



Decision #26: Maintaining Historical Student Records for UW Colleges

November 8, 2018

DECISION:

Continuing Education, Outreach & E-Learning (CEOEL) will assume responsibility for the contractual relationship with current UW Colleges' (UWC) service provider, Credentials, and expand Credentials' service level to provide both electronic and hard copy transcripts.

CEOEL will be responsible for the management of the UWC historical student records costs out of the revenue generated by the transcript fee. CEOEL acknowledges that over time the revenue will decline and could reach a point where the revenue is less than expenses. At that time, CEOEL will propose an increase in the transcript fee sufficient to cover costs.

CEOEL will manage the historical debt in their bursar's office by receiving funds monthly from the collection agencies, depositing it, and clearing the students' accounts of transcript holds by coordinating with the office managing historical records.

Background

Interim Vice President for Student and Academic Affairs, Karen Schmitt, reviewed the proposal put forth by CEOEL and accepted it as a formal project decision.

Next Steps

During the transition year of 7/1/2018-7/1/2019, UWC staff will continue to provide services, as outlined in MOUs with the seven receiving institutions.

- Records of active students as of 7/1/2018 will be transferred to designated receiving institutions
- Records of inactive students prior to 7/1/2018 will be managed by CEOEL

CEOEL Registrar, Dan Kellogg, will work with the Registrar Functional Team, chaired by Dave Kieckhafer, to identify next steps for managing historical records. Historical records consist of electronic PeopleSoft records housed in UWC SIS, PRISM, electronic PDFs housed in UWC's ImageNow database, and physical paper and microfiche records housed in UW-Madison libraries.

UW Colleges has a relationship with the vendor, Credentials, to provide transcript processing services. CEOEL will work with Credentials on a service agreement to extend this relationship for processing transcript requests.

The Registrar Functional Team, the Bursar Functional Team, and CEOEL will convene to clarify process for clearing historical debt and communicating balance/hold removals with students and the CEOEL Registrar's Office.

CEOEL will work with UW System to create a transcript landing page identifying CEOEL as the custodian of UWC records for students enrolled prior to July 1, 2018. The website will include information on how former students can place transcript requests. The seven receiving institutions will link to this landing page and UW System will work with CEOEL to communicate this site to former students.

UWC is using PeopleSoft 9.0 and they will not be upgrading the system. Support for 9.0 ends in December 2019. UW System will confirm whether PRISM can continue to exist as a non-transactional database. If there were any concerns or potential security issues, a decision on whether to image these records electronically (if PRISM were retired) would be required.

UWC recently formed a UW Colleges Records Project Committee to determine the appropriate retention and disposition of UW Colleges physical and electronic records. Charles Clark is the project lead. The CEOEL Registrar will provide status updates of the management of historical transcript records to the project lead.