Maximizing Your Clearinghouse Services

Julie Esau, Regional Director
Joe Roof, Regional Director
AGENDA

- Clearinghouse Background
- Enrollment Reporting
- Reverse Transfer
- Transcript Services and Secure Print
- StudentTracker Premium
The Clearinghouse Mission

We serve the education community by facilitating the exchange and understanding of student enrollment, performance, and related information.
OUR REACH - ENROLLMENT

3,600 colleges and universities participate with the Clearinghouse

98% Title IV degree-granting institutions representing 98% of U.S. postsecondary education enrollments participate in the Clearinghouse

93% Participating postsecondary institutions representing 92% of all degrees awarded in the U.S.

1.1 MILLION enrollment verifications

700 MILLION student record verifications

4.5 MILLION degree verifications
Clearinghouse Services

FINANCIAL AID services
- Enrollment Reporting
- Audit Resource Center

VERIFICATION services
- EnrollmentVerify
- DegreeVerify
- Student Self-Service

RESEARCH services
- StudentTracker
- StudentTracker Premium
- Research Center

DATA EXCHANGE services
- Transcript Services
- Ellucian eTranscripts & S.I.S. Integration
- Electronic Transcript Exchange
- Reverse Transfer
The World of Financial Aid Before the Clearinghouse

Students and institutions suffered
The World of Financial Aid Before the Clearinghouse

**Issues:**
- Paper-Driven
- Expensive
- False Positives
- Delinquencies
- Defaults
The World of Financial Aid After the Clearinghouse

- **COLLEGES & UNIVERSITIES**: 3,600+ postsecondary institutions, represents 98% of U.S. enrollment.

- **NSLDS**

- **GUARANTORS**

- **SERVICERS**
Enrollment Reporting with the Clearinghouse

- Speed
- Accuracy
- Support
Speed
Faster and more timely

• ALL students reported. NSC process determines recipients, including private loan servicers

• Identifies and adds 5 million students annually missing from NSLDS inquiry

• Outsourced deferment form processing

• In-house compliance and enrollment reporting experts to support your institution through every stage of the process
Accuracy

*Reduced errors*

- Data pre-checked to identify and resolve potential issues *BEFORE* submission to NSLDS.
  - Pre-check identifies an average **26 errors per 1,000 records** on enrollment files submitted to NSC that would otherwise have resulted in NSLDS errors

- Improved accuracy enhances the trust and confidence of the institution
Support

Enrollment management, risk mitigation and education

- Ongoing enhancements keep schools in compliance with evolving guidance and regulations
  - Reduces need for schools to maintain technical and business resources to adapt to these changes

- Resources for best practices and audit support

- Online, live, in-person and self-paced training and tutorials

- FSA information regarding trends, focus and upcoming changes is proactively shared
Resources

• Compliance Central
• Audit Resource Center
• Clearinghouse Academy
Audit Resource Center

• Assists ~1,000 schools per year
• Works with you and your auditors to explain issues and provide documentation to reduce and eliminate audit findings
• Aids with audits and day-to-day compliance questions
• Offers online resources for preparing and responding to an audit
• Shares trends in auditor areas of focus
Recent Enhancements for Enrollment Reporting

NSC is working to meet school client needs expressed and upcoming changes from FSA.

- Sending stacked records to NSLDS
- Suppressing L statuses for Non-Comp/Non-Summer
- Include checks on Program Length and Title IV Weeks
- Five point program level matching for enrollment files
- Downloadable reports related to Student Program Level data and other key elements
- Additional features and functionality related to editable G from DegreeVerify
What is Reverse Transfer?

It is the transfer of credits from a four-year (or two-year) institution to any two-year institution from which a student transferred. If eligible, the student is awarded an associate degree.
Potential for:

- Increased Funding
- Completion Rates
- Reverse Transfer
- Enrollment
- Decrease Student Loan Default Rates
How do we know it increases completion rates?

66% of students transfer before earning an associate’s degree.
Increase your graduates!

“Credit When It’s Due (Reverse Transfer) evidence shows a 5% to 18% retention in bachelor’s degree advantage for students who receive Reverse Transfer”

Jason Taylor, Assistant Professor
University of Utah, CWID researcher
Why is Reverse Transfer Important?

Targets student population with highest student loan default rates
### Why is Reverse Transfer Important?

#### Less Student Debt, Higher Default Rates

Students with less student debt are least likely to pay back their loans, because many do not have jobs that pay well.

<table>
<thead>
<tr>
<th>Debt Range</th>
<th>Default Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>$1,000 to $5,000</td>
<td>34%</td>
</tr>
<tr>
<td>$5,000 to $10,000</td>
<td>29%</td>
</tr>
<tr>
<td>$10,000 to $25,000</td>
<td>24%</td>
</tr>
<tr>
<td>$25,000 to $50,000</td>
<td>21%</td>
</tr>
<tr>
<td>$50,000 to $100,000</td>
<td>21%</td>
</tr>
<tr>
<td>more than $100,000</td>
<td>18%</td>
</tr>
</tbody>
</table>

Among graduate and undergraduate borrowers who left school in 2009, share who defaulted by 2014. Sources: Federal Reserve Bank of New York Consumer Credit Panel and Equifax (Published in TheUpshot, NYT, August 31, 2015)
MOST important reason

Students receive credentials they have earned!
• **The ONLY** national solution to provide the ability to exchange course and grade data for awarding degrees.

• **Supporting your student success** initiatives by helping to increase both associate and bachelor degree attainment

• **Alleviating the workload** for community colleges and universities in the reverse transfer process.
Why A National Solution?

• Most students are mobile
  – 54% of enrollments (transfer ins and outs) at a typical institution, on average, are mobile at any given time

• Successful students are more mobile

• Transfer patterns are complex
  – $\frac{1}{4}$ of all transfers move between states

Reverse transfer can make the difference
How does Reverse Transfer work?

1. **4 YEAR**: Send student & course-level data
2. **NSC**: Receive course-level data, Track reverse transfer degrees
3. **2 YEAR**: Award reverse transfer degrees

The process involves three main stages: sending data, receiving and tracking data, and awarding degrees.
What can the Clearinghouse’s Reverse Transfer do for you?

- **Alleviate the workload by** filtering for associate degrees
- **Process the students on your timeline by downloading** cumulative student data when **you are ready** to evaluate for the semester
- **Easily access** the student’s information when they call to ask, when can I get my degree?
- **NO shuffling** through different types of transcripts trying to figure out is the student is physically transferring to your institution or is it a reverse transfer student.
- **Your trusted and secure place** for all the reverse transfer students data
What can the Clearinghouse’s Reverse Transfer do for you?

- Help you increase your transfer student retention and graduates
- Opportunity to offer Reverse Transfer to **ALL your transfer students** no matter where they transferred from across the nation
- **One file** submission of course grade data from sending institution
- No need to send transcripts throughout the semester
1. Sign a participation agreement
2. Work with your partner institutions to participate
3. Establish a Reverse Transfer account

Best of All, Reverse Transfer Is Free!

Become Part of the National Solution Today!
Transcript Services

Your Trusted Source for Postsecondary Transcript Services
• It is our goal to provide you relief from administrative burdens and costs related to the ordering and fulfillment of transcripts by easing the process and continuing to align ourselves with Strategic Partners such as Ellucian

• With nearly 1,000 schools participating in Transcript Services, we strive to continue to make your transcript process easy by providing FAST, FASTER, and FASTEST service
### The Transcript Process and Benefits are Based on Your Needs

<table>
<thead>
<tr>
<th>FAST ONLINE ORDERING</th>
<th>FASTER AUTOMATION</th>
<th>FASTEST FULL INTEGRATION</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Your Needs</strong></td>
<td><strong>Your Needs</strong></td>
<td><strong>Your Needs</strong></td>
</tr>
<tr>
<td>- No internal IT resources required</td>
<td>- Limited development by your SIS experts</td>
<td>- IT/SIS resources for connections/configurations</td>
</tr>
<tr>
<td>- Your required effort (guided by your Clearinghouse implementation rep)</td>
<td>- Your required effort (guided by your Clearinghouse implementation rep)</td>
<td>- Your required effort (guided by your Clearinghouse implementation rep)</td>
</tr>
<tr>
<td>- Implementation Time: In as little as a day</td>
<td>- Implementation Time: In as little as two weeks</td>
<td>- Implementation Time: 45 days</td>
</tr>
<tr>
<td><strong>Your Benefits</strong></td>
<td><strong>Your Benefits</strong></td>
<td><strong>Your Benefits</strong></td>
</tr>
<tr>
<td>- 24/7 online ordering with fee collection</td>
<td>- Personnel resource savings</td>
<td>- Full integration with your SIS</td>
</tr>
<tr>
<td>- Eliminates processing/filing of paper requests</td>
<td>- Reduced transcript fulfillment time</td>
<td>- Automates every processing step</td>
</tr>
<tr>
<td>- Real-time reporting</td>
<td>- Automated exchange of order and status data between NSC and your SIS</td>
<td>- Automatic printing of paper transcripts</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Savings in paper, postage, and personnel costs</td>
</tr>
</tbody>
</table>
Integration Options

- eTranscripts with Ellucian integration
- PeopleSoft/Campus Solutions Integration
- API integration for any SIS
Transcript Delivered In Minutes

14 minutes: Order placed, consent form complete, and PDF ready to be securely picked up!

Electronic Transcripts sent out of network are available for download up to 30 days. Transcripts through ETX will be available for 180 days. After the expiration period is reached in both cases, the Clearinghouse permanently removes the transcript from our servers.
OFFICIAL TRANSCRIPT

DEGREES CONFERRED:
B.A. BACHELOR OF ARTS WITH GENERAL HONORS GEOGRAPHY/ENGLISH
JUNE 11, 2007

PROGRAM START QUARTERS:
AUTUMN 2003 UNDERGRADUATE

TRANSCRIPT NOTATIONS:
PREVIOUS INSTITUTIONS ATTENDED
STATE UNIVERSITY LAB HIGH SCHOOL, NEW YORK, NY, 2001

ACCREDITATION:
PLACEMENT (pre-calculus) passed AUTUMN 2001
PLACEMENT ELEMENTARY FRENCH 105 AUTUMN 2003

AUTUMN 2003 BACHELOR'S
FRENCH 210 INTERMEDIATE FRENCH-1
100 B-
HUMA 100 GREEK THOUGHT AND LITERATURE-1
100 B-
MATH 131 CALCULUS-1
100 B-
PHED 097 PHYSICAL EDUCATION
000 P
SOC 145 ECO ETHICS/ECONOMICS, THEORY
100 C
TOTAL UNITS TAKEN
400

WINTER 2004 BACHELOR'S
FRENCH 210 INTERMEDIATE FRENCH-2
100 A-
HUMA 111 GREEK THOUGHT AND LITERATURE-2
100 B-
MATH 131 CALCULUS-2
100 C
PHED 097 PHYSICAL EDUCATION
000 P
TOTAL UNITS TAKEN
400

SPRING 2004 BACHELOR'S
FRENCH 210 INTERMEDIATE FRENCH-3
100 B-
HUMA 111 GREEK THOUGHT AND LITERATURE-3
100 B-
MATH 131 CALCULUS-3
100 C
PHED 097 PHYSICAL EDUCATION
000 P
TOTAL UNITS TAKEN
400

JUNE S DOE

WINTER 2005 BACHELOR'S
HIST 111 121ST CIVILIZATIONS
100 B-
HIST 210 BIBLICAL HUMANITIES
100 A-
HIST 210 HISTORY OF WESTERN CIVILIZATION-1
100 B-
TOTAL UNITS TAKEN
390

SPRING 2005 BACHELOR'S
HIST 210 BIBLICAL HUMANITIES
100 A-
HUMA 211 HISTORY OF WESTERN CIVILIZATION-3
100 B-
TOTAL UNITS TAKEN
390

AUTUMN 2005 BACHELOR'S
HIST 213 CULTURAL GEOGRAPHY
100 A-
HIST 213 HIST MEXICO-BOLIVIA 1500-1600
100 A-
HIST 240 HISTORY OF EUROPE 1400-1600
100 A-
PHED 111 PHYSICAL SCIENCE-1
100 A-
TOTAL UNITS TAKEN
400

WINTER 2006 BACHELOR'S
HIST 213 HIST MEXICO-BOLIVIA 1500-1600
100 A-
HIST 213 HIST MEXICO-BOLIVIA 1500-1600
100 A-
HIST 240 HISTORY OF EUROPE 1600-1800
100 A-
PHED 113 PHYSICAL SCIENCE-3
100 A-
TOTAL UNITS TAKEN
400

SPRING 2006 BACHELOR'S
HIST 213 HIST MEXICO-BOLIVIA 1500-1600
100 A-
HIST 213 HIST MEXICO-BOLIVIA 1500-1600
100 A-
HIST 213 HIST MEXICO-BOLIVIA 1500-1600
100 A-
PHED 113 PHYSICAL SCIENCE-3
100 A-
TOTAL UNITS TAKEN
400

09/08/2008
1 OF 2

John Smith
Registrar
Transcript Services Redesign

• Major enhancement is the website is now mobile responsive resulting in availability on desktop, tablets and MOBILE.

• Goal is to decrease number of fields and keystrokes so total processing time is cut 50%.

• New student ordering experiences was shown at ACCRAO and Ellucian Live garnering positive comments and requests for participation in MVP.

• Scheduled for testing in July, 2018. General Availability is scheduled for the fall of this year.
Welcome Page

Our school will be closed from April 1, 2018 through April 7, 2018 for spring break. We will resume the processing of transcripts on April 8, 2018 for any transcripts that are not fulfilled automatically over break.

Clearinghouse Information

Payment will be accepted, if a cost is involved, with any major credit or debit card. Your credit or debit card is not charged until your school sends your transcripts(s). However, if you use a debit card, your bank may put a hold on your funds when we pre-authorize your payment. If you have questions on the pre-authorization, please contact your bank.

- Adding customized text to the “Welcome” page is available to Institutions
- Customized headers will be generated based on Information provided in the school profile. If none exist, a generic NSC header will be displayed on each page.
Questions are being asked so if the answer is no, the required fields remain hidden helping to reduce the number of fields on a page. Example: Has your name changed since attending school?

The action button, i.e. Continue, is not activated until all of the field validations are met ensuring all of the data is entered and valid.
Address information will be used on future pages to save the user from having to type the same information two or three times.
According to the Family Educational Rights and Privacy Act (FERPA), in certain instances, schools must obtain the student’s permission in order to release information from his or her educational records. The type of consent form that is required is determined by recipient type.

- If additional information is needed for a recipient, the fields will be displayed after that recipient is chosen decreasing number of clicks and fields.
- “Type ahead” is used for the school selection field.
Once a delivery method is selected, a summary of the fees associated with that method will be displayed.
The goal is to pre-populate fields as much as possible to save keystrokes. In this example, the recipient name is pre-populated.

Only the fields needed to complete transaction are displayed on a page. In this example, email address is required since it is an Electronic delivery method so address is not shown.
Only the fields needed to complete transaction are displayed on a page. In this example, recipient address is required since the delivery method is mail.

If the recipient is the student, the address fields will be pre-populated with the Contact page field values.
Like other sites where purchases are made, a shopping cart is available to review the order.

A shopping cart icon is located in the header as a type of navigation to this page.

The student may “Add Recipient” when another transcript is desired.
- NSC offers paperless and paper consent forms. However, paperless are being recommended.
- Student is required to sign their signature in the supplied box.
**Payment Page**

Confirm Order and Checkout

Payment Details  All fields required, unless otherwise indicated

Accepted Credit Cards:

- Visa
- Mastercard
- American Express
- Discover

<table>
<thead>
<tr>
<th>Cardholder Name</th>
<th>Card Number</th>
<th>Security Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sally Student</td>
<td>4111111111111111</td>
<td>123</td>
</tr>
</tbody>
</table>

Expiration Date

- Month: March
- Year: 2021

Do you want to use your contact address as your billing address? Yes  No

Address 1

- 123 MAIN STREET
- Street number and name or PO Box

Address 2

- Building, campus box, floor, apt, suite (Optional)
- Zip/Postal Code: 20171
- City: HERNDON
- State/Territory/PO Box: Virginia
- Country: United States

Total Fees for Order: $19.50

- Payment page is now created by NSC so the look and feel of the site is expressed on this page.
- First Data is our partner and accepts the credit card number so they are not stored on NSC servers.
- Apple Pay will be added as a payment time in a future release offering a popular payment type for students.
Final page in the transcript ordering process
- Summarizes the requestor (i.e. student) information as well as the recipient delivery method and fees.
Key Differentiators

• Transcript Services is provided at no cost to your institution
  – No minimum usage fees, implementation fees or maintenance fees
• Gold standard digital security and document control
• Secure level 2 PCI compliant delivery of transcripts
• FISMA, SOC2, and PCI compliant print facility that prints, inserts, and mails transcripts
• Touch-free transcript delivery
• Non Profit Status
NSC SecurePrint is...
Secure

- **Secure Production**
  - Produced in a FISMA-certified and SOC2 compliant facility
  - Uses same information security standards required for stock/bond certificate printing

- **Secure paper**
  - Defensa Premium Bond 24 lb. paper
  - Embedded visible color fibers and invisible fibers
  - Copy- and scan-evident features
  - “UNAUTHORIZED COPY” pantograph and uncopiable chain link fence watermark

- **Secure print application**
  - Printloc toner adhesion: Ink soaks into the paper, instead of sitting on top of it
  - Color reactivity to bleach, oxidizers, acids and bases, and other solvents

- **Secure mail**
  - Mailed in tamper-evident envelopes
Flexible

- Monday through Saturday production and mailing
- Standard First Class Mail and Express shipping
Configurable

- Branded with your seal and logo
- Customizable cover letter
- Include your transcript legend and attachments
- Portrait or landscape layout
- Black and white or color printing
Sample Transcript Package
How Does NSC SecurePrint Work?

Student or Alumnus

Submits a transcript order online

Your Institution

Fulfills the order with a PDF transcript

Print Facility

Updates order status and sends print job

Prints, inserts, and mails the transcript
Pricing

• Your institution can elect to cover each of the following costs for your students

• Shipping and handling (per order)
  – Black and white: $ 1.80
  – Color: $ 2.40

• Express Delivery (per package)
  – Domestic: $27.00
  – Canada and Mexico: $47.00
  – International: $60.00
**StudentTracker® Premium Service**

**Output**
- **ANALYSIS READY**
  Transforms detail report into **one row per student**

**Efficiency**
- **REQUEST FILE RE-RUN**
  Saves time by re-running instead of re-loading file; up to four times within 365 days

**Comparisons**
- **SIGNATURE AND SNAPSHOT REPORTS**
  Uses your institution’s data to compare your institution with national sectors

**Integration**
- **DATA VISUALIZATION**
  Integrates reporting with graphics for more compelling stories
Analysis-Ready File  Transmitted via Your Secure FTP Account

Quantitative
Calculates the number of days between different educational milestones

Organized
One student per row enables concurrent enrollment to be easily identified

Comprehensive
Eight consecutive years of reporting

Standardized Logic
Retention and persistence
Ability to Re-Run Request Files

- **Save time** by re-running files up to four times over one year
- **Follow** your student cohort for several years to see comprehensive outcomes
- **Ensure flexibility** so any user can re-run cohort files previously submitted
- **Retain your filenames** to ensure you are re-running the correct file
Download Stored Institution-Level Reports

- Completions
- Persistence & Retention
- National numbers for your school sector
Immediate Collaboration: Visualizations

Access visual representations of your StudentTracker Request File results and our Research Center’s Completions Report

Identify influences impacting your student retention and persistence so you can make the necessary alterations

Tell a story through visualization that you can share with your colleagues and senior leadership team
StudentTracker®
Premium Service

VALUE-BASED PRICING

$1,995
> 10,000 students (all levels)

$1,295
4,000 – 10,000 students (all levels)

$795
< 4,000 students (all levels)
What’s on the Horizon?

• Veterans Compliance Reporting Re-Engineering Project

• My Hub
Veterans Compliance Reporting Re-Engineering Project
A national initiative to streamline veterans compliance reporting, certification, and recertification

Converts today’s veterans compliance reporting process into a streamlined solution.
Institution

One dimensional:
- Compliance
- Student success
- Accountability
- Program evaluation
- Credential production
- Credential verification
- Reporting & analysis

Multi Dimensional:
- Pathways
- Program insights
- Student optimization
- ROI investment

Education
Enrollment
Transcripts
Co-Curricular
Certs/Dig. Cred.
Diplomas

Student Profile
Authenticated
user
Detailed profile

Career
Pathways
Research
Skills

Resume
Portable portfolio
Competencies
Experiential
record
How Can We Help You Reach Your Goals?

• Get the most benefit from the Clearinghouse services by using them all
• Are there any services that your school is not yet using?
• Would you like more information on any features of current services?
Help Us Help You:

Share what you learned today with others on your campus *and*
reach out to your Regional Director, to schedule an individual review