

Demographic Information and Environment

1. Department of the person(s) completing the survey. (If you have a team working on filling out the survey, please check all the departments that apply):

- ☐ Admissions
- ☐ Registrar
- ☐ Distance Education
- ☐ Information Technology
- ☐ Other
-

2. Institution information

a. Name of institution (This will not be published in the survey results but will be used to correlate answers from the same school.)

b. What is the size of the distance education student population?

c. How many students go through the prospect process at one time?

d. If your institution offers both traditional and distance education degrees, are your student credentials (user-name/password) maintained and administered:

- i. Together
- ii. Separately
- iii. Other (please explain)

Please enter either i, ii or iii in the box on the right

e. If your institution offers both traditional and distance degrees, are the admission and registration functions:

- i. Combined/consolidated into one unit
- ii. Separate
- iii. Other (please explain)

Please enter either i, ii or iii in the box on the right.

f. Please provide your email address if you agree to be contacted regarding questions about your survey (if any):

First Contact with Prospect

3. How do you begin your recruiting process? (Check all that apply.)

- ☐ Internal aggregation of "suspects" (inquiries, camp attendees, etc)
- ☐ Obtain potential "suspects" from third Party
- ☐ Other (Please explain)
-

4. When do you first learn about prospective students? (Check all that apply.)

- ☐ a. Test Score Referrals
- ☐ b. High School Meetings
- ☐ c. Alumni/other gatherings

☐ d. Phone inquiries

☐ e. Other

5. How do prospective remote students make initial contact? (Check all that apply.)

☐ a. Submit an application

☐ b. Email inquiry

☐ c. Inquiry through campus recruiting portal

☐ d. Phone inquiries

☐ e. Request for site visit

☐ f. Response to Customer Relations Management (CRM) campaign

☐ g. Other

6. How do you establish an initial communications channel with the prospect? (Check all that apply.)

☐ a. Use the user-supplied email address.

☐ b. Establish/use institutional email address.

☐ c. Use the parent/guardian email address.

☐ d. Send by US Postal Service

☐ e. Contact by voice (phone)

☐ f. Contact through personal appearance

☐ g. Other

Assigning/Choosing Prospect Credentials

7. At what point is the first login credential chosen or assigned (e.g. email address, user id/password pair, etc.)?

☐ a. First contact from prospect and request for information

☐ b. Initial application

☐ c. Completed application portfolio

☐ d. Admitted

☐ e. Received deposit/earnest money

☐ f. Registration completed

☐ g. We don't assign initial login credentials. We accept existing credentials from services like Google, Facebook, Twitter, CollegeNet, etc.

☐ h. Other

8. For what purposes are this initial login credential used? (Check all that apply.)

☐ a. Admissions

☐ b. Financial aid

☐ c. Housing

☐ d. Course enrollment

☐ e. Learning management system access

☐ f. Distance education services

☐ g. Testing/assessment

☐ h. Campus services (portal, calendar, email, etc.)

☐ i. Other

9. Is your initial login credential assigned by a system or chosen by the user?

☐ Assigned by the system

☐ Chosen by the user

☐ Other

10. If the initial login credential is assigned by a system, how do you communicate the credential to the remote person? (Check all that apply.)

☐ a. Send via US Postal Service

☐ b. Send to a prospect-provided mobile number

☐ c. Send via email to a prospect-provided address

☐ d. Send a one-time link to a password selection page (via US Mail or email or mobile)

☐ e. Ask a prospect to access a webpage and choose/obtain login credentials (user id/password)

☐ f. Other

11. Is the initial login credential replaced by a different, permanent login credential at some point?

☐ Yes

☐ No

12. If permanent login credentials are chosen or assigned, please indicate at what point the permanent login credentials are established?

☐ a. Initial application

☐ b. Completed application portfolio

☐ c. Admitted

☐ d. Received deposit/earnest money

☐ e. Registration completed

☐ f. Other

13. How do you communicate the permanent login credential to the remote individual? (Check all that apply.)

☐ a. Send via US Postal Service

☐ b. Send to a user-provided mobile number

☐ c. Send via email to user-provided address

☐ d. Send via email to an institutionally-provided address

☐ e. Send a link to a password selection page

☐ f. Other

14. Upon first login with permanent credentials, is the person required to change the password?

☐ Yes

☐ No

Physical Identity Verification

15. At what point is supporting documentation about an individual received from external third parties (e.g., testing service, etc)? (Check all that apply.)

☐ a. Prior to first contact from person

☐ b. First contact from person and request for information

☐ c. Initial application

☐ d. Completed application portfolio

☐ e. Admitted

☐ f. Received deposit/earnest money

☐ g. Registration completed

☐ h. Never

16. If supporting documentation is received, does the new information result in increased confidence about the identity of the person?

☐ Yes

☐ No

17. Do you provide access to more sensitive information and services based on the increased confidence resulting from the documentation received from external third parties?

☐ Yes

☐ No

18. At what point do you perform primary identity proofing of the individual? (Identity proofing is the process used to verify the physical identity of an individual by having them present identifying documents such as a passport or drivers license or through challenge-response questions that contain information about the individual being "proofed" that would not be available to the general public.)

☐ a. First contact from prospect and request for information

☐ b. Initial application

☐ c. Completed application portfolio

☐ d. Admitted

☐ e. Received deposit money

☐ f. Registration completed

☐ g. None of the above. We don't do identity proofing.

☐ h. Other

19. Which business office is involved in doing the identity proofing of remote individuals? (Check all that apply.)

☐ a. Admissions

☐ b. Registrar

☐ c. Bursar

☐ d. Identity/Campus Card

☐ e. Orientation

☐ f. Academic Unit

☐ g. Distance Education

☐ h. Other

20. Does the identity proofing process result in any of the following (Check all that apply):

☐ a. Password reset requirement

☐ b. Issuance of an identity card

☐ c. Issuance of a new/permanent login credential

☐ d. Other

21. Why did you choose this point to perform primary identity proofing?

22. What information do you have about the remote person at this point? (Check all that apply.)

- ☐ a. Name
- ☐ b. Address
- ☐ c. Birth date
- ☐ d. Email address
- ☐ e. High school transcript
- ☐ f. Test scores
- ☐ g. Parent/guardian name
- ☐ h. Parent/guardian address and contact information
- ☐ i. Academic interest
- ☐ j. Academic term in which the student expects to enroll
- ☐ k. Financial aid information
- ☐ l. Credit card number or bank account number
- ☐ m. Post-secondary institution (if transfer student)
- ☐ n. Other notable

23. What document-related evidence do you require from the person to prove their physical identity and how is it sent to you?

	Email	Fax	US Postal Service	File Upload	Video/Skype
Government picture ID	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Credit card	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Physically notarized documents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Electronically notarized documents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

24. What other methods do you use to prove the physical identity of the person? (Check all that apply.)

- ☐ In-Person appearance at notary office
- ☐ In-Person appearance on campus
- ☐ Third-party vendor to validate identity. Please identify.

- ☐ Other

Auditing and Governance

25. Do you record the act of providing evidence for the identity proofing?

- ☐ Yes
- ☐ No

26. Do you capture the image of the evidence and link it to the person's record?

- ☐ Yes
- ☐ No

27. If changes were proposed to the identity proofing process for distance education students, who would be involved in the decision? (Check all that apply).

- ☐ a. Campus-wide governance board
- ☐ b. Admissions/Registrar Office
- ☐ c. Audit Office
- ☐ d. Identity/Card Office
- ☐ e. Office of General Council
- ☐ f. Security Office
- ☐ g. Privacy Office

- ☐ h. Distance Education Office
- ☐ i. IT Management Team
- ☐ j. IT Technical Staff
- ☐ k. Other

28. Please indicate any concerns with this process (e.g. having unauthorized individual obtain financial aid or gain access to FERPA-protected data, labor intensive, inconvenient for prospects and students):