Reverse Transfer
Summer TACRAO
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National Student Clearinghouse

Agenda

- What is Reverse Transfer?

- Best Practices

- File Formatting & Typical File Issues
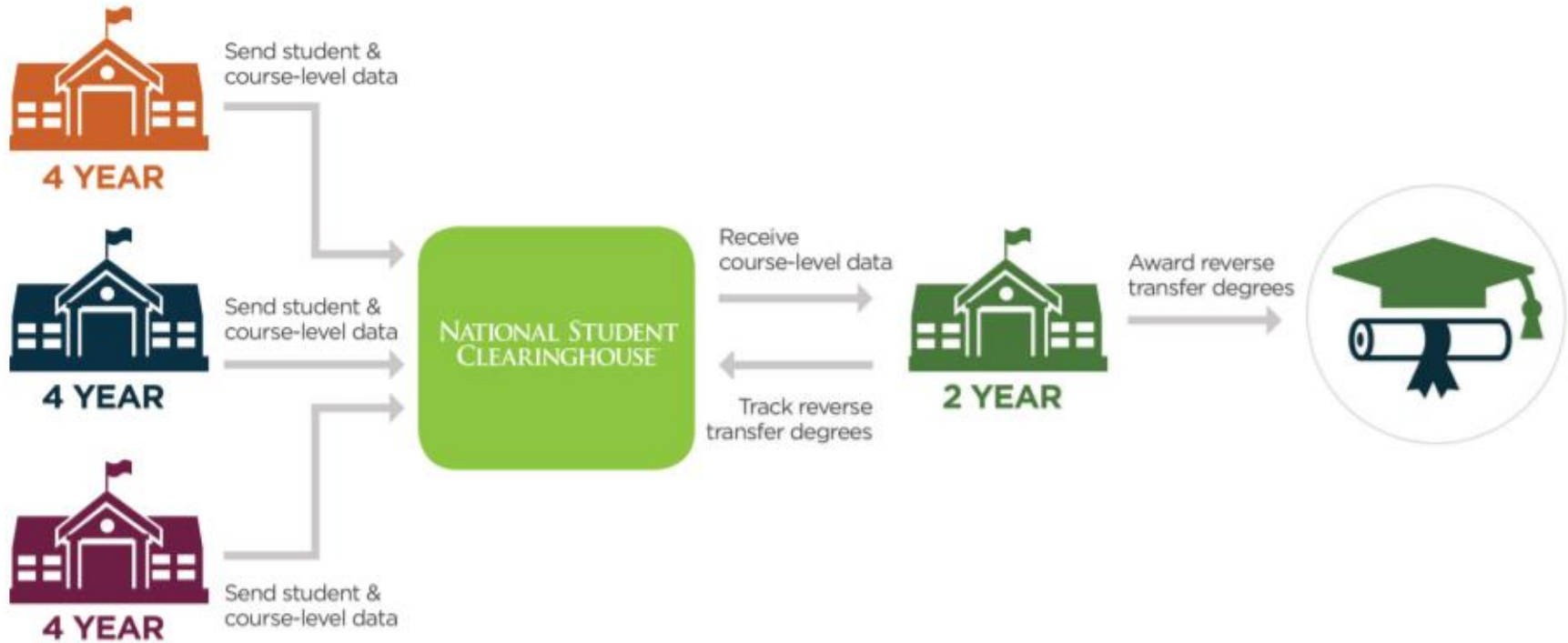
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What is Reverse Transfer?

Common Terminology

- DGI (Degree Granting Institution)/Data Requester

- Host/Data Provider

- Course Exchange

How does Reverse Transfer work?

Managing FERPA

- NSC worked with the AACRAO public policy group to come up with approved FERPA verbiage:

  - *Do you consent to allow your academic records to be shared with the college(s) you previously attended for the sole purpose of considering eligibility for awarding of an Associate degree or other credential? The records may be released and re-evaluated in multiple terms until a credential is conferred.*

- AACRAO does support an 'opt-in' model so this question should be presented with a 'yes' or 'no' (or similar) selection for the student to actively consent.

- https://help.studentclearinghouse.org/reversetransfer/knowledge-base/managing-ferpa/

Reverse Transfer Efficiency Act of 2023

- Reintroduction of earlier bill

- Seeks to amend *the Family Educational Rights and Privacy Act* to create a new exemption for sharing student education records between higher education institutions. The bill would allow a college or university to share a student's academic records with another institution that the student previously attended under the condition that the information is sent with the goal of conferring a degree.

Reverse Transfer Resources

Reverse Transfer Knowledge Base

- https://help.studentclearinghouse.org/reversetransfer/

Reverse Transfer FAQs

- https://help.studentclearinghouse.org/reversetransfer/knowledge-base/faqs/

Logistics

- Submitting Data
- Receiving Data
- Common Errors

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Reverse Transfer On-boarding Process – Data <u>Provider</u>

Return agreement to Clearinghouse

- Sign and return the Reverse Transfer (RT) agreement to: reversetransfer@studentclearinghouse.org

Reverse Transfer Kick-off Call

- The Clearinghouse Implementation and Product teams conduct a joint call with the Data Provider (Host Institution).
- Clearinghouse provides an overview of action items and resources.
- Data Provider outlines the on-boarding timeline.

On-Boarding Process

- Implementation Team manages the onboarding process with the Data Provider contact according to the on-boarding timeline.
- This includes FTP or SPEEDE set up and Data Provider file testing.

Reverse Transfer On-boarding Process – Data <u>Provider</u>

Data Provider creates course grade file

- Based on the Reverse Transfer implementation guide framework, the Data Provider builds a test file.
- The Data Provider uploads file(s) to their secure RT-FTP folder or pushes the file to the SPEEDE server.

Analysis of Reverse Transfer file

- The Reverse Transfer application performs structural and field validations on the submitted test file.
- If the file does not pass validation checks, the Data Provider is notified via email, and collaborates with the Implementation team until a production-ready file is achieved.

Reverse Transfer On-boarding Process – Data <u>Requestor</u>

Return agreement to Clearinghouse

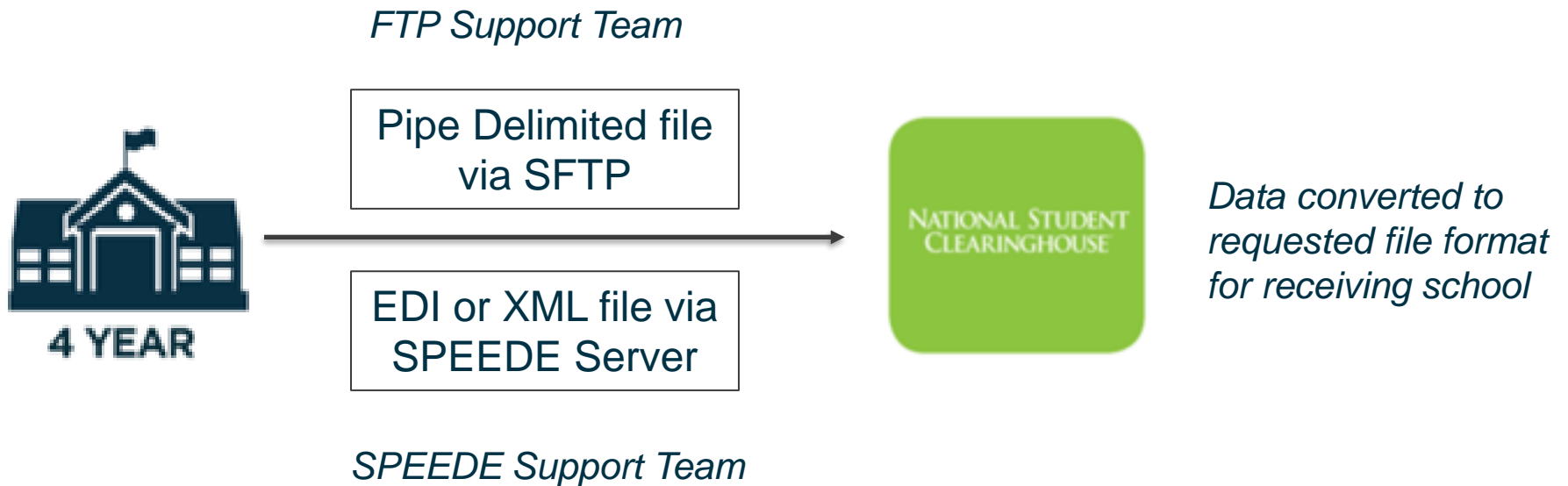- Sign and return the Reverse Transfer (RT) agreement to: reversetransfer@studentclearinghouse.org

Reverse Transfer Kick-off Call

- The Clearinghouse Implementation Team conducts call with the Data Requestor (DGI Institution).
- Clearinghouse provides an overview of action items and resources.
- Data Requestor outlines the on-boarding timeline.

On-Boarding Process

- Implementation Team manages the onboarding process with the Data Requestor contact according to the on-boarding timeline.
- This includes FTP or SPEEDE set up and Data Requestor file retrieval testing.

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Submitting Course Grade Data

FTP Support Team

Pipe Delimited file via SFTP

EDI or XML file via SPEEDE Server

SPEEDE Support Team

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Data converted to requested file format for receiving school

4 YEAR

Reverse Transfer File Formats

- Pipe delimited (via SFTP)

Example of a body record:

RTD1|7100003|123456789||John|S|Smith|Sr|19850814|12345 Somewhere Dr.||Someplace|VA|77396|US|703 999 9999|Someone@hometown.edu|Y|||||CHEM|1405|Intro Chemistry|Fall 2014|20140825|20141214|B|20141214|3|Regular Enrollment|y|Math|025|||888888|12131415|||||

- EDI and XML file formats (via SPEEDE server)
- Utilizes PESC Transcript standards

EDI and XML file formats

- EDI and XML are available for DGIs

- If you're a host and would like to create EDI or XML files, please email Rtsupport@studentclearinghouse.org

- Need to set up SPEEDE Account prior to sending us EDI or XML files (speedeserver.org)

Common File Questions and Issues

Common Program Questions

Should we submit data from all transfer students or only students from schools we have an articulation agreement with?

– The Clearinghouse encourages schools to submit data for all transfer students who have given consent to have their records exchanged. We will process your file and send the information to the appropriate two-year school, wherever it is in the U.S.

How is student consent obtained and tracked for reverse transfer?

– Obtaining and tracking student consent is handled outside of the Clearinghouse's solution by either the host institution or DGI. Host institutions only send course and grade data for eligible students via Reverse Transfer once consent is obtained.

– Managing FERPA is on the Reverse Transfer webpage.

Do I need to send the transferred courses back to the 2-year?

– No. You do not need to send transferred courses back to the originating 2-year school.

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Header Record Format

FILE SECTION 1 - HEADER RECORD

The Header Record is a single row in the file: **RTCD1|123456|00|20140924|FileName**

Field 1	Field 2	Field 3	Field 4	Field 5
Required	Required	Required	Required	Required
RTCD1	OPEID	Branch Code	Date	File Name

The Header record will always start with RTCD1.

Common File Header Issues (Data Provider)

- Not including RTCD1

  - Without the first field, the file cannot be identified for Reverse Transfer processes.

- Programming the header

  - every file should have same header RTCD1

  - Update the date on the file for each new file submitted.

- Combining Host OPEID and 00 (Branch code)

  - OPEID must be a 6-digit number

  - Separate Host OPEID and Branch Code by a pipe

Header Record Error

Student Reporting | Verification Services | Research Services | Transcript Services | Reverse Transfer | Student Look-Up | Members | Account Mgmt

Reverse Tran

File Submission Summary > **Validation Errors Detail Page for Submission Number: 41588**

Validation Errors Log

Organization Name: HOMETOWN UNIVERSITY
Service Account Number: 10034769
File Name: ErrorMessage_RecordType_length_4.TXT
Client File ID:

Section	Field Name	▲▽ Error Description	Proposed Solutions	Affected Line Numbers	Error Count
Body		Invalid Value	Must be RTCD1	1	1

Body Record Format

FILE SECTION 2 - BODY RECORD

The Body Record is generally multiple records/rows in the file.

Example:

RTD1|7100003|123456789||John|S|Smith|Sr|19850814|12345 Somewhere Dr.||Someplace|VA|77396|US|703 999 9999|Someone@hometown.edu|Y|60|||999999|CHEM|1405|IntroChemistry|Fall2014|20140825|20141214|B|2014 1214|3|Regular Enrollment|y|Math|025|3.5|3.7|888888|12131415|||||

Systems are required to submit their Host OPEID (see yellow highlight above).

Quick Start Guide:

https://studentclearinghouse.info/onestop/wp-content/uploads/QuickStartGuide.pdf

Common Body Record Issues

- The Body record will always start with RTD1 for <u>every</u> student record in the file.

- Missing fields or pipes OR too many pipes

- Invalid OPEID code for DGI *(The Clearinghouse can provide a list of OPEIDs)*

- Total earned transfer credit is less then zero

- First name/Last name contains special characters beside apostrophe or hyphen (' or -)

- SSN must be 9 digits

  - Do not include a hyphen (-) in between the numbers.

- Optional fields

  - Make sure to include a pipe for "null" optional fields.

Body Record Error

Trailer Record Format

FILE SECTION 3 - TRAILER RECORD

The Trailer Record is a single row in the file: **RTT1|99**

Field 1	Field 2
Required	Required
RTT1	**Record Count**

The Trailer record <u>will always</u> start with RTT1.

Record count must include/count the header and trailer records.

Total Records = Number of rows

Common Trailer Record Issues

- The Trailer record total is off by one
- Make sure to include the header record (row) and the trailer record (row) in the total trailer record count.

Trailer Record Error

Reports

- Host Reports

    – Number of Degrees
    – Number of Students

- DGI Reports

    – Number of Degrees
    – Number of Students

Q&A

- Questions
- Observations
- Comments