network in 2015 at the 4th Annual Meeting of the Groningen Declaration Network held at the University of Málaga in Spain.
The global initiative launched in Groningen, The Netherlands in 2012 seeks common ground in best serving the academic and professional mobility needs of citizens worldwide by bringing together key stakeholders in the Digital Student Data Ecosystem. The cornerstone principle is that citizens worldwide should be able to consult and share their authentic educational data with whomever they want, whenever they want, wherever.

With each annual meeting held after the inaugural 2012 meeting in Groningen (Beijing in 2013, Georgetown University in 2014 and University of Málaga in 2015), and with the 2016 Annual Meeting of the Groningen Declaration Network scheduled for May 17-19, 2016 in Cape Town, South Africa, more organizations are beginning to participate in data exchange pilots.

With their need for data standards and the footprint of PESC Approved Standards expanding beyond North America, cooperation and collaboration between PESC, its Members and the Groningen Declaration Network are presented with a real opportunity to advance interoperability on a global scale never-before-seen. For more info, please visit www.GroningenDeclarationNetwork.org.

**EVOLUTION OF DATA RECORDS MANAGEMENT FOR CREDENTIALING & EXPERIENTIAL LEARNING – 2**

**MODERATOR:**  
W. Matt Bemis, Associate Registrar, University of Southern California

**Panelists:**  
Rodney Parks, Registrar, Elon University  
Joellen Shandy, Associate Vice Provost and Registrar, University of Maryland University College  
Jeffrey Alderson, Principal Analyst, Enterprise Software, Eduventures

Elon University won PESC’s Annual Best Practices Competition for 2014 and we are excited to hear about the progress made since that time, how development and demand has grown, data and systems challenges, and what’s in store for the future. University of Maryland collaborates in many important arenas and initiatives, including the Competency-Based Education Network (C-BEN), coordinated by Public Agenda, which received a three-year grant from the Lumina Foundation; and Connecting Credentials, coordinated by the Corporation for a Skilled Workforce, also funded by the Lumina Foundation – and we’ll hear a broad perspective on these major initiatives. The challenge here is open community development that looks to build a framework that will enable some to launch services 100% digitally. This is no small task especially as many other initiatives, like the Coalition Application also launches. Eduventures will bring us up to speed on a whole host of initiatives and what they see as the future for credentialing and experiential learning.
PESC Approved Standards

Enabling the Portability of Student Data

PESC Approved Standards are provided in various technologies including EDI, XML and PDF.

*These PESC Approved Standards are provided in XML only.
ACADEMIC CREDENTIALING & EXPERIENTIAL LEARNING TASK FORCE

A provocative question posed to Education today is how to capture learning that happens outside of the classroom. In addition to the traditional Academic Transcript, many are starting to use competency based transcripts and co-curricular/experiential transcripts as well. Both provide valuable information for admission into the education and workforce environment and both seem to be growing rapidly in use. While data standards are ultimately needed for all transactions in order to achieve full interoperability, final agreement has not been reached on the actual definitions of both items. While the market may need to mature more in order for data standards to be used and accepted, PESC formed its newest Task Force – Academic Credentialing & Extended Transcript. This Task Force is monitoring the community and is preparing PESC for any new standards as well as any extensions or additions that might be needed to existing PESC Approved Standards.

SEAL OF APPROVAL BOARD

The PESC Seal of Approval Program is a voluntary service offered by PESC for implementers of PESC Approved Standards to indicate a uniform level of implementation. Implementers must formally apply to PESC for the Seal of Approval using the official application and must submit a small, non-refundable fee to PESC. The service was designed to communicate to the community at large that a certain implementation of PESC Approved Standards has been uniformly implemented according to the original intent and spirit of the PESC Approved Standard. A Seal of Approval can be used by implementers to market products and services to demonstrate alignment and interoperability. The Seal of Approval Program is a formal process governed by specific policies and procedures and by a Seal of Approval Board (SAB), comprised of PESC member representatives appointed by the PESC Board of Directors, and Chaired by PESC’s Vice Chair of the PESC Board of Directors. The Seal of Approval Program is a voluntary program of PESC and eligibility to apply is open and available to any organization or implementer in education.

CCB/TAB JOINT BOARD MEETING

The Technical Advisory and Change Control Boards of PESC govern the technical standards, the process by which a format is proposed as a PESC Approved Standard and all the technical documentation and tools needed to support the development and use of PESC Approved Standards. At this session, both Boards discuss the additions and revisions to data elements, the NIEM process and the relationship between PESC, XML and other emerging technologies like JSON.

COMMON DATA SERVICES (CDS) TASK FORCE & EdExchange USER GROUP

In December 2011 PESC created the Common Data Services (CDS) Task Force with the mission to improve security, reliability, efficiency and speed in the transfer of education data. Leaders within the California Community College System requested this community development and service through PESC and submitted a formal, open Letter of Intent. After several years of analysis and planning to ensure alignment & interoperation with all other community-based initiatives, CDS is formally announcing, EdExchange. EdExchange is a data exchange platform that enables the electronic exchange of standards-based data and digital documents between academic institutions and their service providers. Achieved through an open web services architecture and associated standards, EdExchange is designed as a peer-to-peer network providing a secure, reliable, and direct connection between institutions (whether direct or through their service providers) that avoids file-based technologies.

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EA2 TASK FORCE & COMMON IDENTITY & TRUST (CommIT) COLLABORATIVE

The Common Identity & Trust (CommIT) Collaborative sprung from a strategic partnership forged between Internet2 and PESC. In realizing that authentication and multiple user names and passwords can be a barrier to interoperability, Internet2 through InCommon and PESC through its EA2 Task Force, launched CommIT, an independent unique ID that colleges, universities, schools and various service providers can invoke to experience a ‘single sign-on’ experience. With three universities already in a pilot stage, that is each has segmented a small population of students that are using CommIT in a production environment, and a number of service providers lining up to engage in CommIT, this session furthers the work of the pilots and prepares the community for the launch of the CommIT product.

EDUCATION RECORD USER GROUP

The Education Record User Group governs all admissions and registrar based PESC Approved Standards. These include all EDI, XML and PDF technologies used for delivery of Transcripts, Admissions Applications, Test Scores, etc. At this session, the User Group will continue discussing updates and changes originating from the community and scheduling changes through the Change Control Board.

GLOBAL DATA MOBILITY USER GROUP

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For 2016, PESC will participate in the following industry activities and events:

- **Access 4 Learning**
  - February 9 - 11, 2016
  - Westin Crystal City

- **Parchment Summit**
  - February 17, 2016
  - Renaissance Washington DC

- **AACRAO Annual Conference**
  - March 20 - 23, 2016
  - Phoenix Convention Center

- **Groningen Declaration Network**
  - May 17 - 19, 2016
  - Cape Town

- **ARUCC**
  - June 19 - 22, 2016
  - Sheraton Vancouver

- **PESC Annual Board Retreat**
  - June 28 - 30, 2016
  - Embassy Row Hotel

- **AACRAO Technology Conference**
  - July 10 - 12, 2016
  - Anaheim Marriott

- **NCES STATS-DC**
  - July 2016
  - Washington DC

- **SHEEO Policy Conference**
  - August 9 - 11, 2016
  - Pittsburgh Omni
Save the Date

EDiNERROP OCTOBER 2016
San Diego
TBD

PESC Board of Directors

Doug Falk, CIO, National Student Clearinghouse, Chair
Charles Leonhardt, Director of Online Student Applications, Georgetown University, Vice Chair
Patrick Elliott, Associate Registrar, University of Maryland University College, Treasurer
Brian Allison, Vice President of Product Development, Secretary
Rajeev Arora, Senior Vice President of Products, Parchment
W. Matthew Bemis, Associate Registrar, University of Southern California
Kristi Blabaum, Systems Integration Analyst, Great Lakes Higher Education Corporation, NASLA
Tuan Ahn Do, Director of Enrollment Management Technology, San Francisco State University, AACRAO
David Moldoff, CEO and Founder, AcademyOne
Michael Sessa, President & CEO, PESC
Francisco Valines, Director of Student Aid, Florida International University
J. James Wager, Education Strategist & Consultant, Credentials Solutions
Andy Wood, Vice President of Product Engineering, Oracle
Who We Are

Established in 1997 at the National Center for Higher Education and headquartered in Washington, D.C., PESC is an international, 501 (c) (3) non-profit, community-based, umbrella association of data, software and education technology service providers; local, state and federal government agencies; schools, districts, colleges and universities; professional, commercial and non-profit organizations; and non-profit associations and foundations.

Our Mission

Through open and transparent community participation, PESC enables cost-effective connectivity between data systems to accelerate performance and service, to simplify data access and research, and to improve data quality along the Education lifecycle.

Our Vision

PESC envisions global interoperability within the Education domain, supported by a trustworthy, inter-connected network we call EdUnify - built by and between communities of interest in which data flows digitally and seamlessly from one community or system to another and throughout the entire eco-system when and where needed without compatibility barriers but in a safe, secure, reliable, legal, and efficient manner.

About Privacy

While PESC promotes the implementation and usage of data exchange standards, PESC does not set (create or establish) policies related to privacy and security. Organizations and entities using PESC Approved Standards and services should ensure they comply with FERPA and all local, state, federal and international rules on privacy and security as applicable. For more information, see www.PESC.org.
PESC Members

MULTIPLES STAKEHOLDERS. ONE VISION.

AACRAO
AcademyOne
Accenture
Access 4 Learning
ACE
ACRP
ACT
American Student Assistance
ApplyAlberta
Arizona State University
California Community College System
California State University System
Capella University
Career Cruising
Central Connecticut State University
College Board
CollegeNet
Common Application
Community College of the Air Force
Cosumnes River College
Credentials Solutions
DecisionDesk
digitary
ECE
Educause
eellucian
ELM Resources
Elon University
Emory University
Florida International University
FSMB
Georgetown University
Groningen Declaration Network
Hobsons
Houghton Mifflin Harcourt
iData
IERF
IMS Global Learning Consortium
Indiana State University
Jenzabar
Kuali Foundation
Memorial University of Newfoundland
Michigan State University
NASFAA
NASLA
National Student Clearinghouse
NCHER
OCAS
Oracle
OUAC
Paradigm
Parchment
Pittsburg State University
Purdue University
SHEEO
Simon Fraser University
Smart catalog
Smarter Balanced Assessment Cons.
Southern Connecticut State University
SSD Technology Partners
Stanford University
University of Arizona
University of British Columbia
University of California at Berkeley
University of Denver
University of Idaho
University of Illinois System
University of Lethbridge
University of Louisiana at Lafayette
University of Maryland UC
University of Mississippi
University of Missouri System
University of Northern Iowa
University of Oregon
University of Phoenix
University of Puerto Rico System
University of South Florida
University of Southern California
University of Texas at Austin
University of Virginia
University of Wisconsin
US Department of Education
USA Funds
Washington State University
Workday
XAP
PESC’s cornerstone principle, transparent and direct community participation, is never more apparent when the entire list of PESC’s leadership team is viewed. We thank all representatives and organizations, including the PESC Board of Directors, who help lead and serve as the voice for the PESC Community!
The Best Practices Competition is held to highlight and promote innovation and ingenuity in the application and implementation of interoperable data standards for business needs. First held in 1999, the Competition is open to institutions, associations, organizations, government agencies and departments, districts, consortia, non-profit and commercial service providers and other education stakeholders that have collaborated to design and/or adopt an electronic standardization initiative via a specific implementation, and/or other medium such as, but not limited to, published articles and white papers.

The Winner for the 17th Annual Best Practices Competition is __________

Congratulations!

<table>
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<tr>
<th>Year</th>
<th>Project Details</th>
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<td>Elon University &amp; Parchment, Elon Experiences Transcript &amp; Integration to the Academic Transcript</td>
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<td>2013</td>
<td>University of Phoenix, Electronic Transcript Acquisition Process</td>
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<td>OCAS, Ontario College Application Service</td>
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<td>2011</td>
<td>US National Center for Education Statistics, Common Education Data Standards</td>
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<td>2010</td>
<td>South Carolina Transfer &amp; Articulation Center</td>
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<td>2009</td>
<td>College Foundation of North Carolina, Electronic High School Transcript System</td>
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<td>2008</td>
<td>California Community College System - CCCTran, University System of Georgia - Implementation of XML Transcripts</td>
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<td>2007</td>
<td>Sinclair Community College &amp; Wright State University, Exchange of Electronic Transcripts via Ohio Articulation &amp; Transfer Clearinghouse</td>
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<td>2006</td>
<td>Data Quality Campaign, Using Data to Improve Student Achievement</td>
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<td>2005</td>
<td>NCHELP, CRC Beta Test</td>
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<td>2004</td>
<td>US Federal Student Aid, XML Registry &amp; Repository for Education</td>
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<td>Access 4 Learning, SIF Specification</td>
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<td>2002</td>
<td>ELM Resources - ELMNet, NCHELP - Meteor</td>
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<td>NCHELP, Common Account Maintenance</td>
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<td>University of Northern Iowa, EDI Bridge</td>
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<td>1999</td>
<td>Ontario Universities’ Application Centre, A Model of an Electronic Standardization Initiative</td>
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