Colorado Electronic Data eXchange Transcript Implementation

University of Colorado Boulder

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Quick Show of Hands

- Who is from Wyoming?
- Who is from New Mexico?
- Who is from Colorado?
- Have you heard of this EDX Transcript Project?
• Understand electronic data exchange of transcripts is and how it works.

• Articulate the advantages of a Colorado state wide Electronic Transcript Data Exchange

• If your school/university is not involved in a statewide initiative, understand how you can become involved.
Outline / Agenda

- Common Definitions
- What is Electronic Data Exchange
- Why Electronic Data Exchange
- Colorado Electronic Transcript Data Exchange Project
  - Background
  - Current Project Status
  - The Future
- Lessons Learned
Common Definitions
Common Definitions

- **EDX Transcripts** – Electronic Data eXchange of transcripts
- **XML** - XML stands for eXtensible Markup Language
- **EDI** – Electronic Data Interchange
- **CDHE** – Colorado Department of Higher Education
- **SPEEDE** - Standardization of Postsecondary Education Electronic Data Exchange
- **PESC** - Postsecondary Electronic Standards Council
What is EDX Transcript Exchange?
What is EDX Transcript Exchange

• **EDX** is used to describe the electronic transfer of data between two computer systems

*Process:*

1. Extract Education Records from one system (school SIS)
2. Translate that data in an approved common data standard
   • Accredited Standards Council (ASC) EDI Standard
   • Post Secondary Electronic Standards Council (PESC) XML Standard
3. Transmit data from one computer system to another
4. Translate the data for the receiving system
5. Import data into the recipients computer system

*AACRAO’s Basic Guide to Electronic Data eXchange*
What is EDX Transcript Exchange

Figure 1 - Basic Guide to EDX by the AACRAO SPEEDE committee
EDX Data Standards: EDI & XML

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Further Reading from AACRAO Publications

AACRAO’s Basic Guide to Electronic Data eXchange

Visit the on-site bookstore
Why EDX Transcript Exchange?
Why Electronic Exchange of Transcript Data

• Save on staff time manually entering transcript course data off of PDF or paper transcripts into Degree Audit or Student Information System

• Automate the process (Transfer Credit Articulation)

• Improve student experience (faster turn around time for transfer credit review)

• Remove human error

• Build partnerships with schools in state of Colorado for common goal
Colorado Electronic Transcript Data Exchange
Project: Background
Colorado EDX Transcript – Background

- Registrars and Admissions Officers in Colorado informally talked about exchanging data for past 5-7 years
- Grass Roots Effort (not a state mandate) organized and lead by CU Boulder
- Internal Discussions at CU between Registrar and Admissions in early / mid 2018
- Spoke with CDHE about interest and support in September 2018
Colorado EDX Transcript Committee Overview

First Meeting October 2018: Proposed charter and officially formed Colorado EDX Transcript Implementation Committee

- **Participation:** Colorado Community Colleges and voluntary 4-year institutions of higher education

- **Implementation Committee Schools:** CU Boulder, UCCS, CU Denver, University of Denver, Colorado State University, Colorado School of Mines, University of Northern Colorado, Metropolitan State University of Denver, Aims Community College, Colorado Community College System, Colorado Mesa University

- **Implementation Committee Representation:** Admissions Staff, Registrar Staff, IT Staff, CDHE

- **Executive Sponsor:** CDHE
**Who:** volunteers in institutions of higher education throughout Colorado.

**Purpose:** to enhance existing business processes across the state that currently rely on paper transcripts and electronic images formatted as PDFs.

**Goal:** Implement Electronic Data eXchange (EDX) between Colorado’s institutions of higher education, namely between the Community College System and volunteer 4-year institutions.

*Open to any interested institutions in Colorado joining at any point*
Colorado EDX Transcript – Initial Steps

• EDX Committee leadership presented concept to Colorado Community College System to get buy-in (key partner)

• Additional announcement & discussion at Colorado Department of High Education Registrar Council Meeting

• Follow up email to smaller schools summarizing implementation project and inviting to join

• At least one school (CSU) was already planning to move forward with implementation in 2019

• Informal discussion with transcript vendors
Colorado EDX Transcript Committee
Initial Decisions / Discussion

• Should we as a state send XML or EDI Transcripts? Does it matter?

• How will we send electronic transcript data? Directly through SPEEDE vs. using vendor to send through SPEEDE vs. other?

• How will committee decisions be made? Voting members, individually?

• What type of roll will vendors play in this process?

• Will each school develop and produce their own XML / EDI transcript themselves or leverage vendor to translate?

• Start with exchanging transcripts between 2 - 4 year Colleges or 4 to 4 year Colleges?
Colorado EDX Transcript Committee
Continued Decisions / Discussion

• Where can we get the most out of exchanging XML/EDI transcripts – who are the feeder schools?
• How do we get buy-in from administration or key IT staff?
• How can we learn from and support each other during this process?
• Initially what is a realistic timeline?
• Resources as project moves forward?
EDX Transcript Committee – Questions for Vendors

Vendors presented at 3rd monthly Colorado EDX Meeting

• Will you send transcripts via EDI/XML
• Will you track EDI/XML transcripts through ordering system same as PDF transcripts?
• Will you send a PDF transcript along with an EDI/XML transcript or in lieu of?
• Will you translate XML/EDI transcripts into PDFs and vice versa?
• Will you charge extra for sending or receiving XML/EDI transcripts?
• Will there be an initial setup fee or ongoing yearly fees to send XML?
Colorado Electronic Transcript Data Exchange Project: Updates
Colorado EDX Transcript Committee – Project Updates

Original Timeline: 9-12 months for pilot
- Monthly Committee Meetings (Start Oct 2018)

Pilot:
- **Send:** Colorado Community College System will provide electronic transcripts as structured data (XML), conforming to industry standards
- **Receive:** 4-year institutions develop a means to receive the new format (XML).
- Exchange between Post-secondary Schools Only
October 2018: Vendors made aware of pilot

- Many Schools in Colorado Parchment clients so continued involvement and discussion with them
- Colorado State was a Credentials Client so they were also informed of pilot
- Colorado Community College System agreed to be initial senders of XML transcript
- University of Colorado and Colorado State University agreed to be original receivers of XML transcripts
EDX Transcript Committee – Project Updates

- Currently each school working with central IT
  - Where does XML project fit into queue / prioritize
  - Proposed workflow of XML transcript data
  - Where to store XML data (admissions Software, Document Imaging, Degree Audit, other)
  - APIs for sending XML data files downstream into other systems (u.achieve, etc.)
  - Timeline for being able to consume XML data
  - Timeline for producing XML transcripts
EDX Transcript Committee – Project Updates

• Working on common PESC XML Schema for state of Colorado

• **Timeline Adjustment (mid-2020):** most schools will need additional 6 months to create / translate XML transcript
  • This could potentially shift focus from CCCS being first producer of XML transcript

• 4 year schools prioritize receiving and consuming XML data; will also need to produce XML transcripts
EDX Transcript Committee – The Future

- Modify admissions process to consume XML transcript data
- Receive and translate EDI transcripts to XML
  - SPEEDE proposal
  - Amazon Web Services
- Begin to receive XML transcripts from Post Secondary institutions outside state of Colorado
- Colorado post secondary schools receive EDI / XML Transcripts from Secondary Schools
Lessons Learned
Colorado EDX Transcript Committee – Lessons Learned

- Different priorities between RO and Admissions
- Involvement from many different stakeholders (Admissions, Registrar Staff, CHDE, IT departments)
- Many different levels of understanding of both concepts and technical knowledge involved in the process
- It is not always as easy to get buy-in institution wide as you think
- Make sure to have informal discussions with key players at first and not surprise anyone
Colorado EDX Transcript Committee – Lessons Learned

• Vendor decisions and timelines
• Must keep momentum going even with remote meetings
• Each school should get this on IT radar sooner than later
• Communicate to schools via CHDE or direct emails
• Sell the long term vision – improved student experience, less human error, and staff money & time savings
Colorado EDX Transcript Committee – Lessons Learned

• Learn from other state initiatives that were previously implemented or currently underway
• Always staff turn over and movement so committee representatives and roles change
• Priorities & timelines for implementation for each school will differ
• Create buy-in from each school, show potential impact
• Shared agreement document that outlines processes and shows each schools commitment (regardless of timeline)
Colorado EDX Transcript Committee – Lessons Learned

• State Wide Perspective

• System Wide Perspective

• Participation and collaboration from all committee members
  • Creation of shared google site
  • Monthly in-person & web ex meetings

• Initial CO EDX Charter Document was extremely useful
Colorado EDX Transcript Committee – We want to hear from you

• Are you interested in starting a state-wide initiative? (New Mexico & Wyoming)

• Those involved in Colorado Initiative – what are the lessons learned so far in your opinion. Did we miss anything?

• Do you represent a school in Colorado who is not involved? If you want to be come see us after the presentation
THANK YOU!

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Questions?