



MISSOURI REVERSE TRANSFER
seamless associate degree completion

MISSOURI REVERSE TRANSFER IMPLEMENTATION STEPS

TABLE OF CONTENTS

	<u>Section</u>
HB 1042	1
MRT Policy	2
Glossary of Terms & FAQs (RTCs)	3
MDHE Activities	4
Institutional Activities	5
Student Activities	6
Communication	7
IT Resources	8
Data Collection & Assessment	9
Contact Resources	10
Appendices	11

HB 1042

SECOND REGULAR SESSION
(TRULY AGREED TO AND FINALLY PASSED)
SENATE COMMITTEE SUBSTITUTE FOR
HOUSE COMMITTEE SUBSTITUTE FOR
HOUSE BILL NO. 1042
96TH GENERAL ASSEMBLY

4431S 04T

2012

AN ACT

To repeal sections 173.005, 173.040, 173.606, 173.608, 173.612, 173.614, 173.616, 173.618, 174.332, and 174.450, RSMo, and to enact in lieu thereof ten new sections relating to higher education, with a penalty provision.

Be it enacted by the General Assembly of the state of Missouri, as follows.

Section A. Sections 173.005, 173.040, 173.606, 173.608, 173.612, 173.614, 173.616, 173.618, 174.332, and 174.450, RSMo, are repealed and ten new sections enacted in lieu thereof, to be known as sections 173.005, 173.040, 173.606, 173.608, 173.612, 173.614, 173.616, 173.618, 174.332, and 174.450, to read as follows:

173.005. 1. There is hereby created a "Department of Higher Education", and the division of higher education of the department of education is abolished and all its powers, duties, functions, personnel and property are transferred as provided by the Reorganization Act of 1974, Appendix B, RSMo.

2. The commission on higher education is abolished and all its powers, duties, personnel and property are transferred by type I transfer to the "Coordinating Board for Higher Education", which is hereby created, and the coordinating board shall be the head of the department. The coordinating board shall consist of nine members appointed by the governor with the advice and consent of the senate, and not more than five of its members shall be of the same political party. None of the members shall be engaged professionally as an educator or educational administrator with a public or private institution of higher education at the time appointed or during his term. Moreover, no person shall be appointed to the coordinating board who shall not be a citizen of the United States, and who shall not have been a resident of the state of Missouri two years next prior to appointment, and at least one but not more than two persons shall be appointed to said board from each congressional district. The term of service of a

member of the coordinating board shall be six years and said members, while attending the meetings of the board, shall be reimbursed for their actual expenses. Notwithstanding any provision of law to the contrary, nothing in this section relating to a change in the composition and configuration of congressional districts in this state shall prohibit a member who is serving a term on August 28, 2011, from completing his or her term. The coordinating board may, in order to carry out the duties prescribed for it in subsections 1, 2, 3, 7, and 8 of this section, employ such professional, clerical and research personnel as may be necessary to assist it in performing those duties, but this staff shall not, in any fiscal year, exceed twenty-five full-time equivalent employees regardless of the source of funding. In addition to all other powers, duties and functions transferred to it, the coordinating board for higher education shall have the following duties and responsibilities:

(1) The coordinating board for higher education shall have approval of proposed new degree programs to be offered by the state institutions of higher education;

(2) The coordinating board for higher education may promote and encourage the development of cooperative agreements between Missouri public four-year institutions of higher education which do not offer graduate degrees and Missouri public four-year institutions of higher education which do offer graduate degrees for the purpose of offering graduate degree programs on campuses of those public four-year institutions of higher education which do not otherwise offer graduate degrees. Such agreements shall identify the obligations and duties of the parties, including assignment of administrative responsibility. Any diploma awarded for graduate degrees under such a cooperative agreement shall include the names of both institutions inscribed thereon. Any cooperative agreement in place as of August 28, 2003, shall require no further approval from the coordinating board for higher education. Any costs incurred with respect to the administrative provisions of this subdivision may be paid from state funds allocated to the institution assigned the administrative authority for the program. The provisions of this subdivision shall not be construed to invalidate the provisions of subdivision (1) of this subsection;

(3) In consultation with the heads of the institutions of higher education affected and against a background of carefully collected data on enrollment, physical facilities, manpower needs, institutional missions, the coordinating board for higher education shall establish guidelines for appropriation requests by those institutions of higher education; however, other provisions of the Reorganization Act of 1974 notwithstanding, all funds shall be appropriated by the general assembly to the governing board of each public four-year institution of higher education which shall prepare expenditure budgets for the institution;

(4) No new state-supported senior colleges or residence centers shall be established except as provided by law and with approval of the coordinating board for higher education;

(5) The coordinating board for higher education shall establish admission guidelines consistent with institutional missions;

(6) The coordinating board for higher education shall require all public two-year and four-

year higher education institutions to replicate best practices in remediation identified by the coordinating board and institutions from research undertaken by regional educational laboratories, higher education research organizations, and similar organizations with expertise in the subject, and identify and reduce methods that have been found to be ineffective in preparing or retaining students or that delay students from enrollment in college-level courses;

(7) The coordinating board shall establish policies and procedures for institutional decisions relating to the residence status of students;

~~(7)~~ (8) The coordinating board shall establish guidelines to promote and facilitate the transfer of students between institutions of higher education within the state and [shall ensure that as of the 2008-09 academic year, in order to receive increases in state appropriations, all approved public two- and four-year public institutions shall work with the commissioner of higher education to establish agreed-upon competencies for all entry-level collegiate courses in English, mathematics, foreign language, sciences, and social sciences associated with an institution's general education core and that], **with the assistance of the committee on transfer and articulation, shall require all public two-year and four-year higher education institutions to create by July 1, 2014, a statewide core transfer library of at least twenty-five lower division courses across all institutions that are transferable among all public higher education institutions.** The coordinating board shall establish policies and procedures to ensure such courses are accepted in transfer among public institutions and treated as equivalent to similar courses at the receiving institutions. **The coordinating board shall develop a policy to foster reverse transfer for any student who has accumulated enough hours in combination with at least one public higher education institution in Missouri that offers an associate degree and one public four-year higher education institution in the prescribed courses sufficient to meet the public higher education institution's requirements to be awarded an associate degree.** The department of elementary and secondary education shall [align such competencies with] **maintain the alignment of the assessments found in section 160.518 and successor assessments with the competencies previously established under this subdivision for entry-level collegiate courses in English, mathematics, foreign language, sciences, and social sciences associated with an institution's general education core;**

~~(8)~~ (9) The coordinating board shall collect the necessary information and develop comparable data for all institutions of higher education in the state. The coordinating board shall use this information to delineate the areas of competence of each of these institutions and for any other purposes deemed appropriate by the coordinating board;

~~(9)~~ (10) Compliance with requests from the coordinating board for institutional information and the other powers, duties and responsibilities, herein assigned to the coordinating board, shall be a prerequisite to the receipt of any funds which the coordinating board is responsible for administering;

~~(10)~~ (11) If any institution of higher education in this state, public or private, willfully fails or refuses to follow any lawful guideline, policy or procedure established or prescribed by the coordinating

MRT Policy

Coordinating Board for Higher Education Policy on Reverse Transfer

A. Introduction

Statutory Authority

RSMo 173.005 (8) directs the Coordinating Board for Higher Education to “develop a policy to foster reverse transfer for any student who has accumulated enough hours in combination with at least one public higher education institution in Missouri that offers an associate degree and one public four-year higher education institution in the prescribed courses sufficient to meet the public higher education institution’s requirements to be awarded an associate degree.”

Purpose of policy

Students regularly transfer credit hours from two-year to four-year institutions of higher education. Many students complete an associate degree before transferring to a four-year institution, and many do not earn an associate degree but complete a baccalaureate degree. Some students, however, do not complete either the associate or baccalaureate degree, despite earning a significant number of college credits. These students are often left without a postsecondary credential, despite having earned enough credits to be eligible for an associate degree.

Missouri Reverse Transfer (MRT) seeks to identify these students and, provided they have met the degree requirements, award them their first associate degree that reflects the academic work they have earned. This policy identifies the general aspects of the program and lays the fundamental foundation for implementation.

Reverse transfer in Missouri has traditionally existed as one-to-one agreement between a two-year and a four-year institution. However, by including all public universities and providing them with direction and support in the way of guidelines, policies and technologically enhanced pathways, Missouri has a chance to significantly enhance the current reverse transfer process for institutions and students alike.

Missouri recognizes this need for broader cooperation among all public two-year and four-year institutions regarding reverse transfers. The purpose of this policy, then, is to promote the development of an integrated statewide reverse transfer system whereby public four-year institutions and participating independent institutions may transfer student credits back to any public two-year institution. This policy will ensure that those students who have earned sufficient credits and are eligible for an associate degree be awarded that degree, in turn helping Missouri reach its goal of increasing the number of its citizens with higher education degrees.

Policy Objectives

1. Increase degree attainment for students in the state of Missouri.
2. Ensure that all eligible students have the opportunity to be awarded a first associate degree that reflects their educational efforts and allows them to compete more successfully in other academic arenas and the workforce.
3. Create a streamlined, technologically enhanced process that will assist four-year and two-year institutions in transferring student credits more efficiently, securely, and successfully.

B. Definitions

Degree granting institution (DGI)

Refers to the two-year institution that will award the associate degree to reverse transfer students. The DGI will count reverse transfer students in its yearly graduation report.

Host institution

Refers to the institution transferring credits back to the degree granting institution. The host institution may be either a four-year or two-year institution.

MRT eligible student

Refers to a student who has earned 15 or more college-level, degree-eligible, transferable credits from a two-year institution. Upon entry into MRT, the student is degree-seeking for the appropriate associate's degree.

C. Policy Guidelines

Residency Requirement

- Per Higher Learning Commission (HLC) guidance, a minimum of 15 credit hours is required at an institution for the awarding of an associate's degree. There is no requirement for the credit hours to occur at any particular point within the accumulation of the credit hours. In alignment with this guidance, 15 credit hours from a single institution is established as the minimum residency for the MRT.

Participating Institutions

- Pursuant to HB 1042, all Missouri public higher education institutions are required to participate as full members in Missouri Reverse Transfer (MRT).
- Independent institutions will be invited to participate in MRT, and a separate MOU will be established between MDHE and said independent institution to formalize their participation in MRT.
- Any independent institution that terminates their participation in the MRTA will continue to honor the agreement for their students with active agreements.
- The submission of necessary student-level data, for reporting and accountability, is a condition of participation in the MRT program. At a minimum, this includes data on eligible students, participating students, and completing students in order to assess effectiveness of the program.

Degree-Granting Institutions (DGI)

- The Degree-Granting Institution shall be the two-year institution with the greatest number of transferable credit to the four-year institution. An institution can award reverse transfer degrees only if the student has earned a minimum of 15 credit hours at that institution.
- If two or more institutions have the same number of transferable credit to the four-year institution, the most recently attended institution is identified as the DGI. If multiple options still exist at this point, the student will be asked for their DGI preference.

- Students may select any institution at which they have completed a minimum of 15 credit hours as their DGI. If different from the MRT selection hierarchy identified above, the notification of this selection is initiated by, and is the sole responsibility of, the student.
- The acceptance of transfer credit will be determined solely by the DGI.

Degrees Awarded

- The MRT will apply to associate degrees as identified by the DGI.
- Each DGI will identify at least one associate degree offered as part of MRT.
- There will be nothing to differentiate the MRT awarded degree from any other degree awarded by the institution on the student's diploma or transcript.

Student Eligibility

- Students are not eligible for MRT if they currently possess an associate degree or higher.
- Under certain circumstances, a student may be awarded simultaneously an associate degree through MRT and a baccalaureate degree.
- Students should contact the DGI regarding their eligibility for other degrees.

Reverse Transfer Process

- Potential students will be identified and their transcripts will be distributed as necessary, based on initial minimum transferrable credit hours completed (e.g., 60 credit hours) and at established intervals after the initial submission (e.g., annually).
- Transcripts submitted from the four-year to the two-year institution for the purposes of conducting a degree audit to determine student eligibility can be official or unofficial if sent directly from institution to institution. Electronic submissions are the standard method of exchange.
- The acceptance of transfer credit will be determined by the DGI.
- Release of transcripts will be in accordance with the host institution's policies.
- The requirements for degree completion will be determined by the DGI and will be identified to the MRT student.
- There will be no time limit on students completing the associate degree through the MRT. Students will remain in the program as long as they are continuously enrolled at the host institution.
- The course requirements for degree completion will be determined by the DGI and will be identified to the MRT student. DGI's are encouraged to substitute any institution-unique course requirements.
- Institutions will identify inactive students, those who have completed 15 hours with a single institution but never completed a degree, via an automated search and introduce those students to MRT.
- When the degree is awarded by the DGI, the DGI will send an official transcript noting conferment to the four-year host institution.

Impact on current reverse transfer agreements

- Once implemented, the MRT supersedes all existing reverse transfer agreements. Those students currently involved in a reverse transfer agreement will be allowed to continue in

said agreement. The student will also be allowed to transition to the new MRT, thereby selecting the less restrictive agreement.

Student Responsibility

- In an effort to remain FERPA compliant, all students wishing to participate in MRT are required to “opt-in” to the program. By doing so, the student agrees to the exchange of transcript information between the two institutions and is automatically declared for degree candidacy.
- If a student self-identifies to be removed from the program or graduates from the institution, this will result in an automatic “opting-out” of MRT by that student. If MRT decisions are not acceptable to the MRT student, that student is then allowed to appeal said decisions by contacting the articulation and transfer officer at the DGI.

Four-year Institution Responsibility

- To identify the student eligible for MRT and inform the DGI of the student’s desire to participate in the program.
- Will not charge the student a transcript fee as part of MRT
- Submission of all necessary transcripts to the DGI.
- “Opt-out” student monitoring and reporting.

Two-year Institution Responsibility

- The DGI is responsible for reviewing the eligible MRT student’s records and in awarding the degree.
- Will not charge the student a graduation or transcript fee as part of MRT.
- They are required to submit a final transcript noting conferment to the four-year host institution.
- Closing the MRT student out of the program.
- Providing any notifications and/or updates to the MRT student.

Review of the Missouri Reverse Transfer Agreement

- The Missouri Reverse Transfer Agreement between public two-year and four-year institutions and participating independent institutions will be reviewed every two years in a manner to be determined by the commissioner of higher education.

Reporting and Accountability

- The submission of data for both reporting and accountability purposes is necessary for the success of this policy. All participating institutions agree to submit data on eligible students, participating students, completing students, and other data necessary to assess the effectiveness of MRT. For independent institutions, the specifics of the data required will be included in the participation MOU.

Glossary of Terms
&
FAQs (RTCs)

Glossary of Terms

CAO	Chief Academic Officer
DGI	Degree-Granting Institution
DV	Degree Verify
EMSAS	Enhanced Missouri Student Achievement Study
ETX	Embedded Transcript eXchange
FERPA	Family Educational Rights and Privacy Act
HLC	Higher Learning Commission
HOST	Home four-year institution of Reverse Transfer Student
IR	Institutional Research
MDHE	Missouri Department of Higher Education
MRT	Missouri Reverse Transfer
NSC	National Student Clearinghouse
OPEID	Office of Postsecondary Education Identification Number
PDF	Portable Document Format
RT	Reverse Transfer
RTC	Reverse Transfer Coordinator
RTS	Reverse Transfer Student

Missouri Reverse Transfer FAQs

Q: What is reverse transfer?

A: Reverse transfer is the process of allowing college students or former college students who have completed credits for an associate's degree to receive that degree even if they have transferred to a different college or university, or stopped out of higher education altogether.

Q: Who is eligible for reverse transfer?

A: A student must have earned a minimum of 15 credit hours at a single Missouri two-year institution to be eligible for a reverse transfer degree. Students are not eligible for the program if they currently possess an associate degree or higher.

Q: How will participating in Reverse Transfer benefit me as a student pursuing a bachelor's degree?

A: Earn your Associates Degree while pursuing your bachelor's degree
Possible Career Advancement with earned associate degrees
Qualify for more and/or better jobs
A degree can help you earn more money
Possibly meet general education requirements at your 4 year transfer institution

Q: What institutions may participate in MRT?

A: All Missouri public higher education institutions are required by statute to participate in the Missouri Reverse Transfer Agreement. Independent institutions are invited to participate in the MRTA. A separate MOU will be established between MDHE and the independent institution to formalize their participation. Any independent institution that terminates its participation in the MRTA will continue to honor the agreement for their students with active agreements. Additionally, the submission of necessary student data is a condition of participation in the MRTA.

Q: What degrees can be obtained through MRT?

A: An associate degree as identified by the degree-granting institution may be obtained through MRT.

Q: Do I have to take any classes back at the community college if I opt in into this program?

A: No, one of the benefits of this program for the participating student is that the courses completed at the four year institution will be used to satisfy those additional requirements

Q: Is an associate's degree obtained through MRT different from any other associate's degree?

A: No.

Q: Can I attend the Community College graduation once my degree is completed?

A: Absolutely. Once the student is notified that all degree requirements are met, the student may make any inquiries regarding participating in upcoming commencement ceremonies.

Q: How do students participate in MRT?

A: All students wishing to participate in MRT are required to “opt in” to the program. By doing so, the student agrees to the exchange of transcript information between the two institutions and is automatically declared for degree candidacy.

Q: I have transcripts from other institutions that are not on file at my community college. When do I need to send these to them for review?

A.: It is the student's responsibility to arrange to have those transcripts sent to the community college as soon as the opt-in process is completed.

Q: Will participating in reverse transfer affect student financial aid (FA) at the four year school? Will transferring back courses create any FA problems for the student with the community college partner?

A: Your financial aid will not be affected by your participation in the MRT process at either the Host or DGI.

Q: Can students opt out of MRT?

A: If a student graduates from the host institution, is no longer active there or self-identifies to be removed from the program, they are automatically “opting out” of the MRT. Opting out of the MRT program does not affect your status as a student at the Host institution. It may however affect credit transfer that has already taken place under the MRT program agreement.

Q: Do students have an appeal process if they are not satisfied with MRT?

A: If MRT decisions are made that are not acceptable to the student, he or she is allowed to appeal by contacting the articulation and transfer officer at the degree-granting institution (refers to the two-year institution with the greatest number of transferable credits to the four-year institution).

Q: Is there a time limit for students to complete their degree requirements in the Missouri Reverse Transfer program?

A: There is no time limit on students completing the associate degree through MRT. Students will remain in the program as long as they are continuously enrolled at the host institution.

Q: What is the “degree-granting institution”?

A: The institution that will award the reverse transfer student their associate degree and will count the student in its yearly graduation report is the degree-granting institution. If two or more institutions have the same number of transferable credits to the four-year institution, the most recently attended institution shall be the DGI. If multiple options still exist at this point, the student will be asked for their DGI preference.

Q: What is the “host institution”?

A: The host institution is the institution which transfers credits back to the degree granting institution. The host institution may be either a four-year or a two-year institution.

Q: What is the responsibility of the host institution?

A: The host institution must identify the student eligible for MRT and inform the DGI of the student’s desire to participate in the program. The host institution agrees to submit all necessary transcripts to the degree-granting institution without charge to the student. The host institution must also monitor and report on the students who opt out of MRT.

Q: What is the responsibility of the degree-granting institution?

A: The degree-granting institution is responsible for reviewing the eligible MRT student’s records and awarding the degree. They are required to submit a final transcript noting conferment to the four-year host institution at no charge to the student. The degree-granting institution is responsible for closing the student out of the MRT program, and providing any notifications and/or updates to the MRT student.

Q: What is the responsibility of the student in the Reverse Transfer Process?

A: Participating students are responsible for the following actions: 1) Reverse Transfer Student (RTS) applies and is admitted to HOST institution; 2) RTS responds to MRT invitation from RTC; 3) RTS completes Opt-In form; 4) RTS requests all official transcripts of previous coursework completed at institutions other than the HOST institution to be sent to DGI; 5) RTS must complete DGI degree requirements; 6) RTS replies to DGI notification that requirements are met and 7) RTS must initiate Opt-out process.

Q: What is the reverse transfer process?

A: All institutions will use an automated search to identify inactive students who have completed 15 hours with a single institution but never completed a degree. They will contact those students and introduce them to the Missouri Reverse Transfer program. The transcripts of students who opt to participate in MRT will be sent electronically by the host institution to the degree-granting institution. Transcripts will be sent at established intervals after the initial submission (e.g., annually). The release of transcripts will be in accordance with the host institution’s policies, and the acceptance of transfer credit will be determined by the degree-granting institution. The degree-granting institution will determine the requirements for degree completion and inform the student. Degree-granting institutions are encouraged to substitute any institution-unique course requirements, especially those that require a student to be physically present on campus. When the degree is awarded by the degree-granting institution, it will send an official transcript noting conferment to the four-year host institution.

MDHE Activities

Purpose

The purpose of this document is to outline the tasks necessary to implement Reverse Transfer (RT) in the context of the Missouri Reverse Transfer Initiative. As pilot institutions perform these tasks, they are asked to document what worked well, identify what needs improvement, note items that might be removed, and describe any additional tasks that should be included for the general scale-up across the state.

Keep in mind these are very general activities that will most likely have numerous sub-tasks. The intent is to provide enough guidance to accomplish the goal without being overly prescriptive as to the actual process.

Note: 2 Designates an activity to be completed by a two-year institution and 4 identifies an activity to be completed by a four-year institution.

MDHE Activities

- I. Confirm pilot institution participation
- II. Identify Reverse Transfer Coordinator for MDHE (MDHE RTC)
- III. Request institutions appoint Reverse Transfer Coordinators (RTC).
- IV. Develop student-oriented RT web site.
- V. Develop institutional resource RT web site.
- VI. Set up distribution list for institutional RTCs.

M - I. Confirm pilot institution participation

A. Description of what needs to be done:

Confirm pilot institution participation.

B. Rationale:

In order to successfully scale up a statewide RT implementation in 2014, a pilot program with partner institutions in 2013 is necessary to discover what works well, what doesn't, and what areas need improvement.

C. Activity is required or optional:

Prior to pilot program implementation, it is required that the Missouri Department of Higher Education (MDHE) confirm with pilot institutions that they will be participating for the duration of the pilot period.

D. Activity is one-time or recurring:

Confirmation of participation is a one-time activity.

E. Who needs to perform this activity:

MDHE will submit a request for confirmation. The Chief Academic Officers (CAOs) at each 2-year and 4-year pilot institution will be responsible for confirming the participation of their institution with MDHE.

F. Suggestions for accomplishing this activity:

MDHE may submit the request for confirmation by email or letter. The CAOs may respond to MDHE's request by email, letter, phone, or fax with this information.

G. Resources and reference materials:

NA

H. Date completed (one-time activity):

This activity was completed August, 2013.

M - II. Identify Reverse Transfer Coordinator for MDHE (MDHE RTC)

A. Description of what needs to be done:

Identify Reverse Transfer Coordinator for MDHE (MDHE RTC).

B. Rationale:

In order for the reverse transfer process to run smoothly with clear and consistent communication between participating institutions and MDHE, it is required that a Reverse Transfer Coordinator (RTC) be identified for MDHE.

C. Activity is required or optional:

Required

D. Activity is one-time or recurring:

This may be a recurring activity as changes in personnel at MDHE over the course of time will necessitate reassignment.

E. Who needs to perform this activity:

The assignment of this position will be made by the Assistant Commissioner of Academic Affairs for MDHE using the RTC job description provided.

F. Suggestions for accomplishing this activity:

The process for identifying personnel for this assignment will be at the discretion of the Assistant Commissioner.

G. Resources and reference materials:

NA

H. Date completed (one-time activity):

NA

M - III. Request institutions appoint Reverse Transfer Coordinators (RTCs)

A. Description of what needs to be done:

Request institutions appoint Reverse Transfer Coordinators.

B. Rationale:

In order for the reverse transfer process to run smoothly with clear and consistent communication between themselves as participating pilot institutions and with MDHE, it is required by MDHE that a Reverse Transfer Coordinator (RTC) be appointed at each pilot institution.

C. Activity is required or optional:

Required

D. Activity is one-time or recurring:

This appointment at each pilot institution is a one-time activity unless a change in personnel necessitates a new appointment during this pilot period.

E. Who needs to perform this activity:

The appointment of this position will be made by the Chief Academic Officer (CAO) at each pilot institution as requested in the memo from MDHE (Appendix A) in accordance with the RTC job description (Appendix B).

F. Suggestions for accomplishing this activity:

The process for appointing personnel for this assignment will be at the discretion of the institution's CAO.

G. Resources and reference materials:

Appendix A - Memo-MDHE

Appendix B - RTC job description

H. Date completed (one-time activity):

Contact information for the appointee must be sent by email to Crystal.Kroner@dhe.gov by September 15, 2013.

M - IV. Develop student-oriented RT website

A. Description of what needs to be done:

Develop student-oriented RT website.

B. Rationale:

As MO Reverse Transfer is a mandated program statewide, it is imperative that there be one central website that students across the state can access to begin their search for information on Reverse Transfer.

C. Activity is required or optional:

MDHE is required to create such a webpage that can be easily accessed by prospective students across the state.

D. Activity is one-time or recurring:

The initial “go live” for the webpage is a one-time activity. The webpage is to be constantly refreshed and updated on a necessary recurring basis.

E. Who needs to perform this activity:

The webpage creation and its maintenance will be assigned to the appropriate MDHE staff by the Assistant Commissioner of Academic Affairs.

F. Suggestions for accomplishing this activity:

NA

G. Resources and reference materials:

The Reverse Transfer webpage can be accessed at <http://www.dhe.mo.gov/>.

H. Date completed (one-time activity):

The initial webpage should go live by ????

M - V. Develop institutional resource RT website

A. Description of what needs to be done:

Develop institutional resource RT website.

B. Rationale:

As MO Reverse Transfer is a mandated program statewide, it is imperative that there be one central website that institutions across the state can access as a comprehensive resource to begin their search for information on Reverse Transfer.

C. Activity is required or optional:

MDHE is required to create such a webpage that can be easily accessed by institutions across the state.

D. Activity is one-time or recurring:

The initial “go live” for the webpage is a one-time activity. The webpage is to be constantly refreshed and updated on a necessary recurring basis. Participating institutions will be notified on a timely basis regarding changes to the webpage.

E. Who needs to perform this activity:

The webpage creation and maintenance will be assigned to the appropriate MDHE staff by the Assistant Commissioner of Academic Affairs.

F. Suggestions for accomplishing this activity:

NA

G. Resources and reference materials:

The Reverse Transfer webpage can be accessed at <http://www.dhe.mo.gov/>.

H. Date completed (one-time activity):

The initial webpage should go live by ????

M - VI. Set up distribution list for institutional RTCs

A. Description of what needs to be done:

Set up distribution list for institutional RTCs.

B. Rationale:

In order for the reverse transfer process to run smoothly with clear and consistent communication between participating pilot institutions and MDHE, it is required that MDHE set up a distribution list for the RTCs at participating institutions. This information is required to become part of the MDHE RT webpage for both prospective students and participating institutions.

C. Activity is required or optional:

Required

D. Activity is one-time or recurring:

The set-up is a one-time activity with updates and revisions completed as necessary.

E. Who needs to perform this activity:

The institutional distribution list will be set up and maintained by the MDHE RTC.

F. Suggestions for accomplishing this activity:

The process to create the list will be at the sole discretion of the MDHE RTC.

G. Resources and reference materials:

This institution list will be available at <http://www.dhe.mo.gov/>.

H. Date completed (one-time activity):

The initial distribution list for pilot institution RTCs will be completed and available by September 20, 2013.

Institutional Activities

Purpose

The purpose of this document is to outline the tasks necessary to implement Reverse Transfer (RT) in the context of the Missouri Reverse Transfer Initiative. As pilot institutions perform these tasks, they are asked to document what worked well, identify what needs improvement, note items that might be removed, and describe any additional tasks that should be included for the general scale-up across the state.

Keep in mind these are very general activities that will most likely have numerous sub-tasks. The intent is to provide enough guidance to accomplish the goal without being overly prescriptive as to the actual process.

Note: 2 Designates an activity to be completed by a two-year institution and 4 identifies an activity to be completed by a four-year institution.

Institutional Activities

- I. Register with the National Student Clearinghouse for Electronic Transcript Exchange.
- II. Identify RTC and notify MDHE RTC – 2 & 4.
- III. Identify AA degrees and notify MDHE RTC – 2.
- IV. Develop advising strategy for Reverse Transfer Student (RTS) – 2.
- V. Address issue of course substitutions – 2.
- VI. Define and set up institutional method of tracking RTS – 2 & 4.
- VII. Modify student records system to produce transcript in PDF format – 2 & 4.
- VIII. Examine current transcript receipt process and modify to accommodate PDF transcripts – 2 & 4.
- IX. Test transmission and receipt with one or more partners – 2 & 4.
- X. RTC identifies office or individual responsible for identifying eligible RTS – 4.
- XI. RTC defines institutional policy for frequency of contacting eligible RTS – 4.

- XII. RTC develops opt-in/graduation application and obtains approval from appropriate institutional authorities – 4.
- XIII. RTC develops campus/student communication plan – 2 & 4.
- XIV. RTC defines process for contacting RTS – 2 & 4.
- XV. Develop campus webpages explaining Reverse Transfer – 2 & 4.
- XVI. Define timeline for extracting RTS – 2 & 4.
- XVII. Extract eligible RTS and send to RTC – 4.
- XVIII. Check extracted eligible RTS for prior disqualifying degree – 4.
- XIX. RTC contacts eligible RTS students – 4.
- XX. RTC explains program to eligible RTS – 4.
- XXI. Interested students complete opt-in/graduation applications – 4.
- XXII. RTC adds institutional tracking element(s) to student record – 4.
- XXIII. RTC transmits completed opt-in/graduation application to 2 year school – 4.
- XXIV. Add institutional tracking element(s) to student record – 2.
- XXV. RTC acknowledges receipt of opt-in to student – 2 & 4.
- XXVI. Optional - run degree audit – 2.
- XXVII. Optional - contact student with needed course information – 2.
- XXVIII. RTC sends transcript at intervals determined in conjunct with partner institutions – 4.
- XXIX. RTC runs degree audit using new course work – 2.
- XXX. RTC repeats process until student completes degree – 2.
- XXXI. RTC notifies student when degree requirements are met – 2.

- XXXII. Award degree – 2.
- XXXIII. Notify 4-year institution degree has been awarded – 2.
- XXXIV. Change student status to completed reverse transfer – 2 & 4.
- XXXV. Report as necessary – 2 & 4.

**I - I. Register with the National Student Clearinghouse for
Electronic Transcript Exchange - 2 & 4**

A. Description of what needs to be done:

Register with the National Student Clearinghouse (NSC) for Electronic Transcript Exchange.

B. Rationale:

For institutions to be able to participate in the reverse transfer initiative and securely and efficiently exchange transcript information on reverse transfer students, they are required to be registered through the NSC.

C. Activity is required or optional:

Required

D. Activity is one-time or recurring:

One-time

E. Who needs to perform this activity:

Registrars at participating institutions

F. Suggestions for accomplishing this activity:

Set up a mailbox to receive PDF transcripts specifically for Reverse Transfer with the name *opeidmort*. As an example, UMSL would have an id of 00251900mort.

G. Resources and reference materials:

Appendix C - NSC agreement

H. Date completed (one-time activity):

September 15, 2013

I. Comments:

I - II. Identify RTC and notify MDHE RTC - 2 & 4

A. Description of what needs to be done:

Identify RTC and notify MDHE RTC.

B. Rationale:

C. Activity is required or optional:

Required

D. Activity is one-time or recurring:

One-time and updated as personnel changes at institutions dictate.

E. Who needs to perform this activity:

Varies by institution - could be CAO, Registrar, Dean of Enrollment, Transfer Admissions.

F. Suggestions for accomplishing this activity:

Use RTC job description provided as a guideline for personnel selection.

G. Resources and reference materials:

Appendix D - RTC job description

H. Date completed (one-time activity):

I. Comments:

I - III. Identify associate's degrees and notify MDHE RTC - 2

A. Description of what needs to be done:

Identify associate's degrees and notify MDHE RTC.

B. Rationale:

In order for students interested in reverse transfer to make an informed decision regarding institutions and associate's degrees, each participating 2-year institution must identify and publicize what degrees will be available for completion through the reverse transfer process.

C. Activity is required or optional:

Required

D. Activity is one-time or recurring:

Recurring

E. Who needs to perform this activity:

Vice President/Vice Chancellor for Academic Affairs

F. Suggestions for accomplishing this activity:

It will be at each Vice President/Vice Chancellor's discretion as to how associate's degrees at their institutions will be identified for reverse transfer and who will be part of that identification process.

G. Resources and reference materials:

Available degrees by institution are posted at <http://www.dhe.mo.gov/>.

H. Date completed (one-time activity):

I. Comments:

I–IV. Develop advising strategy for Reverse Transfer Student (RTS) - 2

A. Description of what needs to be done:

Develop advising strategy for RTS

B. Rationale:

The degree granting institution RTC must be prepared with a strategy to communicate effectively, efficiently and in a timely fashion with the RTS in regards to course requirements necessary to complete AA under MRT.

C. Activity is required or optional:

Required

D. Activity is one-time or recurring:

One-time

E. Who needs to perform this activity:

VP/VC for Academic Affairs

RTC

Advising Manager

F. Suggestions for accomplishing this activity:

It will be at each VP/VC's (or their designee) discretion as to how to develop an advising strategy to address the progress of the RTS towards AA degree completion.

G. Resources and reference materials:

Advising information for RTS should be posted on the campus Reverse Transfer website.

H. Date completed (one-time activity):

I. Comments:

I–V. Address issue of course substitutions - 2

A. Description of what needs to be done:

Address issue of course substitutions

B. Rationale:

To satisfy the law and the MRT policy, the participating degree granting institution must provide access to a minimum of one associate degree for the eligible RTS. To do so, the DGI will need to decide how their campus-specific course requirements will be met by reverse transfer work from the Host (4-year institution) where there is no equivalent. (Ex: Capstone, Cornerstone, College Orientation, etc.)

C. Activity is required or optional:

Required

D. Activity is one-time or recurring:

Both

E. Who needs to perform this activity:

Possibly VP/VC for Academic Affairs, Registrar, Degree credit evaluator, RTC

F. Suggestions for accomplishing this activity:

It will be at each VP/VC's (or their designees) discretion as to how to address the issues around course substitution that will enable the RTS to complete the degree.

G. Resources and reference materials:

H. Date completed (one-time activity to set protocol):

I. Comments:

I - VI. Define and set up institutional method of tracking RTS - 2 & 4

A. Description of what needs to be done:

Define and set up institutional method of tracking RTS.

B. Rationale:

Tracking reverse transfer activity is essential to the operation of an efficient process and to ensure that RT students can be easily identified as a student group. All tracking data will be necessary to inform institutions of their student progress and success/challenge and will be necessary for reporting to the MO General Assembly and to the Lumina Foundation.

C. Activity is required or optional:

Required

D. Activity is one-time or recurring:

One-time

E. Who needs to perform this activity:

2-year RTCs and 4-year RTCs

F. Requirements for accomplishing this activity:

Indicators are needed to record the following statuses and events:

OPEID of institution to receive RT transcript – 4;

OPEID of institution to send RT transcript – 2;

Eligible for Reverse Transfer – 4;

Responded to the contact – 4;

Chose to participate (opted-in) – 4;

Completed associate's degree – 2 & 4;

Opted out – 2 & 4;

Additional data elements may be added at their discretion to meet institutional needs.

G. Resources and reference materials:

H. Date completed (one-time activity):

I. Comments:

I - VII. Modify student records system to produce transcript in PDF format - 2 & 4

A. Description of what needs to be done:

Modify student records system to produce transcript in PDF format.

B. Rationale:

For successful transcript exchange between participating institutions.

C. Activity is required or optional:

Required

D. Activity is one-time or recurring:

One-time

E. Who needs to perform this activity:

Registrar, IT staff

F. Suggestions for accomplishing this activity:

G. Resources and reference materials:

H. Date completed (one-time activity):

I. Comments:

I - VIII. Examine current transcript receipt process and modify to accommodate PDF transcripts - 2 & 4

A. Description of what needs to be done:

Examine current transcript receipt process and modify to accommodate PDF transcripts.

B. Rationale:

For successful transcript exchange between partner institutions.

C. Activity is required or optional:

Required

D. Activity is one-time or recurring:

One-time

E. Who needs to perform this activity:

Registrar, IT staff

F. Suggestions for accomplishing this activity:

G. Resources and reference materials:

H. Date completed (one-time activity):

I. Comments:

I - IX. Test transmission and receipt with one or more partners - 2 & 4

A. Description of what needs to be done:

Test transmission and receipt with one or more partners.

B. Rationale:

To be sure process is successful with more than one institution.

C. Activity is required or optional:

Required testing with at least two partners.

D. Activity is one-time or recurring:

One-time; could recur as new participating partners join the initiative.

E. Who needs to perform this activity:

Registrar

F. Suggestions for accomplishing this activity:

G. Resources and reference materials:

H. Date completed (one-time activity):

I. Comments:

**I - X. RTC identifies the office or individual responsible for
identifying eligible RTS - 4**

A. Description of what needs to be done:

RTC identifies the office or individual responsible for identifying eligible RTS.

B. Rationale:

To reach the target group of eligible students, it is essential that the office with the most access to student groups be identified right away and that the RTC meet with them to establish the correct query parameters.

C. Activity is required or optional:

Required

D. Activity is one-time or recurring:

One-time

E. Who needs to perform this activity:

4-year RTC

F. Suggestions for accomplishing this activity:

Discover the institutional office that has the most comprehensive access to student databases and that can query for specific student groups. Institutional Research and Registrar units are most likely to be the unit of choice.

G. Resources and reference materials:

H. Date completed (one-time activity):

I. Comments:

I - XI. RTC defines institutional policy for frequency of contacting eligible RTS - 4

A. Description of what needs to be done:

RTC defines institutional policy for frequency of contacting eligible RTS.

B. Rationale:

To set structure for recurring activity.

C. Activity is required or optional:

Required

D. Activity is one-time or recurring:

One-time

E. Who needs to perform this activity:

4-year RTC

F. Suggestions for accomplishing this activity:

Once during the initial enrollment term

Each semester enrolled [This choice will have an impact on how data is reported via EMSAS.]

G. Resources and reference materials:

H. Date completed (one-time activity):

I. Comments:

I - XII. RTC develops opt-in/graduation application and obtains approval from appropriate institutional authorities - 4

A. Description of what needs to be done:

RTC develops opt-in/graduation application and obtains approval from appropriate institutional authorities.

B. Rationale:

Opt-in/graduation application is required to ensure student's full participation in this process and compliance with FERPA.

C. Activity is required or optional:

Required

D. Activity is one-time or recurring:

One-time

E. Who needs to perform this activity:

4-year RTC

F. Suggestions for accomplishing this activity:

Paper, electronic, download to print and return.

Can serve as DGI graduation application as well as release of information form.

Approvals

Legal office

Registration

CAO

G. Resources and reference materials:

See Appendix E - download, print, and return form

See Appendix F - electronic form

H. Date completed (one-time activity):

I. Comments:

I - XIII. RTC develops campus/student communication plan - 2 & 4

A. Description of what needs to be done:

RTC develops campus/student communication plan.

B. Rationale:

To inform the campus community and students about reverse transfer.

C. Activity is required or optional:

Required

D. Activity is one-time or recurring:

Recurring

E. Who needs to perform this activity:

2-year and 4-year RTCs

F. Suggestions for accomplishing this activity:

Social media

Print ads (college papers)

Website

Electronic brochure

FAQs

G. Resources and reference materials:

Appendix G - sample webpage

H. Date completed (one-time activity):

I. Comments:

I - XIV. RTC defines process for contacting RTS - 2 & 4

A. Description of what needs to be done:

RTC defines process for contacting RTS.

B. Rationale:

C. Activity is required or optional:

Required

D. Activity is one-time or recurring:

One-time

E. Who needs to perform this activity:

2-year and 4-year RTCs

F. Suggestions for accomplishing this activity:

Email/Electronic system

Email and follow up letter

Letter only

Phone calls

New field on admissions application for students to check

Social media (chatting, texting)

G. Resources and reference materials:

Appendix H - Electronic

Appendix I - Email/Letter

Appendix J - Letter

Appendix K - Letter/Email

Appendix L - Letter

H. Date completed (one-time activity):

I. Comments:

I – XV. Develop campus webpages explaining Reverse Transfer - 2 & 4

A. Description of what needs to be done:

Develop campus webpages explaining Reverse Transfer.

B. Rationale:

To promote and inform the campus community and potential students about the reverse transfer initiative.

C. Activity is required or optional:

Required

D. Activity is one-time or recurring:

One-time

E. Who needs to perform this activity:

2-year and 4-year RTCs

F. Suggestions for accomplishing this activity:

Identify a webmaster that creates the webpage for the campus ensuring that the design is compliant with other institutional web designs and requirements.

G. Resources and reference materials:

Appendix G - sample webpage

H. Date completed (one-time activity):

Pilot institutions – Fall 2013

I. Comments:

I - XVI. Define timeline for extracting RTS - 2 & 4

A. Description of what needs to be done:

Define timeline for extracting RTS.

B. Rationale:

To create structure for recurring activity.

C. Activity is required or optional:

Required

D. Activity is one-time or recurring:

One-time

E. Who needs to perform this activity:

2-year and 4-year RTCs with IR or Registrar

F. Suggestions for accomplishing this activity:

Upon application to 4-year institution

At the time of transfer to 4-year institution

At institutions' census date

At the end of the student's first semester when academic record is established at the 4-year institution

G. Resources and reference materials:

H. Date completed (one-time activity):

I. Comments:

I - XVII. Extract eligible RTS and send to RTC - 4

A. Description of what needs to be done:

Extract eligible RTS and send to RTC.

B. Rationale:

RTC can begin the RTS contact process.

C. Activity is required or optional:

Required

D. Activity is one-time or recurring:

Recurring

E. Who needs to perform this activity:

IR office or Registrar

F. Suggestions for accomplishing this activity:

Process to be followed as previously agreed upon with institution's RTC.

G. Resources and reference materials:

H. Date completed (one-time activity):

I. Comments:

I - XVIII. Check extracted eligible RTS for prior disqualifying degree - 4

A. Description of what needs to be done:

Process list of RTS through a prior attendance query with NSC.

B. Rationale:

Students may be admitted on a non-final transcript or may have a degree from another institution that may disqualify them from participating.

C. Activity is required or optional:

Optional, but strongly recommended.

D. Activity is one-time or recurring:

Recurring.

E. Who needs to perform this activity:

Organizational unit that has access to NSC Student Tracker.

F. Suggestions for accomplishing this activity:

Generate a prior attendance query for the selected students using the term start date as the search date. Exclude students with a prior degree at the associate level or higher.

G. Resources and reference materials:

Excel layout: http://www.studentclearinghouse.org/colleges/files/ST_ExcelInstructions.pdf

Flat file layout: http://www.studentclearinghouse.org/colleges/files/ST_FlatFileLayout.pdf

H. Date completed (one-time activity):

I. Comments:

Degrees awarded will be returned by NSC if the requestor participates in Degree Verify (DV) and the other institution attended participates in DV.

I - XIX. RTC contacts eligible RTS students - 4

A. Description of what needs to be done:

RTC contacts eligible RTS students.

B. Rationale:

To begin RTS process of engagement and call to action.

C. Activity is required or optional:

Required

D. Activity is one-time or recurring:

As frequency has previously been defined

E. Who needs to perform this activity:

4-year RTC

F. Suggestions for accomplishing this activity:

Once during the initial enrollment term

Each semester enrolled [This choice will have an impact on how data is reported via EMSAS.]

Methods: as defined previously in Step I-XIV.

G. Resources and reference materials:

H. Date completed (one-time activity):

I. Comments:

I - XX. RTC explains program to eligible RTS - 4

A. Description of what needs to be done:

RTC explains program to eligible RTS.

B. Rationale:

To ensure that the student is fully informed of the process and his/her responsibility to the process. The RTC is required to explain the process and to acquire the student's agreement to the release of information required to participate in the process.

C. Activity is required or optional:

Required

D. Activity is one-time or recurring:

Recurring

E. Who needs to perform this activity:

4-year RTC

F. Suggestions for accomplishing this activity:

Face-to-face meeting

Electronic communication

Phone

Website

G. Resources and reference materials:

H. Date completed (one-time activity):

I. Comments:

I - XXI. Interested students complete opt-in/graduation application - 4

A. Description of what needs to be done:

Interested students complete opt-in/graduation application.

B. Rationale:

To gain commitment from the student to participate in reverse transfer and to ensure compliance with FERPA.

C. Activity is required or optional:

Required

D. Activity is one-time or recurring:

One-time

E. Who needs to perform this activity:

Reverse Transfer Student (RTS)

F. Suggestions for accomplishing this activity:

Electronically

Hard copy

Website

Since ETX is content and format agnostic, it is possible to produce a spreadsheet or similar file and send via the "mort" ETX mailbox. Optimally, all institutions would agree on a standard set of data and format. Suggestion: develop such a standard once the opt-in data is set.

G. Resources and reference materials:

Appendix E - download form, print, and return

Appendix F - electronic form

H. Date completed (one-time activity):

I. Comments:

I - XXII. RTC adds institutional tracking element(s) to student record - 4

A. Description of what needs to be done:

RTC adds institutional tracking element(s) to student record.

B. Rationale:

Tracking reverse transfer activity is essential to the operation of an efficient process and to ensure that RT students can be easily identified as a student group. All tracking data will be necessary to inform institutions of their student progress and success/challenge and will be necessary for reporting to the MO General Assembly and to the Lumina Foundation.

C. Activity is required or optional:

Required

D. Activity is one-time or recurring:

Recurring

E. Who needs to perform this activity:

4-year RTC

F. Suggestions for accomplishing this activity:

See I-IV.

G. Resources and reference materials:

H. Date completed (one-time activity):

I. Comments:

I – XXIII. RTC transmits completed opt-in/graduation application to 2-year school - 4

A. Description of what needs to be done:

RTC transmits completed opt-in/graduation application to 2-year school RTC.

B. Rationale:

To continue the reverse transfer process shifting the focus and responsibility for the student's next steps to the correct 2-year partner institution as designated by the student, the 4-year institution is required to transmit this information to the 2-year institution's RTC.

C. Activity is required or optional:

Required

D. Activity is one-time or recurring:

One-time

E. Who needs to perform this activity:

4-year RTC

F. Suggestions for accomplishing this activity:

Electronically

Hard copy

(How often?)

As received

As a group

G. Resources and reference materials:

H. Date completed (one-time activity):

I. Comments:

I - XXIV. Add institutional tracking element(s) to student record - 2

A. Description of what needs to be done:

Add institutional tracking element(s) to student record.

B. Rationale:

Tracking reverse transfer activity is essential to the operation of an efficient process and to ensure that RT students can be easily identified as a student group. All tracking data will be necessary to inform institutions of their student progress and success/challenge and will be necessary for reporting to the MO General Assembly and to the Lumina Foundation.

C. Activity is required or optional:

Required

D. Activity is one-time or recurring:

Recurring

E. Who needs to perform this activity:

2-year RTC

F. Suggestions for accomplishing this activity:

See I-IV

G. Resources and reference materials:

H. Date completed (one-time activity):

I. Comments:

I - XXV. RTC acknowledges receipt of opt-in to student - 2 & 4

A. Description of what needs to be done:

RTC acknowledges receipt of opt-in to student.

B. Rationale:

Once a student has opted-in, to keep the RTS engaged in the reverse transfer process, it is essential that his/her commitment is acknowledged immediately by the 2-year and 4-year RTCs at the partner institutions.

C. Activity is required or optional:

Required

D. Activity is one-time or recurring:

One-time

E. Who needs to perform this activity:

2-year and 4-year RTCs

F. Suggestions for accomplishing this activity:

Email
Social media
Phone
Letter

G. Resources and reference materials:

H. Date completed (one-time activity):

I. Comments:

I - XXVI. Run degree audit - OPTIONAL - 2

A. Description of what needs to be done:

Run degree audit.

B. Rationale:

To provide information to the RTS as to what courses are required for completion of desired reverse transfer associate's degree.

C. Activity is required or optional:

Optional

D. Activity is one-time or recurring:

Recurring

E. Who needs to perform this activity:

2-year RTC

F. Suggestions for accomplishing this activity:

G. Resources and reference materials:

H. Date completed (one-time activity):

I. Comments:

I - XXVII. Contact student with needed course information - OPTIONAL - 2

A. Description of what needs to be done:

Contact student with needed course information.

B. Rationale:

C. Activity is required or optional:

Optional

D. Activity is one-time or recurring:

Recurring

E. Who needs to perform this activity:

2-year RTC

F. Suggestions for accomplishing this activity:

G. Resources and reference materials:

H. Date completed (one-time activity):

I. Comments:

**I - XXVIII. RTC sends transcript at intervals determined in conjunction
with partner institutions - 4**

A. Description of what needs to be done:

RTC sends transcript at intervals determined in conjunction with partner institutions.

B. Rationale:

To provide 2-year institutions with academic progress of RTS toward completion of desired associate's degree as indicated on opt-in/graduation application.

C. Activity is required or optional:

Required

D. Activity is one-time or recurring:

Recurring as agreed upon with partner 2-year institution.

E. Who needs to perform this activity:

4-year RTC

F. Suggestions for accomplishing this activity:

End of each term (quarter, semester, trimester, etc.)

End of academic year

At 60-hour mark (combined earned credits from all institutions)

G. Resources and reference materials:

H. Date completed (one-time activity):

I. Comments:

I - XXIX. RTC runs degree audit using new coursework - 2

A. Description of what needs to be done:

RTC runs degree audit using new coursework.

B. Rationale:

To provide information to RTS as to what courses are required for completion of desired reverse transfer associate's degree.

C. Activity is required or optional:

Required

D. Activity is one-time or recurring:

Recurring

E. Who needs to perform this activity:

2-year RTC

F. Suggestions for accomplishing this activity:

G. Resources and reference materials:

H. Date completed (one-time activity):

I. Comments:

I - XXX. RTC repeats process until student completes degree - 2

A. Description of what needs to be done:

RTC repeats process until student completes degree.

B. Rationale:

To move RTS to completion of desired associate's degree from 2-year institution.

C. Activity is required or optional:

Required

D. Activity is one-time or recurring:

Recurring

E. Who needs to perform this activity:

2-year RTC

F. Suggestions for accomplishing this activity:

G. Resources and reference materials:

H. Date completed (one-time activity):

I. Comments:

I - XXXI. RTC notifies student when degree requirements are met - 2

A. Description of what needs to be done:

RTC notifies student when degree requirements are met.

B. Rationale:

C. Activity is required or optional:

Required

D. Activity is one-time or recurring:

One-time

E. Who needs to perform this activity:

2-year RTC

F. Suggestions for accomplishing this activity:

Email

Letter

Phone

G. Resources and reference materials:

Samples needed

H. Date completed (one-time activity):

I. Comments:

I - XXXII. Award degree - 2

A. Description of what needs to be done:

Award degree.

B. Rationale:

C. Activity is required or optional:

Required

D. Activity is one-time or recurring:

One-time

E. Who needs to perform this activity:

Registrar, Vice President/Vice Chancellor of Academic Affairs, President of DGI - to be decided

F. Suggestions for accomplishing this activity:

By mail

In person

G. Resources and reference materials:

Samples needed

H. Date completed (one-time activity):

I. Comments:

I - XXXIII. Notify 4-year institution degree has been awarded - 2

A. Description of what needs to be done:

Notify 4-year institution degree has been awarded.

B. Rationale:

Award signals the closing of RTS activity at 2-year and 4-year partner institutions.

C. Activity is required or optional:

Required

D. Activity is one-time or recurring:

One-time

E. Who needs to perform this activity:

2-year RTC

F. Suggestions for accomplishing this activity:

Email

Phone

Fax

G. Resources and reference materials:

Samples needed

H. Date completed (one-time activity):

I. Comments:

I - XXXIV. Change student status to completed reverse transfer - 2 & 4

A. Description of what needs to be done:

Change student status to completed reverse transfer.

B. Rationale:

For tracking purposes and data collection.

C. Activity is required or optional:

Required

D. Activity is one-time or recurring:

One-time

E. Who needs to perform this activity:

2-year and 4-year RTCs

F. Suggestions for accomplishing this activity:

G. Resources and reference materials:

H. Date completed (one-time activity):

I. Comments:

I - XXXV. Report as necessary - 2 & 4

A. Description of what needs to be done:

Report as necessary

B. Rationale:

Reports are required as conditions of the MO General Assembly and the Lumina Grant.

C. Activity is required or optional:

Required

D. Activity is one-time or recurring:

Recurring

E. Who needs to perform this activity:

2-year and 4-year RTCs or designee

F. Suggestions for accomplishing this activity:

G. Resources and reference materials:

H. Date completed (one-time activity):

I. Comments:

Student Activities

Purpose

The purpose of this document is to outline the tasks necessary to implement Reverse Transfer (RT) in the context of the Missouri Reverse Transfer Initiative. As pilot institutions perform these tasks, they are asked to document what worked well, identify what needs improvement, note items that might be removed, and describe any additional tasks that should be included for the general scale-up across the state.

Keep in mind these are very general activities that will most likely have numerous sub-tasks. The intent is to provide enough guidance to accomplish the goal without being overly prescriptive as to the actual process.

Note: 2 Designates an activity to be completed by a two-year institution and 4 identifies an activity to be completed by a four-year institution.

Reverse Transfer Student (RTS) Activities

- I. RTS applies and is admitted to HOST – 4.
- II. RTS responds to MRT invitation from RTC – 4.
- III. RTS completes Opt-In form – 4.
- IV. RTS requests all official transcripts of previous coursework completed at institutions other than the HOST institution to be sent to DGI – 2.
- V. RTS must complete DGI degree requirements – 4.
- VI. RTS replies to DGI notification that requirements are met – 2.
- VII. RTS must initiate Opt-out process – 2 or 4.

S - I. RTS applies and is admitted to the 4-year institution - 4

A. Description of what needs to be done:

RTS applies and is admitted to the 4-year institution.

B. Rationale:

All students must apply and be admitted before they are considered eligible for reverse transfer status.

C. Activity is required or optional:

Required

D. Activity is one-time or recurring:

Recurring

E. Who needs to perform this activity:

RTS

F. Suggestions for accomplishing this activity:

Submit application online or in hard copy; provide all official transcripts from previously attended colleges; must meet admission standards.

G. Resources and reference materials:

H. Date completed (one-time activity):

I. Comments:

S - II. RTS responds to MRT invitation from RTC - 4

A. Description of what needs to be done:

RTS responds to MRT invitation from RTC.

B. Rationale:

A response to the call to action on the part of the RTS initiates the reverse transfer process.

C. Activity is required or optional:

Required

D. Activity is one-time or recurring:

Either

E. Who needs to perform this activity:

RTS

F. Suggestions for accomplishing this activity:

Use the method of response required as outlined in invitation.

G. Resources and reference materials:

Sample response

H. Date completed (one-time activity):

I. Comments:

S - III. RTS completes opt-in/graduation application - 4

A. Description of what needs to be done:

RTS completes opt-in/graduation application.

B. Rationale:

To participate in reverse transfer, the RTS must fully understand and engage in the process. The form indicates that commitment and the student signature also gives permission to release/exchange information in compliance with FERPA.

C. Activity is required or optional:

Required

D. Activity is one-time or recurring:

One-time

E. Who needs to perform this activity:

RTS

F. Suggestions for accomplishing this activity:

RTS will accomplish this step in compliance with the guidelines given by the 4-year institution.

G. Resources and reference materials:

H. Date completed (one-time activity):

I. Comments:

S - IV. RTS requests all official transcripts of previous coursework completed at institutions other than the current 4-year institution to be sent to the 2-year institution - 2

A. Description of what needs to be done:

RTS requests all official transcripts of previous coursework completed at institutions other than the current 4-year institution to be sent to the 2-year institution.

B. Rationale:

For the RTS to most expeditiously meet the associate's degree requirements at the 2-year institution, all transcripts must be provided to the 2-year institution for review.

C. Activity is required or optional:

Required

D. Activity is one-time or recurring:

Recurring

E. Who needs to perform this activity:

RTS

F. Suggestions for accomplishing this activity:

Request official transcripts through the appropriate channels to be sent directly to the 2-year institution.

G. Resources and reference materials:

H. Date completed (one-time activity):

I. Comments:

S - V. RTS completes the 2-year degree requirements - 2

A. Description of what needs to be done:

RTS completes the 2-year degree requirements.

B. Rationale:

In order to complete the reverse transfer process and to receive a diploma from the 2-year institution, the student must complete all degree requirements.

C. Activity is required or optional:

Required

D. Activity is one-time or recurring:

One-time

E. Who needs to perform this activity:

RTS

F. Suggestions for accomplishing this activity:

Follow reverse transfer guidelines provided by the 2-year institution.

G. Resources and reference materials:

H. Date completed (one-time activity):

I. Comments:

S - VI. RTS replies to 2-year notification that requirements are met - 2

A. Description of what needs to be done:

RTS replies to 2-year notification that requirements are met.

B. Rationale:

To receive the diploma/degree award from the 2-year institution, the RTS must respond to notification.

C. Activity is required or optional:

Optional

D. Activity is one-time or recurring:

One-time

E. Who needs to perform this activity:

RTS

F. Suggestions for accomplishing this activity:

RTS must follow instruction given by 2-year institution outlined in notification.

G. Resources and reference materials:

H. Date completed (one-time activity):

I. Comments:

S - VII. RTS must initiate opt-out process - 2 or 4

A. Description of what needs to be done:

RTS must initiate opt-out process.

B. Rationale:

For the RTS to withdraw from the program, the 2-year RTC or the 4-year RTC must be notified by the RTS.

C. Activity is required or optional:

Required

D. Activity is one-time or recurring:

One-time

E. Who needs to perform this activity:

RTS only

F. Suggestions for accomplishing this activity:

Email

Letter

In person

G. Resources and reference materials:

Sample

H. Date completed (one-time activity):

I. Comments:

Communication

IT Resources

Data Collection
&
Assessment

Data Collection and Assessment

The MDHE will report on trends regarding completion rates for associate degrees resulting from Missouri's scaling-up piloting efforts beginning in August 2012. Special attention will be given to collecting data on demographic information for early-transfer students who:

- Are eligible for reverse transfer;
- Opt-in/Opt-out;
- Complete the associate degree, aggregated by gender, age, race/ethnicity and socioeconomic status;
- Go on to complete a baccalaureate after receiving the transfer degree;
- Drop out/stop out;
- Student and employer perspectives on the potential benefits of awarding the associate degree.

The MDHE will collect and analyze data on the reverse transfer system annually, and will develop an appropriate instrument to assess the system's effectiveness. The MDHE's data and assessment will be reviewed every three years by COTA, which will recommend changes to the policy as appropriate.

Contact Resources

Missouri Reverse Transfer Participants

Institution	Chief Academic Officer	Email	Registrar	Email	Reverse Transfer Coordinator	Title	Email
Avila University	Sister Marie Jo Harris	Marie.Harris@avila.edu	Dana Shirley	dana.shirley@avila.edu	Dana Shirley	Registrar & Director	dana.shirley@avila.edu
Central Methodist	Dr. Rita Gulstad	rgulstad@centralmethodist.edu	Kay Winegard	rwinegd@centralmethodist.edu	Brianne Hagedick	Registrar	bhagedi@centralmethodist.edu
Columbia College	Dr. Terry Smith	tsmith@ccis.edu			Gary Cain	Director of Evaluations	gcain@ccis.edu
Crowder College	Dr. Glenn Coltharp	GlennColtharp@crowder.edu	Rhonda Helm	rhondahelm@crowder.edu			
East Central College	Ms. Jeanne McCann	mecannj@eastcentral.edu	Marcia Bailey	baileymc@eastcentral.edu	Sarah Scroggins	Assistant Registrar	scroggins@eastcentral.edu
Evangel	Dr. Glenn Bernet, Jr.	bernetg@evangel.edu	Cathy Williams	williams@evangel.edu			
Fontbonne University	Dr. Greg Taylor	gtaylor@fontbonne.edu	Mazie Moore	mmoore@fontbonne.edu	Seth Carruthers		scarruthers@fontbonne.edu
Harris-Stowe State University	Dr. Dwayne Smith	smithd@hssu.edu	Chauvette McElmar	McElmarC@hssu.edu	Chauvette McElmar-Green	Registrar	McElmarC@hssu.edu
Jefferson College	Dr. Mindy Selsor	mselesor@jeffco.edu	Kim Harvey	kharvey@jeffco.edu	Kim Harvey	Director of Admissions and Student Records	kharvey@jeffco.edu
Lincoln University	Dr. Ann Harris	harris@lincolnu.edu	Liz Morrow	morrowe@lincolnu.edu	Liz Morrow	Registrar	morrowe@lincolnu.edu
Lindenwood University	Dr. Jan Weitzel	jweitzel@lindenwood.edu	Christine Hanner	channer@lindenwood.edu	Dr. Marilyn Abbott	Associate Provost	mabbot@lindenwood.edu
Linn State Technical College	Ms. Vicki Schwinke	vicki.schwinke@linnstate.edu	Elaine Brandt	elaine.brandt@linnstate.edu	Elaine Brandt	Registrar	elaine.brandt@linnstate.edu
Marville University	Dr. Mary Ellen Finch	mfinch@marville.edu	Stephanie Elfrink	selfrink@marville.edu	Terrence Andrews		tandrews@marville.edu
Metropolitan Community College	Mr. Paul Long	paul.long@mccck.edu	Jen Saab	kathy.hale@mccck.edu	Jen Saab	Communications Coordinator	Jen.Saab@mccck.edu
Mineral Area College	Dr. Carolyn Creechus	kayc@mineralarea.edu	Julie Sheets	jsheets@mineralarea.edu	Pam Reeder	Registrar	preeder@mineralarea.edu
Missouri Baptist University	Arlen Dykstra	adykstra@mobaup.edu	Linda Christophe	chrisk@mobaup.edu			
Missouri Southern State University	Dr. Pat Lipira	lipira-p@msu.edu	Cheryl Dobson	dobson-c@msu.edu	Mariah Callari	Academic Records Specialist	callari-m@msu.edu
Missouri State University	Dr. Frank Einhellig	frankein@missouristate.edu	Rob Hornberger	robhornberger@missouristate.edu	Dixie Williams	Ass. Director of Admissions	dixiewilliams@missouristate.edu
Missouri State West Plains	Dennis Lancaster	Dennislancaster@missouristate.edu	Lu Adams	lhadams@missouristate.edu	Lu Adams	Registrar	lhadams@missouristate.edu
Missouri University of Science and Technology	Dr. Kent Wray	rschwartz@mst.edu	Deanne Jackson	deamej@mst.edu	Deb Schatz	Admissions	schatzd@mst.edu
Missouri Western State University	Dr. Jeanne Daffron	daffron@missouriwestern.edu	Susan Bracciano	braccian@missouriwestern.edu	Susan Bracciano	Registrar	braccian@missouriwestern.edu
Moberly Area Community College	Dr. Jeffrey Lashley	jeffl@macc.edu	Lynn Walker	lwnw@macc.edu	Amy See		amys@macc.edu
North Central Missouri College	Dr. James Gardner	jgardner@mail.ncmisouri.edu	Linda Brown	lbrown@mail.ncmisouri.edu	Linda Brown	Registrar	lbrown@mail.ncmisouri.edu
Northwest Missouri State University	Dr. Doug Dunham	Dunham@nwmissouri.edu	Teri Vogel	tvogel@nwmissouri.edu	Bev Schenkel	Dean of Enrollment Management	bev@nwmissouri.edu
Ozarks Technical Community College	Dr. Steven Bishop	bishops@otc.edu	Lacey Mattheis	mattheil@otc.edu	Loren Lundstrom	Registrar	lundstrl@otc.edu
Southeast Missouri State University	Dr. Gerald McDougall	gmcougall@semo.edu	Sandy Hinkle		Maria Bridgeman		mbridgeman@semo.edu
Southwest Baptist	Dr. William Brown	bbrown@SBUinv.edu	John Credille	jcredille@SBUinv.edu	John Credille	Registrar	jcredille@SBUinv.edu
St. Charles Community College	Dr. Chris Breitmeyer	cbreitmeyer@stchas.edu	Kathy Brockgreiten	kbrockgreiten@stchas.edu	Laura Davidson	Associate Dean of Enrollment Services	ldavidson@stchas.edu
St. Louis Community College	Dr. Donna Dare	ddare@stlcc.edu	Karla Gable	kgable4@stlcc.edu	Karla Gable	Sr. Manager Enrollment Processing Systems/Registrar	kgable4@stlcc.edu
St. Louis University	Dr. Ellen Harshman	harshman@slu.edu	Jay Haugen	Haugenip@slu.edu	Jay Haugen	Registrar	Haugenip@slu.edu
State Fair Community College	Dr. Brent Bates	bbates@sfcemo.edu	Jennifer Wilbanks	jwilbanks@sfcemo.edu	Jennifer Wilbanks		
Stephens College	Dr. Annette Digby	adigby@stephens.edu	Linda Sharp	lsharp@stephens.edu	Linda Sharp	Registrar	lsharp@stephens.edu
Three Rivers Community College	Dr. Wes Payne	wpayne@trcc.edu	Derrick Miller	dmiller@trcc.edu	Derrick Miller	Director of Student Services	dmiller@trcc.edu
Truman University	Dr. Joan Poor	provost@truman.edu	Margaret Herron	mherron@truman.edu	Kimberly Titus	Assistant Registrar	kitus@truman.edu
University of Central Missouri	Dr. Deborah Curtis	curtis@ucmo.edu	Teri Bowman	tbowman@ucmo.edu	Michael Olsen		molsen@ucmo.edu
University of Missouri-Columbia	Dr. Brian Foster	fosterb@missouri.edu	Brenda Selman	selmanb@missouri.edu	Kim Houston	Office of Admissions	houstonka@missouri.edu
University of Missouri-Kansas City	Dr. Gail Hackett	hackette@umkc.edu	Douglas Swink	swinkd@umkc.edu	Autumn Ayers	Student Services Coordinator	aversal@umkc.edu
University of Missouri-St. Louis	Dr. Glen Cope	copeg@umsl.edu	Linda Silman	linds@umsl.edu	Melissa Hattman	Director, Community College Relations	HattmanM@msx.umsl.edu
Webster University	Dr. Julian Schuster	julianschuster@webster.edu	Don Morris	morrisd@webster.edu	Kim Kleinman	Assistant Director, Undergraduate Advising	kleinman@webster.edu
Westminster College	Dr. Carolyn Perry	Carolyn.Perry@westminster-mo.edu	Kathy Neal	kathy.neal@westminster-mo.edu	Dr. David Jones	Associate Dean of Faculty	David.Jones@westminster-mo.edu
William Woods University	Ms. Sherry McCarthy	smccarth@williamwoods.edu	Tara Emerson	tara.emerson@williamwoods.edu	Tara Emerson	Registrar	tara.emerson@williamwoods.edu

Appendices



MEMORANDUM

TO: Chief Academic Officers, Four-Year Public Institutions
Chief Academic Officers, Two-Year Public Institutions
Chief Academic Officers, Independent Institutions

FROM: Rusty Monhollon, Assistant Commissioner of Academic Affairs, on behalf of the
Missouri Reverse Transfer IT / Operations Workgroup

RE: Reverse Transfer Technology Update

DATE: August 19, 2013

In preparation for implementing a statewide reverse transfer agreement, last year the MDHE began collecting baseline data on student information systems (SIS) being utilized by institutions and the level of readiness to perform electronic transcript exchange among participants. A primary objective was to have this exchange be as automated as possible. After intensive research into technology options, the IT Work Group recommended using the National Student Clearinghouse (NSC) as Missouri's transcript exchange service for reverse transfer. Initially transcripts will be exchanged in PDF format while institutions prepare for XML data exchange, the desired outcome. It is important to keep in mind that this applies only to Reverse Transfer transcript exchanges. It is possible this will not meet ALL the needs of every participating institution. This does not preclude schools from continuing to use in-place methods and vendors. To meet specific institutional needs, e.g., electronic transcripts from high schools, other transcript exchange options may be chosen.

With the policy finalized for CBHE approval this September, MRT is moving forward with its next steps in technology and implementation. MDHE will be contacting your institution's registrar with the specifics for registering with the National Student Clearinghouse Electronic Transcript Exchange (ETX) service. There is no cost for this service. In addition, it is important that you identify an institutional Reverse Transfer Coordinator to ensure the clear communication of guidelines and processes for scaling up (see job description attached to this message). This needs to be done no later than **September 15, 2013**. Please send contact information for your Reverse Transfer Coordinator to Crystal Kroner at Crystal.Kroner@dhe.mo.gov.

Beginning this fall, high volume two- and four-year partnering institutions (listed below) will pilot recommended strategies for implementing reverse transfer to provide feedback for scale up. In addition, applications for funding to assist institutions with reverse transfer technology development will be going out toward the end of October to all participating institutions that

have signed a Memorandum of Understanding with the MDHE regarding data collection for accountability to the Lumina Foundation and completed the institutional readiness assessment. MDHE staff will contact institutions that have not completed this assessment.

Reverse Transfer Pilot Partners

1. Missouri State University – Ozark Technical College
2. Northwest Missouri State University – Metropolitan Community College
3. University of Missouri – St. Louis – St. Louis Community College
4. University of Missouri – Columbia – Moberly Area Community College
5. Columbia College – Moberly Area Community College

MDHE Reverse Transfer Coordinator

Job Description for RTC

The role of the MDHE Reverse Transfer Coordinator (RTC) will be to coordinate the reverse transfer process under the Missouri Reverse Transfer policy and suggested implementation steps. This person will be the primary department liaison for all things related to Missouri Reverse Transfer between all RTC's at participating institutions. This includes MDHE, Reverse Transfer Steering Committee, colleagues at partner institutions, and colleagues within your institution.

It will be very important the RTC be familiar with the policy, process, and any information that is available regarding the Missouri Reverse Transfer.

The MDHE RTC will facilitate statewide support for postsecondary RTC's through an implementation handbook, and training.

Duties

- Facilitate communication and training on MRT implementation strategies, developments from piloting efforts, communication resources, and project goals between members of the steering committee, work groups, and RTC's representing all participating institutions.
- Maintain MDHE website as an informational hub linking all institutions with guidelines and FAQ's, as well as resources on webpage and brochure templates.

Reverse Transfer Coordinator

Job Description for RTC

The role of the Institutional Reverse Transfer Coordinator (RTC) will be to coordinate the reverse transfer process under the Missouri Reverse Transfer policy and suggested implementation steps. This person will be the primary contact for all things related to Missouri Reverse Transfer between all constituents. This includes MDHE, Reverse Transfer Steering Committee, colleagues at partner institutions, and colleagues within your institution, students, and community members.

It will be very important the RTC take the time to be familiar with the policy, process, and any information that is available regarding the Missouri Reverse Transfer.

Note: 2 Designates an activity to be completed by a two-year institution and 4 identifies an activity to be completed by a four-year institution.

The RTC will be supported through an implementation handbook, a RTC at MDHE, and training.

Duties

- Define and set up institutional method of tracking Reverse Transfer Students (RTS) – 2 & 4
- Identifies office or individual responsible for identifying eligible RTS – 4
- Defines institutional policy for frequency of contacting eligible RTS – 4
- Develops opt-in form and obtain approval from appropriate institutional authorities – 4
- Develops campus/student communication plan – 2 & 4
- Defines process for contacting RTS – 2 & 4
- Develop campus web pages explaining Reverse Transfer – 2 & 4
- Define timeline for extracting RTS – 4
- Extract eligible RTS and send to RTC – 4
- Contacts eligible RTS students – 4
- Explains program to eligible RTS – 4
- Adds institutional tracking element(s) to student record – 4
- Transmits completed opt-in form to 2 year school – 4
- Transmits student opt-out decision to partner institution – 2 & 4
- Change student status to completed Reverse Transfer – 2 & 4
- Report as necessary – 2 & 4

MIIL.B



Electronic Transcript Exchange Agreement for Collegiate Institutions

1. The National Student Clearinghouse, a not-for-profit corporation organized under the laws of Virginia ("Clearinghouse") and the undersigned Collegiate Institution ("Institution") agree to the terms and conditions set forth in this Electronic Transcript Exchange Agreement ("Agreement").
2. The Clearinghouse provides an Electronic Transcript Exchange ("ETX") system and service to facilitate the electronic exchange of transcript files between participating organizations. The system provides registration and verification of participants, protocols for securely sending and receiving files, logging of file transmissions, and electronic notification.
3. The Institution hereby appoints the Clearinghouse as its agent for purposes of electronic transcript transmissions in accordance with this Agreement and may use the Clearinghouse's ETX services to facilitate the sending and/or receiving of transcripts through electronic means with other postsecondary institutions who have formally agreed to participate in the ETX program. The Institution agrees to send and/or receive transcripts in an electronic format that is acceptable to the Clearinghouse and other ETX participants.
4. The Clearinghouse agrees to electronically notify the sending Institution that the electronic transcript has been received by the Clearinghouse, and electronically notify the receiving Institution when the electronic transcript has been placed in their mailbox, indicating how they can retrieve the document. The Clearinghouse does not store or maintain copies of the transcript in its database.
5. The Clearinghouse will not charge the Institution for services provided under this Agreement.
6. The Institution will institute and maintain reasonable controls to ensure that the transcript it provides to the Clearinghouse under this Agreement is accurate. The Institution agrees that the Clearinghouse will not be responsible for actions, errors or omissions of the Institution.

The Clearinghouse will institute and maintain reasonable controls to ensure the integrity and security of its data transmission systems so that it provides transcripts solely to authorized recipients in accordance with the terms of this Agreement and applicable law. The Clearinghouse agrees to indemnify and hold the Institution harmless from any direct loss, cost, damage or expense suffered by the Institution as a direct result of the Clearinghouse's failure to comply with its obligations under this Agreement. The Clearinghouse will maintain insurance covering errors and omissions in its data processing operations in the amount of at least two million dollars (\$2,000,000).

The parties agree to comply with all applicable laws and regulations governing the activities and services provided under this Agreement, including FERPA and other laws concerning the privacy and confidentiality of information and records.

7. The Clearinghouse will not retain or release personally identifiable information provided by the Institution except as specifically authorized under this Agreement. The Institution retains full ownership rights to the information in the transcript it provides to the Clearinghouse.
8. The Institution agrees to provide all notices under this Agreement to:

National Student Clearinghouse
2300 Dulles Station Boulevard, Suite 300
Herndon, VA 20171
Attn: Vickie Graham, Contract Administrator
Electronically: graham@studentclearinghouse.org
Fax: 703-742-4234

The Clearinghouse agrees to provide all notices under this Agreement to the signatory and address below unless otherwise instructed in writing by the Institution. The Clearinghouse considers the signatory to this Agreement as its primary contact for all operational and systems issues related to transcript orders unless otherwise instructed in writing by the Institution.

9. The parties agree that all rights and obligations under this Agreement shall be interpreted, governed and enforced under the laws of Virginia, without giving effect to its choice or conflicts of law provisions.
10. The effective date of this Agreement is the date by which it is signed by both parties. This Agreement remains in effect until terminated by either party by providing sixty (60) days written notice to the other party. The parties agree that any subsequent modifications to this Agreement will be made only in writing.
11. All representations, warranties, disclaimers of liabilities, indemnifications, and covenants between the parties will survive the termination of this Agreement for any reason and in any manner and will remain in full force and effect between the parties.

NATIONAL STUDENT CLEARINGHOUSE

	Institution
Signature	OPEID
Ricardo D. Torres	
Print Name	Signature Date
President	Print Name
Title	Title
Date	Street Address
www.studentclearinghouse.org	City/State/Zip
	Telephone
	Email

Your Service Implementation Contact

If we should contact someone else at your institution other than the contract signee to initiate your service, please provide his/her name and contact information below.

Name (please print or type)	Title
Telephone	Email



National Student Clearinghouse®
 2300 Dulles Station Boulevard, Suite 300
 Herndon, Virginia 20171

703-742-4200
 www.studentclearinghouse.org

ETX Profile Setup Form

School Name *(please print or type)* _____

School Code _____

File format for sending transcripts *(check one)*: EDI PDF XML Other: _____

Primary Contact

Name _____

Phone _____

Title _____

Email _____

Secure FTP Mailbox Setup: Indicate the departments that require separate secure FTP mailboxes for sending and/or receiving electronic transcripts.

Department Name	Allow to SEND transcripts? <i>(check one)</i>	Allow to RECEIVE transcripts? <i>(check one)</i>	RECEIVE file formats <i>(check all that apply)</i>	List of email addresses that should receive file notification emails <i>(attach separate sheet, if necessary)</i>
	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> EDI <input type="checkbox"/> PDF <input type="checkbox"/> XML <input type="checkbox"/> Other: _____	_____ _____ _____
	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> EDI <input type="checkbox"/> PDF <input type="checkbox"/> XML <input type="checkbox"/> Other: _____	_____ _____ _____
	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> EDI <input type="checkbox"/> PDF <input type="checkbox"/> XML <input type="checkbox"/> Other: _____	_____ _____ _____
	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> EDI <input type="checkbox"/> PDF <input type="checkbox"/> XML <input type="checkbox"/> Other: _____	_____ _____ _____

Fax form with Electronic Transcript Agreement to 703-742-4234

Missouri Reverse Transfer Opt-In/Graduation Application

In compliance with Missouri HB1042, Missouri colleges and universities are participating in the Missouri Reverse Transfer statewide initiative which may enable you to earn an associate degree.

Name: _____ Date of Birth: _____
(Please print your name as you wish it to appear on your diploma.)

Student ID# (4-year): _____ Last Four Digits of SS#: _____

Home Phone: _____ Cell Phone: _____

Mailing Address: _____
Street City State Zip Code

Primary Email: _____ Secondary Email: _____

Current 4-year institution attending: _____

Previous institution(s) attended: _____

Associate degree you are seeking: _____
(For a list of all 2-year degrees, visit [[add url](#)]).

By completing this application, I authorize _____ (current 4-year institution) to release my official transcript* to _____ (previous 2-year institution). I agree to allow _____ (previous 2-year institution) to review my academic records and post any degree for which I qualify. I understand that a final transcript* with my degree awarded will be provided to my current 4-year institution.

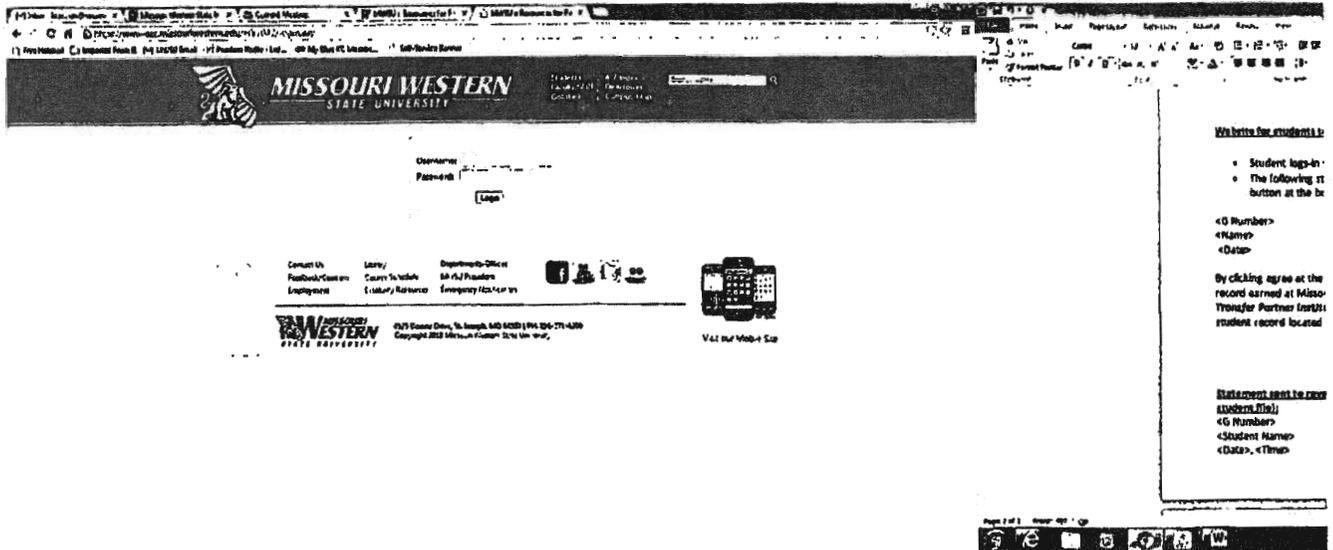
Student Signature: _____ Date: _____

4-year RTC Name: _____ Signature: _____

2-year RTC Name: _____ Signature: _____

* I understand that the institutional transcript release policy applies.

#2 Website for students to opt-in <https://www-sec.missouriwestern.edu/HB1042>

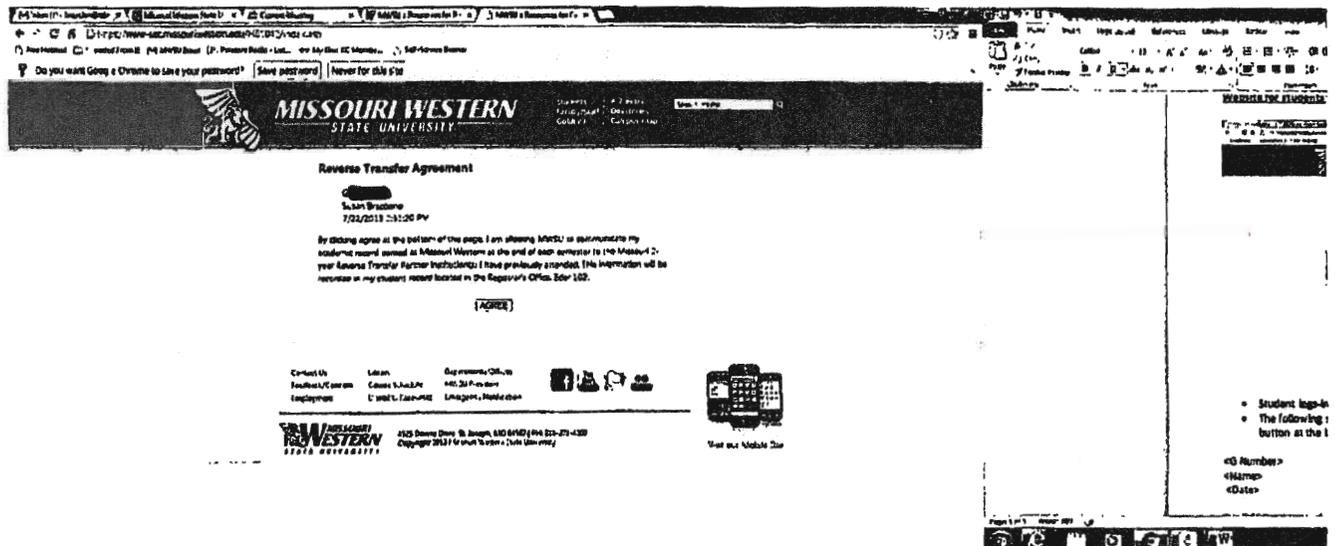


- Student logs-in with student userid and password.
- The following student information is auto-populated and the student will click on the AGREE button at the bottom of the message.

<G Number>
<Name>
<Date>

By clicking agree at the bottom of this page, I am allowing MWSU to communicate my academic record earned at Missouri Western at the end of each semester to the Missouri 2-year *Reverse Transfer Partner institution(s)* I have previously attended. This information will be recorded in my student record located in the Registrar's Office, Eder 102.

AGREE





Northwest Missouri State University

Search Northwest

11

Facebook, Twitter, YouTube, Pinterest icons

- Freshman Student
- Transfer Student
- International Student
- Other
- Quick Tools

Transfer students

- Welcome
- Campus Visit
- Apply Online
- Financial Aid and Scholarships
- Tuition, Costs and Fees
- Majors and Academics
- Enrollment Time line
- Orientation and Registration
- Student Life
- Community College Visit Schedule
- Request Information

Related Links

- Transferring Credits
- Reverse Transfer
- Partnership Programs
- Transfer Housing
- Student Employment

Refer a BEARCAT

Out-of-state students earn in-state rates



Apply Now



Submit your free online application now.

Bearcat Advantage

Out-of-state students earn in-state rates



Virtual Campus Tour



Take a virtual tour of campus.

Partnership Programs



Learn more about our Partnership Programs with other Missouri colleges.

Transfer Students

Why should you come to Northwest?

Quality Academics

Northwest offers more than 124 undergraduate majors and 73 minors. Ninety-five percent of our tenure track faculty has the highest degree in their fields, and our classes are taught by full-time professors, not by graduate assistants. Our faculty will challenge you academically while providing you the skills and knowledge necessary for a successful career.

Affordability

Northwest is one of the most affordable universities in the Midwest. Northwest offers a variety of automatic scholarships based on your GPA.

Hands-on Experience

In our Horace Mann Laboratory School, students majoring in education get a true inside view of what teaching is all about. Northwest offers several other opportunities for hands-on experience including interning at their own firms.

**#1 Reverse Transfer Partner Institutions Webpage <http://www.missouriwestern.edu/HB1042inst.asp>
(Missouri HB1042 links to <http://house.mo.gov/billtracking/bills121/billpdf/truly/HB1042T.PDF>)**

In compliance with Missouri HB1042, Missouri Western State University and our Missouri 2-year college partners participate in a reverse transfer process which may help qualified students to attain an associate degree. Students may "opt in" and agree to allow MWSU to electronically communicate their academic record earned at Missouri Western at the end of each semester to the Missouri 2-year Reverse Transfer Partner institution(s) they have previously attended.

The following Missouri 2-year Reverse Transfer Partner institution(s) have been established:
Metropolitan Area Community College
North Central Missouri College

As additional Missouri 2-year institutions are added to this official list of Reverse Transfer Partners, each student who previously approved their participation in the Reverse Transfer Program's will also have their academic record earned at Missouri Western sent to the additional schools, if applicable. Questions about this process may be directed to the Admissions Office or Registrar's Office.

In compliance with Missouri HB1042, Missouri Western State University and our Missouri 2-year college partners participate in a reverse transfer process which may help qualified students to attain an associate degree. Students may "opt in" and agree to allow MWSU to electronically communicate their academic record earned at Missouri Western at the end of each semester to the Missouri 2-year Reverse Transfer Partner institution(s) they have previously attended.

The following Missouri 2-year Reverse Transfer Partner institution(s) have been established:
Metropolitan Area Community College
North Central Missouri College

As additional Missouri 2-year institutions are added to this official list of Reverse Transfer Partners, each student who previously approved their participation in the Reverse Transfer Program's will also have their academic record earned at Missouri Western sent to the additional schools, if applicable. Questions about this process may be directed to the Admissions Office or Registrar's Office.

Missouri Western State University Reverse Transfer Communication

Statement on Admissions Application

In compliance with Missouri HB1042, Missouri Western State University and our Missouri 2-year college partners participate in a reverse transfer process which may enable you to attain an associate degree. By clicking "ACCEPT" you are agreeing to allow MWSU to communicate your academic record earned at Missouri Western at the end of each semester to the Missouri 2-year *Reverse Transfer Partner institution(s)* you have previously attended. Questions about this process may be directed to the Admissions Office.

1. As applications are received with reverse transfer approved by the student the Admissions Office will review to make sure it is applicable to that student's particular record.
2. The student will be coded with appropriate attribute in Banner.

After Census Date – Email is sent to current students who

- Transferred from a 2-year partner
- Do not have RT attribute

Dear <Student First Name>,

In compliance with Missouri HB1042, Missouri Western State University and our Missouri 2-year college partners participate in a reverse transfer process which may enable you to attain an associate degree. By clicking on the link at the bottom of this email (or copying and pasting it into your browser) you are agreeing to allow MWSU to communicate your academic record earned at Missouri Western at the end of each semester to the Missouri 2-year Reverse Transfer Partner Institution(s) you have previously attended. The Reverse Transfer Partner Institution(s) can be found at <http://www.missouriwestern.edu/HB1042Inst.asp> (see #1). Please contact the Registrar's Office if you have any questions about this process.

<https://www-sec.missouriwestern.edu/HB1042> (see #2)

Thank you,
Office of the Registrar

Dear «FirstName»,

How would you like to finish your Associate's Degree at Jefferson College (Jeffco) while enrolled at UMSL? "Reverse Transfer" will allow students to transfer credit from UMSL to Jeffco for the purpose of completing requirements for the Associate's degree. The agreement we have as partner institutions is designed specifically to allow students the advantages pursuant to completion of the Associate of Arts degree when they leave Jeffco prior to degree completion.

You might wonder "why do I need an Associate's Degree from Jeffco when I am already working towards my Bachelor's Degree at UMSL?" Some of the benefits to you as a student are:

- 1) **Job Marketability.** Associate Degree completers are more employable and earn a higher wage than those without a degree. The credential gives you an edge in the workforce while completing the bachelor's degree.
- 2) **Motivation** to complete the advanced degree. Current research shows that students who complete an Associate's Degree are more invested and motivated to complete the goal of a bachelor's degree.
- 3) Why **not** get the degree? Reverse Transfer makes it so easy for the eligible student with no additional coursework, cost or travel back to Jefferson College.

(Name) , I have reviewed your transcripts from Jefferson College and your completed course work at UMSL and believe you are eligible to participate in this new program.

To take advantage of this opportunity, you must first make an appointment to meet with me, the UMSL reverse transfer program co-coordinator, to discuss the process and opt-in to the program. Enclosed with this letter is the reverse transfer application. Please call 314-516-5915 to make an appointment and bring the completed form with you to this meeting. I will be happy to meet with you, and together, we can decide if reverse transfer is for you.

We encourage you to carefully consider this option and act on it soon. If you have questions, please call the Community College Relations office at 314-516-5915 or email mhattman@umsl.edu .

Who knows? You may already have the requirements completed! I hope to hear from you soon.

Best wishes for a successful conclusion to the spring 2013 semester.

Sincerely,

Melissa Hattman
Director, Community College Relations

PS: We sent you this message via email but are sending it this way also to ensure that you receive it.

We note that you transferred to UMSL from Jefferson College (Jeffco) having completed a minimum of 24 college credit hours but not a degree. We are therefore writing to inform you of an opportunity to complete Jeffco's requirements through "reverse transfer" and, as a result, to add an impressive degree to your resume while continuing your studies for your chosen baccalaureate degree at UMSL.

A "reverse transfer" requests Jeffco to accept UMSL credit to fulfill the Associate of Arts degree requirements at Jefferson College. There is no cost or exit assessment for using the reverse transfer to graduate from Jefferson College. To take advantage of this opportunity, you must first make an appointment to meet with Melissa Hattman, the reverse transfer program co-coordinator at UMSL to discuss the process and opt-in to the program. Enclosed with this letter is the reverse transfer application. Please call 314-516-5915 to make an appointment and bring the completed form with you to this meeting.

Best wishes for a successful conclusion to the spring 2013 semester.

Sincerely,

Alan Byrd
Associate Vice President for Enrollment Management

PS: We sent you this message via email but are sending it this way also to ensure that you receive it.

Enclosure

January 30, 2013

«FIRSTNAME» «LASTNAME»
«ADDRESS»
«City», «State» «Zip»

Dear «FirstName»,

Because you transferred from Ozarks Technical Community College (OTC) but did not earn a degree there, we want you to know about an opportunity to add an impressive degree to your resume **and** potentially save time and tuition in pursuit of your Missouri State University degree.

Students with an Associate of Arts (AA), Associate of Arts in Teaching (AAT) or the 43-hour transfer block from OTC have met MSU general education requirements. Students who do not must fulfill requirements on a course-by-course basis. Thus, unless you have taken all of the specific courses needed to meet our general education requirements, you will need to take additional general education courses. To see where you stand, review your degree audit on the academics tab of *MyMissouriState* (<http://my.missouristate.edu>).

We therefore encourage you to consider the following:

- If you believe that you **have** received your degree or 43-hour transfer block from OTC, please contact their Registrar at registrar@otc.edu to verify that it is on your transcript and request that an official copy be sent to MSU Admissions. OTC does not charge for transcripts.
- If you do not have a degree or 43-hour block, consider “**reverse transfer**” (details and an application are available at <http://www.otc.edu/registrar/17642.php>) whereby OTC may accept MSU credit to fulfill your OTC requirements. If you complete an AA, AAT, or the 43 hour block through reverse transfer, OTC will notify us and you will have met our general education requirements. There is no application fee or exit exam associated with reverse transfer at OTC. Even if you have completed MSU general education requirements, we encourage you to consider the advantage of receiving your AA or AAT degree for your resume.

Please carefully consider this information and act on it soon. If you have questions about degree or 43-hour block requirements at OTC, please email registrar@otc.edu. If you have questions about how completion of your degree or the 43 hour block through reverse transfer may benefit you, please contact your MSU advisor. If you have other questions, please call the Enrollment Services Office at 417-836-5521.

Best wishes for a successful conclusion to the fall semester.

Sincerely,



Donald E. Simpson
Associate Vice President for Enrollment Management

PS: We sent you this message via email but are sending it this way also to ensure that you receive it. Also, for your convenience, we have enclosed the OTC Reverse Transfer application. If you wish to pursue the reverse transfer, simply complete this form and return it to the MSU Office of the Registrar.

Enclosure

January 30, 2013

«FIRSTNAME» «LASTNAME»
«ADDRESS»
«City», «State» «Zip»

Dear «FirstName»,

We note that you transferred to us from Ozarks Technical Community College (OTC) having completed the 43 hour block but not a degree. We are therefore writing to inform you of an opportunity to complete OTC requirements through "reverse transfer" and, as a result, to add an impressive degree to your resume.

A reverse transfer requests OTC to accept MSU credit to fulfill degree requirements at OTC. There is no cost or exit assessment for using the reverse transfer to graduate from OTC. You simply send your official MSU transcript and reverse transfer application to OTC showing you have taken classes to fulfill your degree requirements. You then graduate with your OTC degree, your OTC transcript is noted and sent to MSU, and you will receive your OTC diploma in the mail. You will find additional information and a reverse transfer application at <http://www.otc.edu/registrar/17642.php>.

We encourage you to carefully consider this option and act on it soon. If you have questions, please call the Office of Enrollment Services at 417-836-5521. If you have questions about degree requirements at OTC, please email registrar@otc.edu.

Best wishes for a successful conclusion to the fall semester.

Sincerely,



Donald E. Simpson
Associate Vice President for Enrollment Management

PS: We sent you this message via email but are sending it this way also to ensure that you receive it. Also, for your convenience, we have enclosed the OTC Reverse Transfer application. If you wish to pursue the reverse transfer, simply complete this form and return it to the MSU Office of the Registrar.

Enclosure