



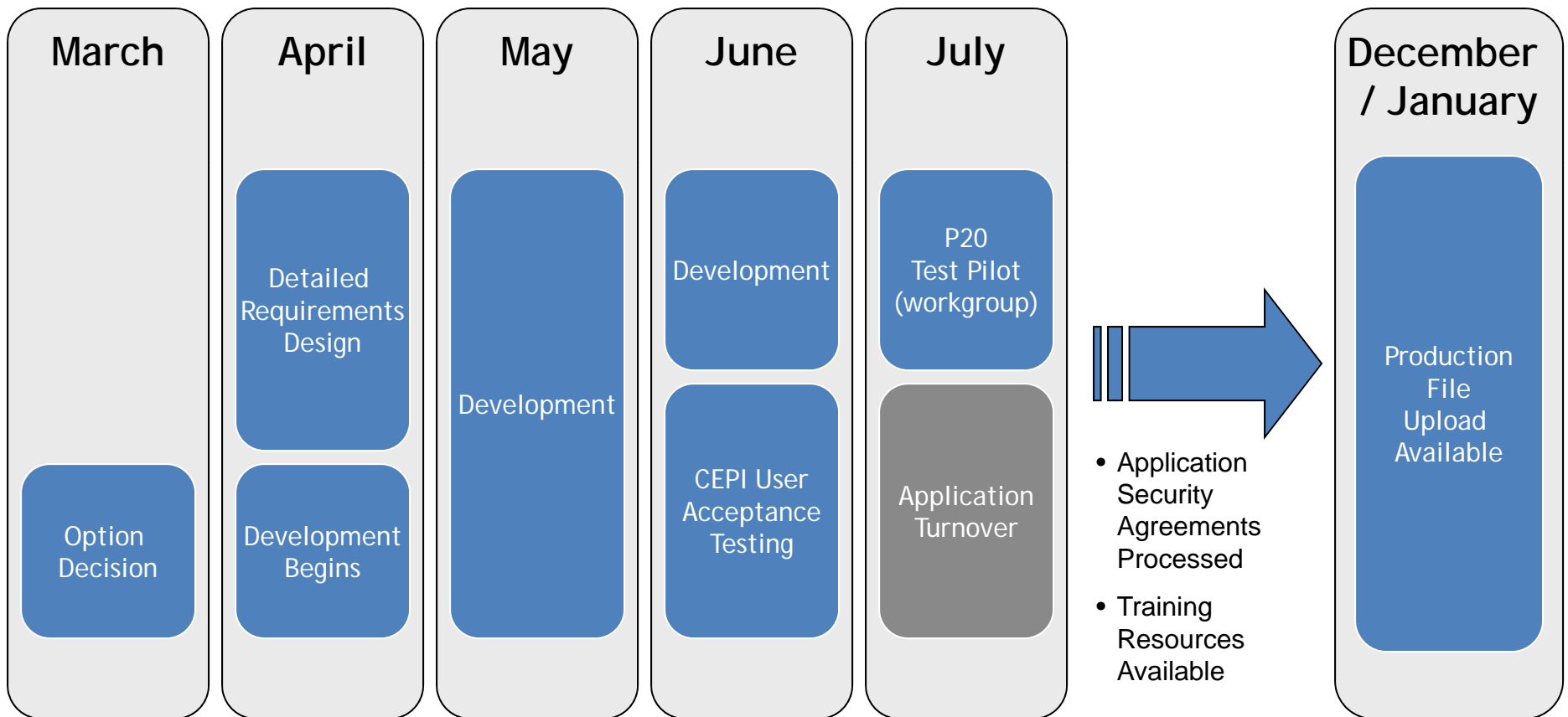
Extending the UIC into the Postsecondary Environment

MACRAO

March 26, 2010



Adult Learner UIC Timeline





P20 UIC Workgroup

Met 3/24/2010

- **Kortney Briske**, Associate Registrar, University of Michigan
- **Kristin Schuette**, Associate Registrar for Technology, Michigan State University
- **Scott Owczarek**, Associate Registrar, Michigan State University (MACRAO President Elect)
- **Dr. Carrie Jeffers**, Assistant Director of Enrollment Services, Macomb Community College
- **Kara L. Fields**, Asst Director Records and Registration, Walsh College
- **Howard Shanken**, Registrar, Grand Rapids Community College



MSDS Security

- MSDS is a secure application with role-based security
- Application access is granted based on entity approval
 - K12 access requires an application user agreement signed by the district superintendent
 - Workgroup recommended that the registrar be the signatory for granting access to a postsecondary entity
- Users are required to utilize the system in compliance with FERPA and additional privacy regulations
 - Signature on security agreement
 - FERPA acceptable use page presented to users every 90 days
- Specific roles exist for uploading data, using student search, downloading datasets, viewing reports, resolving UICs, and requesting UIC links
- Student Search is used for *purposes of enrollment* and is only available to authorized users



Recommended Option for Providing P20 UICs

- Periodic file upload from P20 to the MSDS
 - P20 Request for UIC Collection only for enrolled students (not applicants)
 - This collection validates any UICs that are already on records in the file, and provides UICs back for any records that were submitted without a UIC
 - Process would be available year round
 - CEPI will communicate peak K-12 system usage to post-secondary
- MSDS processes the file through a P20 Matching Profile
 - Additional rules are considered that meet design specifications
- All records without a single positive match are assigned a new UIC
- Postsecondary pulls the reports from the MSDS and incorporates the validated UICs in the local system
- Student Search can be done on an individual lookup basis



Matching Profiles

- MSDS allows for custom matching profiles
- MSDS uses the following core fields for matching:
 - Last Name
 - First Name
 - Date of Birth
 - Gender
- MSDS also uses the following fields in the matching logic:
 - Last Name Suffix
 - Middle Initial
 - Middle Name
 - Multiple Birth Order
- Scores / weights will be evaluated by workgroup to determine appropriate threshold for the creation of new UICs



Additional Flexibility in Matching Rules

- Strip Characters
- Last Name Hyphenated
- First Name Last Name Transposed
- Last Name Change
- First Name Synonym
- Middle Name Matches One Side Hyphenated Last Name



Alternative Options Considered

- **Uploading file with UIC Resolution**
 - UIC Resolution is the returning of possible matches to the authorized user to manually designate if the master record is a match to the submitted record and to request a new UIC if it is not a match
 - The workgroup decided against the option for the initial roll-out because of the extra effort and training that it would require
 - The risk of creating duplicate UICs is minimized by the MSDS Deduplication process that allows for searching for duplicates and linking those records
 - This option will be revisited after 12-24 months
- **Bulk upload from Docufide files**
 - The workgroup decided against this option because the UICs are not returned in a timely manner for incorporation in the local student systems



Other Considerations

- The group evaluated creating a “P20 UIC” that would allow these UICs first created at the postsecondary level to be segregated from the K12 matching and student search processes
 - This approach was determined undesirable because of the overlap especially with students who are dually enrolled (the UIC could be requested first by the IHE and then the K12 entity would need this match)
- Considered only having the system available for uploads at periodic times during the year
 - This approach was determined undesirable because the postsecondary entities will need greater access to the UICs for sending transcripts
 - CEPI will communicate K12 peak usage times so that these periods can either be avoided, or support may be delayed



Detailed Requirements Session: April

- What additional fields are required for UIC matching? Examples:
 - Previous Last Name
 - High School Graduation Year
 - Graduating High School
- What should the Matching Threshold be to trigger new UICs?
 - New UICs created if there are multiple possible matches
 - New UICs created if there is a single possible match of a certain weight
 - New UICs created if no match is returned
- Testing / Piloting
 - Hope to obtain data files from the workgroup members in order to have results for making the decisions above
 - Early testing using an exact match process resulted in about a 75% match rate
 - In K12, we are at just over a 98% match rate using our weighted process
- Any questions should be sent to your MACRAO executive committee