Notes from September 27, 2006 PESC Conference Call on Development of XML Standard for the Application for Admission

Discussion on the call was begun by Adriana Farella at 5 minutes after the hour.

**Announcement:** After some prompting, Adriana advised the group that she had completed a 26 mile walk in Long Beach, California for support of the fight against breast cancer this past weekend.

**Action Items by the Middle of Next Week:** Adriana again asked everyone on the Workgroup to send her the following information:

a. Relationship codes or types that are used at their company or school to show linkage from family member to applicant

b. What information you collect on your application about family members

c. What information you collect on your application about legacies

d. Is there a need to collect marital information about the family members?

**Residency for Tuition Purposes:** Since there were only six participants on the call today, we did not make too much progress on this item. However, for schools that differentiate between residents and non-residents for tuition purposes, it is important to collect sufficient information in the application for admissions process to make at least an initial determination of residency for fee purposes.

Typically based on the age of the applicant, an initial assumption is made to determine whether the student is a dependent or independent person.

If the student is above a certain age, it is assumed that the student is independent and information about the applicant’s legal permanent residency status is collected to determine the applicant’s residency category for fee purposes.

If the student is below a certain age, it is assumed that the student is a dependent person and information about a parent’s or legal guardian’s legal residency status is collected to determine the residency category for fee purposes of the applicant.

If the student’s age falls between the two ages noted in the two paragraphs above, then additional information may sometimes be requested so that it may be determined if the student should be classified as a dependent or an independent person.

To make this determination, additional information for the applicant such as earnings of the applicant, full-time or part-time employment status, tax returns, etc., may be requested. Or, information from tax returns may be requested from the parent or guardian.
If it can be determined from the application that the applicant is a dependent or independent person, then the residency information from either the applicant or the parent or guardian may be requested. If not, then it may be necessary to request the residency information from both the parent or guardian and the applicant.

Then, based on that determination, the residency information is requested for either the applicant or the parent or guardian.

Information requested to make the residency determination may include (in addition to information already requested from the applicant in other parts of the schema):

State of permanent residence

County of permanent residence (used for colleges where there is a fee differential based on the county of permanent residence, and for colleges near a state border that have reciprocal tuition agreements with counties adjacent to or near the border)

Driver’s License Information: Issuing State; Date of Issue

Length of Permanent Residence in the state/county: Recommend a specific date when the person became a permanent resident, but the date could be either the year only, or the year and month only if the person had been a resident for a long time.

Information about state income taxes paid in a specified year

Information about federal income taxes paid and the filing status and the dependents listed if residency is based on the parent or guardian

Homestead exemption status if the person is a property owner

Next Discussion Item: On the next call, we will continue discussion on data collected regarding residency for tuition purposes.

Action Item either before or during the next call: Please be prepared to discuss the data items collected at your school (or your clients’ schools) on the application for admission that are used to determine the residency status for tuition purposes.

Today’s call ended at 35 minutes after the hour.

Next Call: The next call will be Thursday, October 5th at noon Eastern (11 am Central, 10 am Mountain, 9 am Pacific) Daylight Saving Time. Call 800.508.7631; Pass code *9976409*. 
Notes from September 27, 2006 Call of PESC XML Admissions App Workgroup

On today’s call were

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<thead>
<tr>
<th>Name</th>
<th>Title</th>
<th>School/Company</th>
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<tbody>
<tr>
<td>Kay Anderson</td>
<td>Principal Product Manager</td>
<td>Oracle Corporation</td>
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<tr>
<td>Larry Borgione</td>
<td>Product Manager, Oracle Campus Solutions Product Strategy</td>
<td>Oracle Corporation</td>
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<tr>
<td>Adriana Farella</td>
<td>Director, Product &amp; Industry Strategy</td>
<td>Xap Corporation</td>
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<tr>
<td>Clare Smith-Larson</td>
<td>Coordinator, Project EASIER and Chair of AACRAO SPEEDE Committee</td>
<td>Iowa State University</td>
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<tr>
<td>John T. “Tom” Stewart</td>
<td>College Registrar (Retired)</td>
<td>Miami Dade College (FL)</td>
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<tr>
<td>Bill Zimmer</td>
<td>Advisory Consultant</td>
<td>SunGard Higher Education</td>
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