CANADIAN PESC USER GROUP MEETING MINUTES

Dates: Thursday, May 2 and Friday, May 3, 2013
Location: PESC Summit, San Diego

Thursday, May 2, 8:30 a.m. – noon Session

Attendees
Anthony Abbott       Career Cruising
Barry Billing        OCAS
Dorothy Chapman      University of Waterloo (by phone)
Jim Goodell          CEDS
Jaimi Groothuis      Parchment
Jam Hamidi           BC Campus
Doug Holmes          OUAC
Janeen Hoover        Conestoga College
Greg Hughes          OCAS
Bill McKee           OCAS
Kelly McMullen       Apply Alberta
Brian Patton         OUAC
Trudy Sykes          OUAC
Jim Wager            ScripSafe
Leisa Wellsman       OUAC

1. Attendees introduced themselves.
2. Bill reviewed the scope of our initiative, noting key items such as payment, the ability to receive “in progress” transcripts during the academic year (though not necessarily interim grades), Service Level agreements, consent from student, privacy, and secure standard based transport mechanisms.
3. There was discussion around whether the entire User Group needed to agree to these elements before any trading could begin or, as entities are ready to trade, these items could be defined and artifacts created for the benefit of all who will follow later.

4. It was felt that we want some agreement among trading partners for consultation and agreement on processes such as recommended transport, definitions, security protocols, and alignment issues (e.g., sending of Social Insurance Number). We could add to the Project Charter additional assumptions that we will collaborate, document and share the processes that some of us already use. Trudy cited OUAC’s work with OCAS on the eTMS project as an example of documents that could be shared, e.g., Statement of Work, high level business requirements, privacy and consent statements.

**RECOMMENDATION:** Those best placed to lead the others are the four application centres: Apply Alberta, BC Campus, OCAS and OUAC. If others are also ready to join, that is even better. Once we have a successful pilot, those starting afterward will find it easier to create from something that’s already there, and to be guided by those with experience.

**ACTION:** OUAC and BC will start talking about postsecondary transcript exchange at end of summer 2013.

**ACTION:** Currently, OUAC receives electronic transcripts from Douglas and Kwantlen via the Texas Server, although these institutions are part of BC Campus’s hub. Jam will talk to Douglas and Kwantlen about moving away from the Texas Server.

**ACTION:** AB, BC and OCAS use web services and will arrange test exchanges among themselves to see if this works. (Depending on the timing, they may be able to leverage some of the work done by the PESC CDS (Common Data Services) task force.) They will share the results with OUAC, who is not yet using web services.

5. To move our agenda forward, the following suggestions were made:
   a. Ask provincial application centres what their priorities are
   b. For provinces without application centres, encourage them to use PESC standards to get their high school transcripts to their universities so that groundwork is laid to send high school transcripts outside of the province
   c. Provinces without centralized service providers like provincial application centres could consider multiple options including vendors who support the PESC standards.
   d. Looking at statistics to determine where the likely enrolment coming from (e.g., between provinces at the high school or postsecondary? which provinces?)

6. Discussion ensued about high school versus postsecondary transcripts.
   a. It was felt that the high school transcript idea is likely what drew the interest of the smaller provinces. Kelly noted that the high school transcript is more standardized, making it easier to work with. Also, the trading volume would presumably be greater. She thinks they would be Alberta’s priority. Bill noted that CMEC (Council of Ministers of Education of Canada) approval/support would help with developing the high
school transcript trading. Additionally, our recent initiative to invite the high school vendors to our User Group should spur interest in other provinces.

b. However, some provinces may be more interested in postsecondary transcripts, therefore both should accommodated in our collaborations and discussions. Trudy noted the growth in demand for transcripts for Graduate school applicants. OUAC also supports Ontario’s professional schools (e.g., medicine, law). Also, postsecondary pathways and mobility is also very big in Ontario right now. OUAC is interested in high school transcripts, but the main interest is probably postsecondary transcripts. It was noted that BC has not yet done high school transcripts, only postsecondary.

**ACTION:** Barry and Kelly will review high school transcript schema for variances by end of May and report back to the group with recommendations if variances are found.

**RECOMMENDATION:** Attendees will attempt to get statistics by applicant (not application) on high school and postsecondary transfers in to each province, as well as who already trades with whom, what they exchange, and how.

7. Trudy noted that OUAC has a proprietary process with CREPUQ (who sends XML, but not PESC) to get CEGEP transcripts from Quebec. It works for now, though will likely change in future. How difficult might it be for them to change to the PESC schema? Unfortunately, these transcripts are a hybrid of high school and postsecondary, plus there is the language issue.
   a. It would be good to have Quebec at the table so that desire for change could come from within the province. Early on, Quebec had expressed a preference for PDF trading, but perhaps if our group got a process in place, they may be encouraged to follow.
   b. Jam has looked at a CEGEP test file from OUAC and it is vastly different from the PESC standard. PESC tags are all in English, but CEGEP tags in their XML are all in French. However, could OUAC’s current work in extracting the data they require form the basis for some sort of crosswalk table? Or could the whole French transcript be sent as a PDF attachment and receivers continue to extract what is needed?
   c. Would New Brunswick’s participation be beneficial to working with CREPUQ?
   d. This issue will require further discussion and eventually a statement on how we deal with this.

**ACTION:** OUAC will contact Yvon Bousquet at CREPUQ. It would be good to have as many bilingual people at the table as possible for future discussion, including Jam and Pascal.

8. Discussion moved on to the new version of the National Transcript Guide being championed by ARUCC.
   a. The group agreed that the new guide should mention the use of PESC standards, as well as that electronic transcripts should not contain less information than the
hardcopy transcript. Ideally, they should match, although more information on an electronic transcript is acceptable.

**ACTION:** Janeen will ask Clay MacDougall from Humber College who the CRALO representative is on the ARUCC Transcript Guide Committee and follow up on this item.

**ACTION:** OUAC will ask Josie Lalonde to do likewise to find out who the OURA representative is.

b. Would it make sense to have the EDI mapping terms (Mandatory, Optional, Conditional), the PESC schema terms, and the National Transcript Guide terms (Essential, Recommended, Discretionary, Not Recommended) all match? Or at least reference the variances in the new Guide?

**ACTION:** Kelly will send Janeen the terms PESC uses.

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**Friday, May 3, 8:30 a.m. – 10:00 a.m. Session**

**Attendees**

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1. The group discussed a conceptual delivery model, including the features and attributes that would need to be decided upon.
   a. The guiding principle of the service model would be to integrate across provinces using standards, scalable to various purposes with different use cases and business models. The key is to provide a service to students while being as consistent as possible by using PESC, National Transcript Guide, etc.
   b. Other features that would be helpful to define include general minimum “recommendations for participation”, such as data sharing agreements, a payment model (where applicable), and privacy statements that everyone can agree to and build on top of.
   c. We also need to define who is making the request. Is it the student? The institution? Consent is important, as is the purpose of consent (e.g., this transcript is in support of an application for admission or a Letter of Permission credit).
d. Jam noted that BC is looking at implementing a student-initiated request ("Request for Transcript"); currently BCCampus merely passes batches of transcripts among BC universities.

**ACTION:** All four application centres to create and share their workflows for transcripts. This will allow us to start to work towards a visual representation of the service model we are working towards.

2. Where do we go from here?
   a. We need to delegate the work, starting with recommendations to the larger group from our work at this Summit, for their comment. This is how other PESC user groups work. Smaller workgroups can take on initiatives and report back to the larger group.
   b. Over the course of our future conference calls, we should set some goals for the Fall PESC Summit since that’s the next time we will meet in person. We need the right people at the table to move forward since only so much can be done over the phone.
   c. We will also continue to pursue funding, perhaps for travel expenses and possibly through CMEC.

**ACTION:** Dorothy will look up the documentation (an accord) that supports the interprovincial mobility of students. This could help Jam, who likely won’t get government support for an initiative for out-of-province transcript exchange because BC Campus is government funded.

**ACTION:** The notes from the San Diego PESC Summit, including our actions and recommendations, will be presented to the rest of the User Group via SugarSync so that we can get reactions and have further discussion at our May 23, 2013 conference call. Bill will cancel our May 9th call.

**SUMMARY OF ACTIONS AND RECOMMENDATIONS**

| **RECOMMENDATION:** | Those best placed to lead the others are the four application centres: Apply Alberta, BC Campus, OCAS and OUAC. If others are also ready to join, that is even better. Once we have a successful pilot, those starting afterward will find it easier to create from something that’s already there, and to be guided by those with experience. |
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