FALL 2017 DATA SUMMIT

FALL 2017 SYMPOSIUM & DATA SUMMIT
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SECURE DOCUMENT TRANSMISSION: a McGill/National Student Clearinghouse/CHESICC pilot project
Based in Montreal, Quebec, Canada
Anglophone university founded in 1821
Large public research medical-doctoral university
40,500 enrolled students
  27,500 undergraduates
  9,500 graduates
  4,000 postdocs, residents and other non-credit
45,000+ applicants for UG and GR admission annually
40,500 registered students (all levels):

- 11,000 international students (27% of total enrolled)
  - 1,900 Chinese students
  - Second only to US (2,400), and growing quickly
- 20,000 international applicants per year (44% of total)
  - 3,500 applicants from China per year
    - 2,000 UG + 1,500 GR
National Student Clearinghouse

- Founded in 1993
  - non-profit, NGO
  - Established by higher education to serve higher education data needs
  - Voluntary participation by institutions; agent status
  - No cost to higher education
  - Most complete higher education degree and enrollment database in the US
  - >1.3 billion electronic transactions year
  - >$850mln annual cost savings to higher education
  - Largest electronic education data exchange in the US

- Non-Profit, NGO Research Center created in 2010
  - Combines with third party data, informing public policy discussions regarding the efficacy of the education to workforce pipelines in the US

Keys: Trust, high value proposition
- 1,500+ GR applications annually from Chinese applicants
- 2-stage admissions process for all GR applicants:
  - Grad Department
  - Central Admissions office (Enrolment Services)
- Applicants upload documents with online application; if admitted, must bring official documents at start of admit term
- 400+ UG and GR admitted from China Fall 2016 (200+ registered)

Looking for a solution that would allowed for rapid easy verification of critical admissions documents
Goals & Objectives of the Pilot Program

- Work burden reduction
- Paperwork reduction
- Reduced fraud: elimination of false positives
- Improved reliable student level information and data transparency
- Significantly reduced processing/decision making timetables
- Increased administrative production capacity via efficiency gains
- Greatly enhanced scalable mobility enablement

Reduce processing time, increase productivity and lower costs with higher quality
Building Blocks of International Pilot

- Trusted authorities: entity that can provide authoritative representation of facts
- Trusted intermediaries: agents and or representatives of trusted authorities
- Closed network process: No unauthorized outside entity or student access to data
- Assessment of authority’s or intermediary’s ability to verifiably have access to and deliver required information
- Technical: Creating data standards, registries
- Test and learn: willingness to complement existing process leading to replacing existing process

Equal commitment of all parties
What made NSC trusted from CHESICC’s perspective?

- Agent status to US institutions was key
- Trusted intermediary status verified by institutions
- Used by and talked to other trusted entities like AACRAO (American Association of Collegiate Registrars and Admission Officers)
- Groningen meeting served as an introduction and we were recognized by others.

**Trusted intermediaries: agents and or representatives of trusted authorities**
CHESICC:

• Established in 1991, an institution directly under Ministry of Education.
• The only MOE-authorized institution for higher education Qualification Verification in China.
• CHSI, maintained by CHESICC, the only MOE-designated website for qualification verifications.
Student Record and Qualification Management

117 Million Qualifications; with an Annual Growth of 10 Million

All schools nationwide (100%)
100% students

Over 40 million in-school students

- Undergraduate, 2118
- Graduate, 139
- Doctorate, 29
- Junior College, 1993

1993 Undergraduate, 2118 Graduate, 139 Doctorate, 29 Junior College, 1993
Student Record and Qualification Management

Postsecondary In-school Students:
- Student Record (Online)
- Higher Ed Transcript

Postsecondary Graduated Students:
- Qualification Certificate (Paper)
- Qualification Certificate (Online)
- Higher Ed Transcript

Secondary Graduated Students:
- Gaokao Scores
- High School Diploma

Others:
- Coming future...

ADVANCING STUDENT MOBILITY IN A DIGITAL WORLD

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CHESICC
Online Verification of Student Record

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Transcript Process

1. Scanned Copy
   - Upload

2. Contact Schools

3. Verification Reports
NSC’s USA-Connect via the principles of the Global Registrar EduRecord Exchange Network (G.R.E.E.N.)

- A free, open, standards based network to enable the secure exchange of electronic student academic records worldwide
- A gateway for schools to exchange student data records to support the increasingly mobile student population.
- Interoperability: schools should be able to access the network regardless of SIS provider
- A common registry where schools can define and maintain their profile, identifying preferred delivery methods, files types, etc. will drive the exchange of student data without having to subscribe to multiple services
Project with NSC

International Student Mobility

Efficiency
Project with NSC: PROCESS

**PROCESS**

- CHESICC and universities were provided sender and receiver ID’s for NSC network
- NSC will sweep docs from CHESICC to University SFTP
- University receives secure notification to retrieve document
Clearinghouse offer to participate in Project provided solution to verify documents

- Verified documents from Chinese partners are transmitted by the Clearinghouse in pdf form in 2015; electronic batch loading begins in 2016.
- Easily complemented our existing method and lightened the workload significantly with no need for individual verifications we would have to initiate.

Assessment of authority’s or intermediary’s ability to verifiably have access to and deliver required information

Test and learn: willingness to complement existing process leading to replacing existing process.
In 2015 (ie. Yr1), we notified via email 200+ confirmed-admitted Graduate-level Chinese applicants for Fall 2015 - but only as of late June – that they needed to have documents verified through CDGDC & CHESICC

• Only 1 student sent documents via the electronic route, due to:
  – communication went out late, and most students had already arranged for paper documents to be sent
  – McGill did not make the process mandatory, so students opted for the paper instead of electronic
In 2016 (ie. Yr2), we notified students earlier in the cycle (ie. as of March), and also made mandatory that they follow the electronic route.

Of the 393 Admitted:
- 80 declined admission (20%)
- 70 had offers of admission expired (18%)
- **228 confirmed admission (58%)**
- 14 deferred admission to another term (4%)

Of the 228 confirmed admission, ~140 submitted electronic documents (61%)
Our belief was this would be an easier process of verification and this was borne out.

*We anticipate electronic transmission of the documents next year to be an improvement*

FAQ sent out with the e-mail explained why we were requesting verification: Pilot Project involvement, Chinese Government offering a verification service that other countries do not; the goal was to simplify our workload leading to more efficient processing of applications.

*Technical: Creating data standards, registries*
Initially concerned verification requests would go to spam/trash boxes

Early notification to admitted students vital

Be prepared with rationale for process in case of pushback

Must be flexible in the first year

Next year we will post the verification notification to the Status Check page of student record

The timing of the availability of documents at the CHESICCC end still led to issues with completing files; this would have been no different in a paper world, however
For all situations where the CHESICC records were duly available from CHESICC to start with:

- Work burden reduction
- Paperwork reduction
- Reduced fraud: elimination of false positives
- Improved reliable student level information and data transparency
- Significantly reduced processing/decision making timetables
- Increased administrative production capacity via efficiency gains
- Enhanced scalable mobility enablement
Goal: Transformation of the status quo:

- Total eco-system time/cost/efficiency improvements:
  - Baseline: total document production, handling, delivery, assessment and storage (paper or manual digitalization including apostille process)
  - New process: measurement of the process with enhancements

Key elements required to deliver effects

- Trusted sourcing / delivery of critical educational information
- Standards based approaches to data exchange
- Administrative buy-in (ministries, universities, students and as well as secondary tertiary exchange actors)

- **Scalability** assessments
- Sustainability assessment
- Prioritization
• Roadmap to adoption and scale – major areas
  – Digital exchange standards development for documents
    • Documents, data elements
  – Updated and actively managed sender / receiver registries
  – Staying engaged in multinational exchange efforts (i.e.: EWP)
  – Scalable, accessible credential comparability rubrics
    • Resolving comparability issues i.e.: US Associate degree in China
  – Monitoring and engaging in evolving privacy and regulatory landscape
    • GDPR, FERPA, Privacy Shields, emerging new US standards
谢谢 (xiexie)
Merci! Thank You!

- Ricardo Torres (National Student Clearinghouse)
  rtorres@studentclearinghouse.org

- Romesh Vadivel (McGill)
  Romesh.Vadivel@mcgill.ca