

AACRAO Transfer & Articulation Community of Practice Forum



February 23: Student Information Systems

Today's Topic: Leveraging Student Information Systems in Transfer

Student Information Systems (SIS) can be like the deep pockets of the ocean

- Vast and uncharted with so many opportunities to learn
- Long and unknown history
 - Limited information why SIS's are set up the way they are
 - Proceed with caution
- Possess unexpected and powerful potential
 - Tapping into resources institutions possess
 - Data reporting
 - Historical records
 - Scripts, jobs, and hook-ups to third party tools for better business processes



Focus Questions

- What features within your SIS do you leverage to aid transfer articulation business processes? (For example, transfer course articulation rules, calendar conversion, course description storage, importing partner institutions' course catalogs, institution profiles, etc.)
- How do you add credit for prior learning to student records using your SIS?
- Do you store transfer course equivalency data within your SIS? If yes, how do you maintain this data over time?
- Have you leveraged your SIS to collect statistical data pertinent to transfer and articulation? If yes, what?
- How do you assign institution ID's to transfer institutions? IPEDS ID's, College Board CEEB codes, or something else?
 - Do you have a process for college networks which have multiple institutions but one central course catalog:
 - For example: Ivy Tech Community Colleges, Maricopa Community College, City Colleges of Chicago, etc.
- Do you connect your SIS with other tools or products (such as Collegesource, Degreeworks, homegrown tool) to aid transfer articulation? If yes, what other tools do you link up with?



Banner



Audrie Smith, Assoc. Director : Eastern Kentucky University
Josie Martinez, Asst. Registrar: University of Notre Dame

Ellucian Banner

The screenshot displays the 'Transfer Course Articulation SHATATR 9.3.29 (BNRTEST)' interface. At the top, it shows 'Institution: 150774 Holy Cross College' and 'Program: Default Institution:'. Below this is a table titled 'TRANSFERRING COURSE' with columns for 'Group', 'Primary', 'Subject', and 'Course'. The table lists five rows of ARTS courses (101, 102, 103, 110, 130), with the 110 course selected. A 'Banner Editor' window is open over the selected row, containing a text area with the following description: 'This course offers an introduction to the basics of digital photography. Students will learn a brief history of photographic imaging, focusing on major art movements, and apply this knowledge to the production of photographic images as they increase their understanding of basic composition, technical understanding of the camera, image editing, and the cultural relevance of contemporary photographic processes. They will also develop a portfolio of photographs as they increase their knowledge and skill through studio assignments, projects, and...'. Below the table, there are navigation controls showing '1 of 93' pages and '5 Per Page'. A 'Details' tab is active, and a 'Description' tab is also visible. At the bottom, there is a section for 'COURSE ATTRIBUTES'.

Group	Primary	Subject	Course
	<input type="checkbox"/>	ARTS	101
	<input type="checkbox"/>	ARTS	102
	<input type="checkbox"/>	ARTS	103
	<input checked="" type="checkbox"/>	ARTS	110
	<input type="checkbox"/>	ARTS	130

- Transfer course equivalency data storage (SHATATR)
- Calendar conversion calculator (STVCALD)
 - Ind. Student prior college to report new transcripts (SOAPCOL)
- SOABGTA - Institution profiles
 - Institution attributes (EKU)
- SHATAEQ
 - Placeholder courses (EKU)
- Smart codes for course not equivalent to what we offer (SCADETL & SCACRSE)

Banner - SOABGTA & Institution Attributes

SOABGTA Attributes help organize which schools are accepted in transfer.

Institution: 9616X American National University **Term:** 000000

▼ **INSTITUTION ACCREDITATION**

From Term

Accreditation *	Description
NRA	*** Not Regionally Accredited

Institution: 9665X Truth Baptist Bible College **Term:** 000000

▼ **INSTITUTION ACCREDITATION**

From Term

Accreditation *	Description
NDE	*** Not Recognized by DOE

STVCALD can be accessed from SOABGTA

Academic Calendar Credit Hour Conversion

Institution: ACE1 American Council on Education **Term:** 202420

▼ **GENERAL INFORMATION**

From Term

Highest Degree *** Unknown

Level Offered

Acceptance Practice *** Credit accepted provisionally

Calendar Type and Multiplier *** Straight Semester 1

Transfer Articulation Calendar Type (STVCALD)			
Criteria	<input type="text"/>		
Code	Description	Multiplier	ACTIVITY DATE
QTRS	Quarter to Semester	0.667	11/09/1994
SEMQ	Semester to Quarter	1.5	11/09/1994
SQTR	Straight Quarter	1	01/04/1991
SSEM	Straight Semester	1	11/10/1994

Banner - SHATAEQ & Placeholders

Courses recorded to student academic history requiring department evaluation= “N100”-placeholder course

Elective courses with no direct ECU equivalency= “X100”-elective course

Atten... Period	Term	Level	Transfer Group	Transfer Primary Ind	Transfer Subject	Transfer Course	Transfer Credit Hours	Transfer Grade	Transfer Duplicate	Transfer Title	Articulate Ind
1	202020	UG		<input type="checkbox"/>	ENG	106	3.000	C			No equivalent

Placeholder courses are created without leaving SHATAEQ.

Atten... Period	Term	Level	Transfer Group	Transfer Primary Ind	Transfer Subject	Transfer Course	Transfer Credit Hours	Transfer Grade	Transfer Duplicate	Transfer Title	Articulate Ind	Equiva... Level	Equivalent Subject	Equivalent Course	Equivalent Credit Hours	Equiva... Grade	Equiv... Mode	Equivalent Repeat	Equivalent Repeat System	Equiv... Count in GPA	Equivalent Title
1	202020	UG		<input type="checkbox"/>	ENG	106	3.000	C		English Course	Successful	UG	EKU	N100	3.000	C T	(None)	(None)	Y	English Course	

Elucian Banner - SCACRSE & SCADETL - Smart Codes

Course	Title	Credits	Repeatable	Requirements Met
HIST X9901	HIST 10000 Africa & Middle East History Elective	0-99	Yes	History of Africa & Middle East
HIST X9902	HIST 10000 Asian History Elective	0-99	Yes	History of Asia

Course Detail Information SCADETL 9.3.32 (BNRPROD)

Subject: HIST History Course: 39901 Term: 202320 Course Title: HIST 30000 Afr & Mid East Ele

Corequisites and Equivalents Fee Codes **Degree Attributes** Transfer Institutions Supplemental Data

DEGREE ATTRIBUTES

From Term Maintenance

Attribute *	Description
HBAM	HBAM-Hist of Africa&Middle East

1 of 1 Per Page

1st = Level
 2nd (9) = Transfer
 *3rd (9) = Dept Elec

Banner - CPL, Military

Most credit for prior learning is viewed and entered in the system as transfer credit.

External Exam Credit Military MOA/MOU

VETS|Ready
Opportunity
Portal

Branch

Military
Training/Occupation

Rank

Training Dates

Military Rank

N/A ▾

Training Dates

10/16-Present ▾

OSH 410W SAFETY MANAGEMENT SYSTEMS (3)
OSH 412 SAFETY & HEALTH PROGRAM MANAGEMENT (3)
OSH x3003 DEPARTMENTAL ELECTIVE CREDIT (3)
OSH x5003 DEPARTMENTAL ELECTIVE CREDIT (3)

Total Credits: 12

Suggested Program:

BS in [Occupational Safety](#)

[Explore](#) all Safety, Security & Emergency Management degree programs

[Explore](#) all College of Justice, Safety & Military Science degree programs

OLD: Branch Identification

NAVY	1250	Digital Principles
NAVY	1081	Solid State Electronics
NAVY	1526	Basic Electronics Lab
NAVY	1449	Microprocessors
NAVY	1730	Control Systems

NEW: ACE Identification

AR-0326	0065-V1	Defense Distribution Man
AR-0419	0046-V1	Cargo Specialist
AR-0419	0046-V2	Cargo Specialist
AR-0419	0046-V4	Cargo Specialist
AR-0419	0046-V5	Cargo Specialist

Banner Ellucian

- Transfer Data from SIS:
 - SHATATR Report: % of courses mapped to direct equivalents, electives, etc.
 - SHATRNS: # of transfer records created within date range
 - SHATRNS: # of students w/ transfer credit from different institutions (difficult to sort out TRANSFERS from students w/ transfer credit)
 - SHANCRS: Non-course attributes applied individually to students part of articulation agreements, status (completed requirements, in-progress, etc.)

Ellucian Banner - Maintaining EQ Data

Transfer Articulation Course Status Validation (STVTAST)		
Criteria	<input type="text" value="Q "/>	
Code	Description	Status
AC	Active Course	A
IN	Inactive	I
PN	Pending Approval	I
PR	Pre Raptor	I
RC	Review Title	I
RD	Review Course Credits	A
RR	Re-review Course	I

- Notre Dame uses transcript scanning product & custom built API create course information in SHATATC
- API has 3 checks in place when creating courses in SHATATC
 - Course already exists? Yes > Title different from prev.? > Yes > RC Review Title
 - Course already exists? Yes > Credits different from prev.? > Yes > Review Course Credits
 - Course already exists? Yes > Attached to term 5 years or longer? Yes > Re-review Course

Elucian Banner

- Transfer institution ID codes
 - ECU: CEEB codes & institution created codes (start with X)
 - ND: IPEDS & institution created codes (start with an alphabet letter)
 - Multi-campus networks (ECU)
 - Individual campus code recorded on student prior college record
 - One single code created for network and equivalencies established under one code
- Other tools connected to SIS
 - Degreeworks (degree audit)
 - ND: Raptor transcript reading program

Peoplesoft



Kimberly Mayfield, Transfer Operations: Indiana University

Peoplesoft

Indiana University campuses

- IU Bloomington
- IU Indianapolis
 - IU Columbus
 - IU Fort Wayne
- IU Kokomo
- IU Northwest
- IU Southeast
- IU East
- IU South Bend
- IU Online

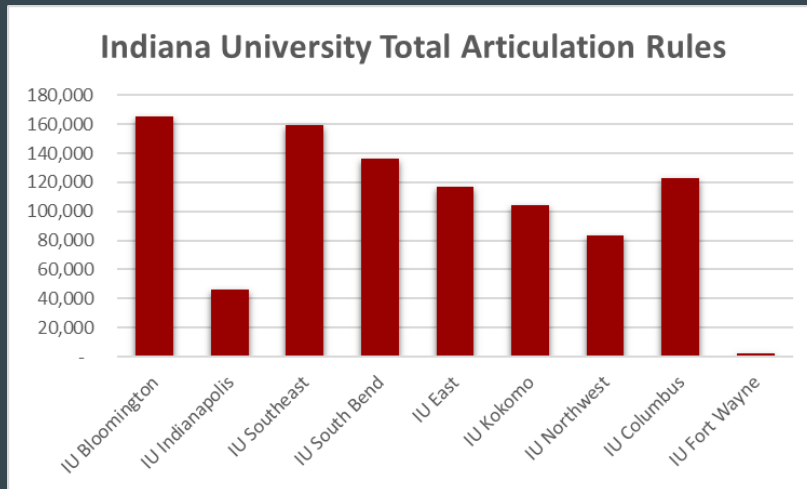
IU Credit and Transfer Setup

- Shared
 - Master Catalog
 - External Org Catalog
 - External Org IDs
- Individual
 - Campus Catalog
 - Articulation Rule Database
 - Evaluation Process



Peoplesoft

- What features within your SIS do you leverage to aid transfer articulation business processes?
 - Store and maintain transfer course articulation rules in PeopleSoft.
 - Over 930,000 rules across all IU campuses
 - IUI is restructuring rules so number listed is not accurate
 - Rules automatically applied to student records when admitted
 - External Org Catalog
 - Contains basic course info; such as course subject and number, name, credit hours, etc.



Peoplesoft

- How do you add credit for prior learning to student records using your SIS?
 - eSpecial Credit Process
 - Fireform utilized for evaluation process
 - Connects with SIS to utilize student info and course catalogs
 - Automated routing
 - Approvers may include; Dean, Bursar, Student, and Registrar
 - Records updates student record when they received the completed form
 - Other Credits - Manual page in SIS used to apply credit



The screenshot displays the 'eSpecial Credit' form in Peoplesoft. The form is titled 'Special Credit Request' and is divided into several sections:

- Student:** Includes a search field for 'istudent' and a 'Search' button.
- Ima Student:** Displays student information: University ID (0000000111), Network ID (istudent), and Term (Summer 2021). A 'Show past terms' link is also present.
- Program:** Lists the Institution/Career (BL Undergraduate), Program (Arts & Sciences Undergraduate), and Plan (Mgmt and Human Organization BA, Environmental Sci & Health MIN).
- Authorizing School:** A dropdown menu showing 'College of Arts & Sciences'.
- Special Credit to be Awarded *:** This section is highlighted with a red box. It contains a 'Course ID' search field with a 'Search' button and a 'Template' dropdown menu set to 'Do not use template'. A note below the search field states: 'Multiple courses may be added to this request.'
- Buttons:** 'Submit' and 'Cancel' buttons are located at the bottom of the form.

Peoplesoft

- Do you store transfer course equivalency data within your SIS? If yes, how do you maintain this data over time?
 - Articulation rules are stored in Peoplesoft for automated processes
 - Some historical articulation rule data is available but no specific dates
 - Articulation rules are grouped by External Course Subject
 - Chunks up the mass amount of rules
 - Allows for easy update to subject groups
 - Faculty reevaluate courses as needed
 - No centralized process to assist in reevaluating transfer courses
 - Evaluation activities and outcomes cannot be stored in Peoplesoft
 - TES houses evaluation task data

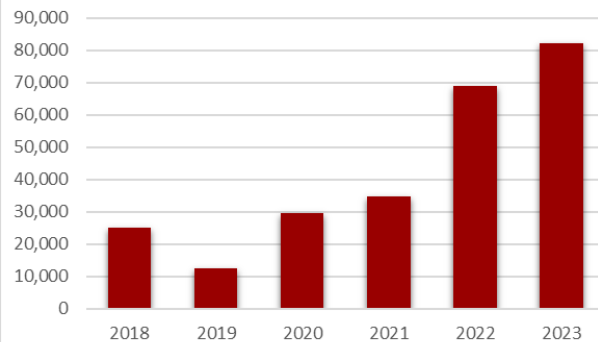


Peoplesoft

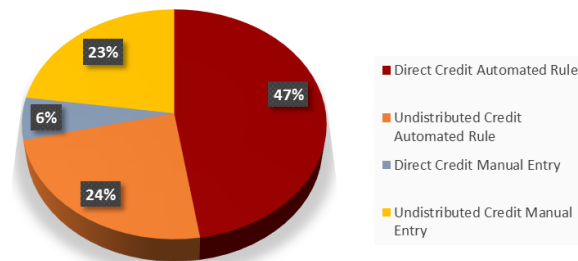
- Have you leveraged your SIS to collect statistical data pertinent to transfer and articulation? If yes, what?
 - IU Institutional Analytics takes snapshots of data and compiles reports
 - Used for official reporting
 - IU Information Environment - reporting and analytics database
 - My team pulls monthly data that includes number of rules created, student records processed, number of external subjects and courses added to the external org catalog, etc.
 - Auditing and other problem solving reports created on an ad hoc basis



Articulation Rule Creation by Year
- All IU except IUI



IU Credit Summary
- 2023



Peoplesoft

- How do you assign institution ID's to transfer institutions? IPEDS ID's, College Board CEEB codes, or something else?
 - All of the above.
 - Currently trying to unify data
 - Been through many different processes and standards over the years
 - Multi-campus networks
 - Currently only Ivy Tech is set-up where we use one ID for transcript indexing.
 - When students fill out their application they can still chose a specific campus but then transfer credit is entered under the umbrella ID
 - For other institutions we copy the rules across all the campuses.
 - SmartPanda Rule Import helps us with this work.

The screenshot shows the 'School Data' form for 'Purdue Univ West Lafayette'. The form is divided into several sections:

- Organization Details:** Includes 'Org ID' (0000028228), 'Effective Date' (03/01/2016), and 'Status' (Active).
- School Characteristics:** Includes checkboxes for 'Accredited' and 'Zero GPA', a 'Transcript Translation' checkbox, and a 'School Type' dropdown menu set to 'Coll/Univ'.
- School Codes:** Includes input fields for 'ATP' (1631), 'FICE', 'ACT', 'IPEDS', and 'NCES'.
- System Default Values:** Includes dropdown menus for 'Career' (Undergraduate), 'Term Type' (Semester), and 'Unit Type' (Semester Units).
- Catalog Information:** Includes a 'School District' field and a 'Shared Catalog' checkbox.



Peoplesoft

- Do you connect your SIS with other tools or products (such as Collegesource, Degreeworks, homegrown tool) to aid transfer articulation? If yes, what other tools do you link up with?
 - **OnBase** - document database
 - Embedded button in Peoplesoft Education Panel to directly open transcripts
 - **Credit Explorer** - homegrown public view of articulation rules
 - Pulls directly from the data in Peoplesoft
 - transferguide.iu.edu/ooe
 - **Collegesource TES & TES API**
 - Use TES for course descriptions
 - API automatically creates evaluation tasks in TES when triggered by activity in Peoplesoft
 - Shows other IU campus equivalencies
 - Only Regional campuses use API
 - **SmartPanda Rule Maker**
 - Batch create articulation rules
 - Create rules while processing individual student records



Colleague



Jacquie Rogers-Frere, Director: Saint Mary's College of Maryland
Becky Price: College of Southern Maryland

Elucian Colleague

- With the passage of Transfer with Success Act, College of Southern Maryland created new processes in Colleague (without creating custom screens) to help track not only transfer credits that are approved, but also transfer courses that are denied and the rationale why.
 - Using this process, CSM is able to run reports on the length of evaluations and on transfer denial courses.
- We use the same screens/processes for applying CPL that we do for transfer credit, but students receive a “PA” grade instead of a “TR” grade.
- We store equivalencies in the TCEQ screen. Working on a project to end date any equivalencies over 5 years old. CSM is using TES to manage the course evaluation process.
- Utilize CROA (connected) and TES (not connected) to help with our processes.

Colleague Transfer Screens

EXTS – External Transcript Summary

Institution : 0013395 Towson University

Detail	Ext Course	Equiv	Grade	Grade Scheme	Credits	Term	End Date
1	CRMJ 254	Yes			3.00		01/19/23
2	MATH 115	Yes			3.00		01/19/23
3	THEA 101	Yes			3.00		01/19/23
4	BIOL 200	Yes			3.00		01/19/23
5	GEOG 109	Yes			3.00		01/19/23
6	COMM 220	Yes	TD0	Undergraduate	0.00		01/19/23
7	FMST 101	Yes	TD0	Undergraduate	0.00		01/19/23
8	WMST 231	Yes	TD0	Undergraduate	0.00		01/19/23
9	FMST 201	Yes	TD0	Undergraduate	0.00		01/19/23
10	TSEM 102	Yes	TD1	Undergraduate	0.00		01/19/23
11	BIOL 204	Yes	TD7	Undergraduate	0.00		01/19/23
12	ENGL 317	Yes	TD0	Undergraduate	0.00		01/19/23

Institutions Attended Multiple-Equiv Resolution Screen No

GPA Credits GPA

EXTR – External Transcript Summary

EXTS * EXTR - External Transcript ☆*

Save Save All Cancel Cancel All

ID ██████ SSN ██████ Recul
 ██████ Home ██████
 Institution : 0013307 Bowie State University

External Course Status

Start Date SPEEDE

End Date

Title

Credits

Grade Scheme

Grade

Interim Grade/Date

Term

Category

Comments

1	<input type="text"/>
2	<input type="text"/>

Notes

	Notes	Date
1	<input type="text" value="DENY7 Unsatisfactory Grade"/>	<input type="text" value="01/05/23"/>
2	<input type="text"/>	<input type="text"/>

Institutions Attended

Colleague Transfer Screens (cont.)

TEEV – Transfer Equiv Evaluation

EXTS • TEEV - Transfer Equiv Evaluation ☆

Save Save All Cancel Cancel All

SEARCH RESULTS FOR : STU.COURSE.EQUIV.EVALS 0013307

STUDENT.EQUIV.EVALS Input Open

Transfer Course Value 1/1

Transfer Institution : Univ Maryland Baltimore Co

Transfer Course	Title	Credit	Gr	Cmpl Dt
1	MATH 151	0.00	TDO	03/09/2023
2				

Status	Equivalent Course	Title	Course Level	Equiv Dt	Credit	Term	Gr Scheme	Gr
1	TRD-0000	Transfer Credit	1000 First Y		0.00000		UG	TDO
DN	T Transfer	UG Undergraduat		03/09/2023				

#	Description	Transfer Course	Institution	Equivalent Course
1		COMM 101	Bowie State University	COM-1010
2	Per Depr Chair	ENGL 101	Bowie State University	ENG-1010
3		HEED 102	Bowie State University	WFS-1701
4	Research	ENGL 102	Bowie State University	ENG-1020
5		FRSE 101	Bowie State University	TRD-0000
6		MATH 99	Bowie State University	TRD-0000
7		MGMT 101	Bowie State University	TRD-0000
8		MATH 125	Bowie State University	TRD-0000
9		MGMT 241	Bowie State University	TRD-0000
10		MKTG 231	Bowie State University	TRD-0000
11		BIOL 203	Bowie State University	TRD-0000
12		HIST 114	Bowie State University	TRD-0000
13		MKTG 231	Bowie State University	TRD-0000

+ Add 1 - 13 of 13

Open 0 Selected Select All

STAC

- Courses that were successfully transferred will have course name and TR status entered
- Courses that were not transferred into the institution will be identified as TRD-0000 and will have denial reasons coded as grades
- Only courses that are successfully transferred in will be included on a student's transcript and will be included in financial aid eligibility calculations

STAC - Student Academic Credits ☆ Save Save All Cancel

1 of 2 Student Academic Credits Value 1/19

	Course Name	Title	Stat	Credits	CEUs	Term	Gr
1	<input type="checkbox"/> MTH-1120	College Algebra	TR	3.00			
2	<input type="checkbox"/> ENG-1010	Composition and Rheto	TR	3.00			
3	<input type="checkbox"/> PHL-1010	Intro to Philosophy (TR	3.00			
4	<input type="checkbox"/> BIO-2170	Hum Ana & Phy I With	TR	4.00			
5	<input type="checkbox"/> PSY-2050	Human Dev Life Span (TR	3.00			
6	<input type="checkbox"/> PSY-1010	General Psychology (B	TR	3.00			
7	<input type="checkbox"/> TRD-0000	Transfer Credit Denie	DN				TD1
8	<input type="checkbox"/> TRD-0000	Transfer Credit Denie	DN				TD1
9	<input type="checkbox"/> TRD-0000	Transfer Credit Denie	DN				TD1
10	<input type="checkbox"/> TRD-0000	Transfer Credit Denie	DN				TD7
11	<input type="checkbox"/> TRD-0000	Transfer Credit Denie	DN				TD1
12	<input type="checkbox"/> TRD-0000	Transfer Credit Denie	DN				TD1
13	<input type="checkbox"/> TRD-0000	Transfer Credit Denie	DN				TD1
14	<input type="checkbox"/> TRD-0000	Transfer Credit Denie	DN				TD1
15	<input type="checkbox"/> TRD-0000	Transfer Credit Denie	DN				TD8

Self Service Transfer Report

Bowie State University									
Transfer Course/Title	Credits	Grade	Completion Date	Equivalent Course/Subject/Course Level	Credits	Grade/Dept	Academic Level	Restrict to Academic Programs	
COMM 101/Oral Communications	3.00	-	1/5/2023	COM-1010	3.00	-	Undergraduate Level		
ENGL 101/Composition & Lit I	3.00	-	1/5/2023	ENG-1010	3.00	-	Undergraduate Level		
HEED 102/Life and Health	3.00	-	1/5/2023	WFS-1701	3.00	-	Undergraduate Level		
ENGL 102/Comp & Lit II	3.00	-	1/5/2023	ENG-1020	3.00	-	Undergraduate Level		
FRSE 101/Freshman Seminar	0.00	TD0	1/5/2023	TRD-0000	0.00	TD0	Undergraduate Level		
MATH 99/Transition to College Math	0.00	TD4	1/5/2023	TRD-0000	0.00	TD4	Undergraduate Level		
MGMT 101/Intro to Business	0.00	TD0	1/5/2023	TRD-0000	0.00	TD0	Undergraduate Level		

All credits that are transferred into the College of Southern Maryland will apply to the students' current program. How these credits apply to your program can be viewed on the My Progress page. Beginning August 1, 2022 students transferring in from a Maryland Public Institution will be able to view what college credit was not applied and the reasoning using the following key:

- TD0 - Program Requirement Already Fulfilled
- TD1 - Not Applicable to Program
- TD2 - Unique Discipline or Course
- TD3 - Does Not Meet Objectives/hrs
- TD4 - Developmental Course
- TD5 - Graduate Level Course
- TD6 - Institution Not Accredited
- TD7 - Unsatisfactory Grade
- TD8 - Course in Progress
- TD9 - Received Credit at Another Institution
- TDP - Transcript Evaluation Pending
- TDT - Credit Through Testing
- TDN - Request to Not Evaluate
- TDL - Credit Limit Reached

Credit Evaluation Tracking Reports

Daily Transcript Denial Report – All Decisions

Program of Study	Institution	Transfer Course	Transfer Title	Credits	Grade	Grade Key	CSM's Decision	CSM's Decision Date	Institution's Decision	Institution's Decision Date
	Towson University	MATH 263 RETAKE	Discrete Math	0.00	TD7	Unsatisfactory Grade	Unsatisfactory Grade	2/9/2023		
Pre-Professional Health Science, AS	Towson University	DFST 204	American Sign Lang III	0.00	TD8	Course in Progress	Course in Progress	2/9/2023		
Pre-Professional Health Science, AS	Towson University	MUSC 205	Women in Westn Music	0.00	TD8	Course in Progress	Course in Progress	2/9/2023		
Pre-Professional Health Science, AS	Towson University	NURS 347	Hlth Assmnt Across Life Span	0.00	TD2	Unique Discipline Or Course	Unique Discipline Or Course	2/9/2023		
Pre-Professional Health Science, AS	Towson University	NURS 356	Adult Hlth Nurs I: Found Lec	0.00	TD2	Unique Discipline Or Course	Unique Discipline Or Course	2/9/2023		
Pre-Professional Health Science, AS	Towson University	NURS 356C	Adlt Hlth Nurs I: Found Clin	0.00	TD2	Unique Discipline Or Course	Unique Discipline Or Course	2/9/2023		
Pre-Professional Health Science, AS	Towson University	NURS 361	Pharmacology	0.00	TD2	Unique Discipline Or Course	Unique Discipline Or Course	2/9/2023		
Pre-Professional Health Science, AS	Towson University	NURS 365	Pathophysiology	0.00	TD2	Unique Discipline Or Course	Unique Discipline Or Course	2/9/2023		
Pre-Professional Health Science, AS	Towson University	SPAN 201	Spanish Intermediate I	0.00	TD8	Course in Progress	Course in Progress	2/9/2023		
Pre-Professional Health Science, AS	Towson University	SPPA 101	Intro Human Comm & Its Variant	0.00	TD8	Course in Progress	Course in Progress	2/9/2023		
Accounting, AAS	Towson University	ACCT 421	Advanced Accounting	0.00	TD8	Course in Progress	Course in Progress	2/9/2023		
Accounting, AAS	Towson University	ACCT 680	Taxation of Entities	0.00	TD8	Course in Progress	Course in Progress	2/9/2023		
Accounting, AAS	Towson University	MKTG 445	Global Marketing	0.00	TD8	Course in Progress	Course in Progress	2/9/2023		
Computer Science, AS	Towson University	ACCT 341	Cost Accounting I	0.00	TD8	Course in Progress	Course in Progress	2/9/2023		
Computer Science, AS	Towson University	ACCT 361	Tax Accounting I	0.00	TD8	Course in Progress	Course in Progress	2/9/2023		
Computer Science, AS	Towson University	ASTR 161	Astronomy I	0.00	TD8	Course in Progress	Course in Progress	2/9/2023		
Computer Science, AS	Towson University	COSC 236	Intro to Cosc I	0.00	TD7	Unsatisfactory Grade	Unsatisfactory Grade	2/9/2023		
Computer Science, AS	Towson University	ECON 470	Advanced Topics in Economics	0.00	TD8	Course in Progress	Course in Progress	2/9/2023		
Computer Science, AS	Towson University	GEOG 101	Physical Geography	0.00	TD8	Course in Progress	Course in Progress	2/9/2023		

Benefits

For Students

- Better understanding of what courses did not transfer to the new institution and why those credits were not approved.
- Can see individual course listing on Self Service, along with denial reason (if applicable).
- Cuts down on questions coming into the registrar's office.
- Potential for streamlined re-evaluation situations when a student changes programs.

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For Institutions

- Gain a better understanding of what courses do not transfer to facilitate examination of course learning objectives to ensure the greatest future transfer potential.
- General education courses must transfer, regardless of whether an equivalent course exists at the receiving institution.
- Helps pre-emptively answer questions for students

Homegrown SIS



Deslie Ghiorzi, Operations Manager: University of Phoenix
Nathan Cicchillo, Sr. Director: University of Phoenix

Homegrown SIS: Osiris

OSIRIS - STUDENT HISTORY

ADCF009 STUDENT HISTORY 02/21/2024

IRN [REDACTED] SSN [REDACTED] High School 01 High School Document

LName [REDACTED] FName [REDACTED] MI [REDACTED]

Program BSCYB Version 001B Admission Stat. AC FA Stat. RG

Student Academic Status RG Effective Date 12/06/2023 End Date [REDACTED]

Program Academic Status RG Effective Date 02/20/2024 Enroll Agreement 12/06/2023

Enrollment Status Active-Full Time Sign Date 01/30/2024 Enroll Status Date

DATE	INITIALS	CORRES TYPE	COMMENTS
02/20/2024	J5LOPEZ	O	Student is Officially Evaluated
EVALUATION STATUS UPDATED TO "OF" FOR BSCYB - 001B. ENROLLMENT AGREEMEN			
02/20/2024	OPSSJ5LOPEZ	NT	Note
NO COURSE WAIVERS IDENTIFIED AT OFFICIAL EVALUATION.			
02/15/2024	OPSSBOTADMIS	FF	WIN File Fwd to AE
TO AE : BSCYB 001B ONLINE			
02/15/2024	OPSSMHERNAN	NT	Note
GATEWAY TECHNICAL COLLEGE SCHOOL WAS AUTO-DATED IN MATERIAL TRACKING			

Ent Qrv Exe Qrv Next Block Prev Blo... HS Hist...

OSIRIS - ACTIVITY ENTRY SCREEN

SRCF001 UPDATE 02/21/2024

Student Info

IRN [REDACTED] SSN [REDACTED] Alias [REDACTED]

Student Schools

Zip 53144 School GATEWAY TECHNICAL COLLEGE Tot Crd Att 33.00

Transcribed Activities

MM/Year	Activity	Id/Name	Attempted	Grade	Eval
09/2009		605113	3.00	C	Y
DCIAC I					
09/2009	612 102		3.00	W	N
PNEUMATICS/HYDRAULICS - INTRO					
09/2009	328109		3.00	W	N
MECHANICAL SKILLS FOR TECH					
09/2009	804113		3.00	F	N
COLLEGE TECHNICAL MATH 1A					
09/2009	804114		2.00	F	N
COLLEGE TECHNICAL MATH 1B					
01/2012	801136		3.00	B-	Y
ENGLISH COMPOSITION 1					

Please enter course academic year (MMYYYY) or Pg Dn to copy from previous record.

Record: 1/?

Workbench

Evaluation Resources Recent IRIs UOP Theme

Schedule Term Notes Program Maintenance P&P Copy IRN Version Control

History

Previous Name: Home State: WI Student Academic Status: RG Financial Campus: ON-LINE
 Maiden Name: Mail to State: WI Effective Date for SAS: HS Confirmation: 01=High School Document
 SSN: Overridden State: Total Declared Ext. Credits: 0
 DOB: Last Date of Attendance: 02/19/2024 Candidacy Status: N/A

Type	Email
INTERNET	
OLS	

Program	Version	Type	GPA	Admission Status	Admission Date	Evaluation Status	Evaluation Date	Enroll Agreement Sign Date	Admissibility Date	Program Version Change Start Date	Academic Complete Date	Diploma Date	Academic Status	Program OLDA
* BSCYB	001B	U		AC	12/06/2023	OF	02/20/2024	12/06/2023	12/06/2023				RG	02/18/2024
Campus Name		Org #	Team	EC	Rev Org	Program Completion Deadline Date	Active							
ONLINE		31	TEAM 3132A	BNSTELL	SD-ONL	01/30/2032	Active							

Transcript List 2nd Tier NTPs

Run Degree Audit View Degree Audit Show/Create Letters

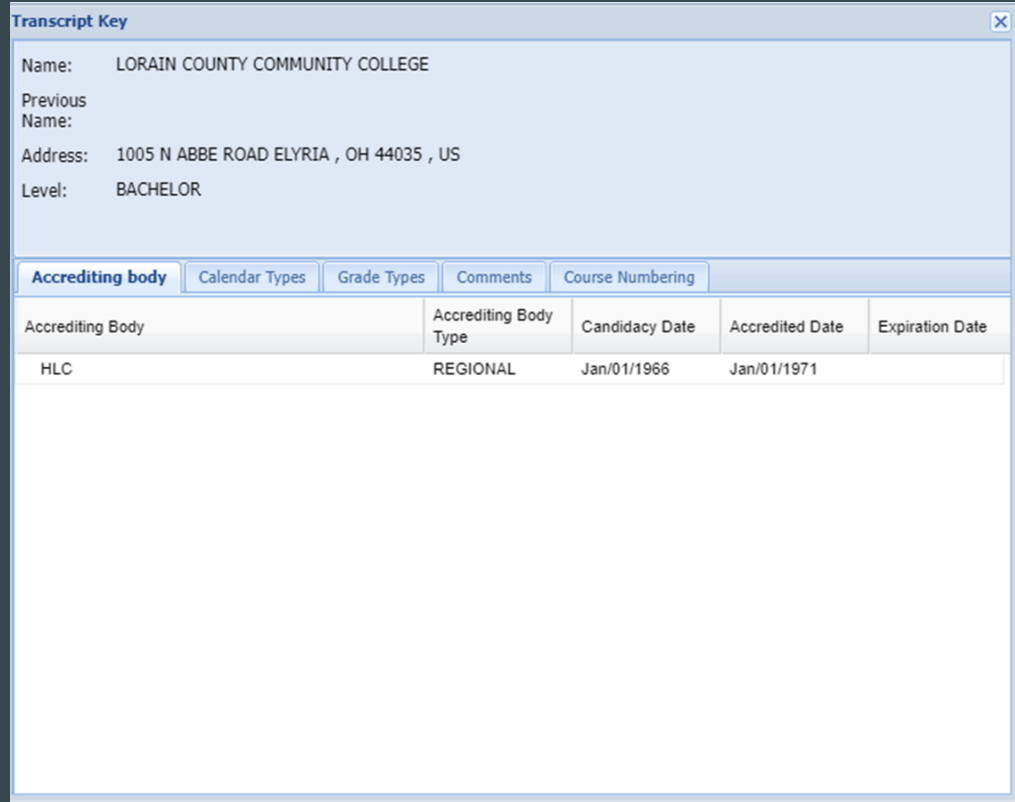
All Schools (0/11) Category/Area Save All Add Course Degree Information Run Reuse Audit Delete Course Clear All Add Institution Delete Institution Misc Options Shortcuts

EV	R	TC	NT	Date (MM/YYYY)	Course Id	Course Title	Entered	Attempted	Earned	Grade	Division	Categories
●		Y		09/2009	605113	DC/AC 1	3	3	3	C	LD	
●	⬇	N	NC	09/2009	612 102	PNEUMATICS/HYDRAULICS - INTRO	3	3	0	W	LD	
●	⬇	N	NC	09/2009	326109	MECHANICAL SKILLS FOR TECH	3	3	0	W	LD	
●	⬇	N	UG	09/2009	604113	COLLEGE TECHNICAL MATH 1A	3	3	0	F	LD	
●	⬇	N	UG	09/2009	604114	COLLEGE TECHNICAL MATH 1B	2	2	0	F	LD	
●		Y		01/2012	601136	ENGLISH COMPOSITION 1	3	3	3	B-	LD	5-GENERAL ED PSS ENG1 3-PROFICIENCY ENGLISH GENERAL ED COMM ARTS
●		Y		01/2012	609166	INTRO TO ETHICS: THEORY & APP	3	3	3	C-	LD	GENERAL ED HUMANITIES
●		Y		01/2012	609196	INTRO TO PSYCHOLOGY	3	3	3	B	LD	5-GENERAL ED PSS PSY
●		Y		01/2012	609196	INTRO TO SOCIOLOGY	3	3	3	C	LD	

FOCUS QUESTION:

What features within your SIS do you leverage to aid transfer articulation business processes?

- “Transcript Key” provides transfer institution information to assist with evaluations
- Course description storage and partner institution course catalogs are not stored in our SIS systems.
- The Articulation team stores those separately in their own team storage folders as reference.



The screenshot shows a window titled "Transcript Key" with a close button (X) in the top right corner. The main content area displays the following information:

Name: LORAIN COUNTY COMMUNITY COLLEGE
Previous Name:
Address: 1005 N ABBE ROAD ELYRIA , OH 44035 , US
Level: BACHELOR

Below this information is a tabbed interface with five tabs: "Accrediting body", "Calendar Types", "Grade Types", "Comments", and "Course Numbering". The "Accrediting body" tab is currently selected and displays a table with the following data:

Accrediting Body	Accrediting Body Type	Candidacy Date	Accredited Date	Expiration Date
HLC	REGIONAL	Jan/01/1966	Jan/01/1971	

FOCUS QUESTION:

Do you store transfer course equivalency data within your SIS? If yes, how do you maintain this data over time?

Institution Search Course Search

Course Search

Course ID: Course Title: State: Institution: GATEWAY TECHNICAL COLLEGE Source: All

Dates

Start Date: End Date: Search

Reuse Evaluation

Resources

E	Non-Transferable	Course ID	Course Title	Min Credits	Max Credits	Division	Source	Conf Level	Date Effective m/y/or/m/d/y	Date Expires m/y/or/m/d/y	Categories
Y		001-107	HORTICULTURE/INTRODUCTION TO	3	3	LD	Articulation	5	08/01/2004	07/31/2006	GENERAL ED. DISC. 08/2004, 07/2006, 5
Y		001-117	LANDSCAPE DESIGN/ADVANCED	3	3	LD	Articulation	5	08/01/2004	07/31/2006	GENERAL ED. DISC. 08/2004, 07/2006, 5
Y		001-120	LANDSCAPING/INTERIOR	3	3	LD	Articulation	5	08/01/2004	07/31/2006	GENERAL ED. DISC. 08/2004, 07/2006, 5
Y		001-122	HORTICULTURE BUSINESS OPERATIONS	3	3	LD	Articulation	5	08/01/2004	07/31/2006	GENERAL ED. DISC. 08/2004, 07/2006, 5
Y		001-128	HORTICULTURE MARKETING	3	3	LD	Articulation	5	08/01/2004	07/31/2006	GENERAL ED. DISC. 08/2004, 07/2006, 5
Y		001-130	LANDSCAPE PLANTS I	3	3	LD	Articulation	5	08/01/2004	07/31/2006	GENERAL ED. DISC. 08/2004, 07/2006, 5
Y		001-132	LANDSCAPE PLANTS II	3	3	LD	Articulation	5	08/01/2004	07/31/2006	GENERAL ED. DISC. 08/2004, 07/2006, 5
Y		001-134	TURF AND LAWN MANAGEMENT	3	3	LD	Articulation	5	08/01/2004	07/31/2006	GENERAL ED. DISC. 08/2004, 07/2006, 5
Y		001-135	PLANT PROPAGATION	3	3	LD	Articulation	5	08/01/2004	07/31/2006	GENERAL ED. DISC. 08/2004, 07/2006, 5
Y		001-136	LANDSCAPE MAINTENANCE/NURSERY OPERATIONS	3	3	LD	Articulation	5	08/01/2004	07/31/2006	GENERAL ED. DISC. 08/2004, 07/2006, 5
Y		001-140	LANDSCAPE DESIGN/INTRODUCTION	3	3	LD	Articulation	5	08/01/2004	07/31/2006	GENERAL ED. DISC. 08/2004, 07/2006, 5
Y		001-141	SOILS AND PLANT NUTRITION	3	3	LD	Articulation	5	08/01/2004	07/31/2006	GENERAL ED. SC/NCE/TECH 08/2004, 07/2006, 5 GENERAL ED. NAT SC/NCE 08/2004, 07/2006, 5 GENERAL ED. PHIBIO SCI 08/2004, 07/2006, 5
Y		001-143	BEDDING PLANTS	3	3	LD	Articulation	5	08/01/2004	07/31/2006	GENERAL ED. DISC. 08/2004, 07/2006, 5
Y		001-144	FLORAL DESIGN I/COMMERCIAL	3	3	LD	Articulation	5	08/01/2004	07/31/2006	GENERAL ED. DISC. 08/2004, 07/2006, 5
Y		001-145	FLORAL DESIGN II/COMMERCIAL	3	3	LD	Articulation	5	08/01/2004	07/31/2006	GENERAL ED. DISC. 08/2004, 07/2006, 5
Y		001-151	GREENHOUSE CROPS	3	3	LD	Articulation	5	08/01/2004	07/31/2006	GENERAL ED. DISC. 08/2004, 07/2006, 5
Y		001-155	GARDEN CENTER OPERATIONS	3	3	LD	Articulation	5	08/01/2004	07/31/2006	GENERAL ED. DISC. 08/2004, 07/2006, 5

- Within Workbench, we input Articulated G.E. decisions for partner intuitions.
- All articulated transfer decisions are stored in Admissions Workbench and are updated on a yearly basis.
- We pay special attention to effective dates. If a decision has changed based on the new catalog year, we end date the old decision and create a new entry with the new effective date.

Automated Transfer Credit Articulated Decisions

1) Transcripts are data entered, ready for evaluation

Run Degree Audit | View Degree Audit | Show/Hide Letters

All Schools (11/11) | Category/Area | Save All | Add Course | Degree Information | Run Reuse Audit | Delete Course | Clear All | Add Institution | Delete Institution | Misc Options | Shortcuts

EV	R	TC	NT	Date (MM/YYYY)	Course Id	Course Title	Ent...	Attempted	Ear...	Grade	Divi...	Categories
●		P		09/2009	605113	DC/AC I	3	3	3	C	LD	
●		P		09/2009	612 102	PNEUMATICS/HYDRAULICS - INTRO	3	3	3	W	LD	
●		P		09/2009	328109	MECHANICAL SKILLS FOR TECH	3	3	3	W	LD	
●		P		09/2009	804113	COLLEGE TECHNICAL MATH 1A	3	3	0	F	LD	
●		P		09/2009	804114	COLLEGE TECHNICAL MATH 1B	2	2	0	F	LD	
●		P		01/2012	801136	ENGLISH COMPOSITION 1	3	3	3	B-	LD	
●		P		01/2012	809166	INTRO TO ETHICS: THEORY & APP	3	3	3	C-	LD	
●		P		01/2012	809198	INTRO TO PSYCHOLOGY	3	3	3	B	LD	
●		P										
●		P										
●		P										
●		P										

1) Reuse is ran to check for any articulated decisions

GATEWAY TECHNICAL COLLEGE (01/11) | Category/Area | Save All | Add Course | Degree Information | Run Reuse Audit | Delete Course | Clear All | Add Institution | Delete Institution | Misc Options | Shortcuts

EV	R	TC	NT	Date (MM/YYYY)	Course Id	Course Title	Ent...	Attempted	Ear...	Grade	Divi...	Categories
●		E		09/2009	605113	DC/AC I	3	3	3	C	LD	
●		Y		01/2012	801136	ENGLISH COMPOSITION 1	3	3	3	B-	LD	5-GENERAL ED PSS ENG1 3-PROFICIENC ENGLISH GENERAL ED COMM ARTS
●		E		01/2012	809166	INTRO TO ETHICS: THEORY & APP	3	3	3	C-	LD	GENERAL ED HUMANITIES
●		Y		01/2012	809198	INTRO TO PSYCHOLOGY	3	3	3	B	LD	5-GENERAL ED PSS PSY
●		Y		01/2012	809196	INTRO TO SOCIOLOGY	3	3	3	C	LD	
●	🌿	N	NC	09/2009	612 102	PNEUMATICS/HYDRAULICS - INTRO	3	3	0	W	LD	
●	🌿	N	NC	09/2009	328109	MECHANICAL SKILLS FOR TECH	3	3	0	W	LD	
●	🌿	N	NC	09/2012	806134	GENERAL CHEMISTRY	4	4	0	W	LD	
●	🌿	N	UG	09/2009	804113	COLLEGE TECHNICAL MATH 1A	3	3	0	F	LD	
●	🌿	N	UG	09/2009	804114	COLLEGE TECHNICAL MATH 1B	2	2	0	F	LD	
●	🌿	N	UG	09/2012	804113	COLLEGE TECHNICAL MATH 1A	3	3	0	F	LD	

FOCUS QUESTION:

How do you assign institution ID's to transfer institutions? (Districts vs Individual Campuses)

- Internal process: We use ORGA IDs for each institution.
- Depending on how the institution's transcripts are issued (as a district or as individual college/campus) we issue one ORGA ID for each District, or multiple ORGA ID's for each college/campus.

Zip	Orga_#	SAT	City	ST	School Name
11201	232225		BROOKLYN	NY	DEVRY COLLEGE OF NE
10036	232230		NEW YORK	NY	DEVRY COLLEGE OF NE
10010	232295		NEW YORK	NY	DEVRY COLLEGE OF NE
11374	232296		REGO PARK	NY	DEVRY COLLEGE OF NE
T2A 7W4	8403		CALGARY	AB	DEVRY INSTITUTE OF TI
60101	232254		ADDISON	IL	DEVRY UNIVERSITY - AC
91803	232232		ALHAMBRA	CA	DEVRY UNIVERSITY - AL
30022	232329		ALPHARETTA	GA	DEVRY UNIVERSITY - AL
30004	6130		ALPHARETTA	GA	DEVRY UNIVERSITY - AL
92806	232233		ANAHEIM	CA	DEVRY UNIVERSITY - AN
22202	45350		ARLINGTON	VA	DEVRY UNIVERSITY - AF
30342	232316		ATLANTA	GA	DEVRY UNIVERSITY - AT
30305	232326		ATLANTA	GA	DEVRY UNIVERSITY - AT
30339	232327		ATLANTA	GA	DEVRY UNIVERSITY - AT
30346	232315		ATLANTA	GA	DEVRY UNIVERSITY - AT

FOCUS QUESTION:

How do you add credit for prior learning to student records using your SIS?

Osiris Imaging eXit Help Window

OSIRIS - ASSESSMENT CENTER ACTIVITY ENTRY

GDCF003 UPDATE ASSESSMENT CENTER ACTIVITY ENTRY 02/21/2024

IRN: SSN:

LName: FName: MI:

Program: BSHA Version: 004B Program GPA: 3.87 EvalFee Credit?: N

Course ID	Earn	Nurs			GR	Paid		Print Grade Letter		
		LD	UD	GR		Grade	Assessment Title	Grade Date		
PEL/299	1.50	N	1.50	0.00	0.00	P	N	CERTIFIED PHARM	N	01/29/2024
PEL/299	1.50	N	1.50	0.00	0.00	P	N	CERTIFIED PHARM	N	01/29/2024
PEL/299	3.00	N	3.00	0.00	0.00	P	N	CERTIFIED PERSON	N	01/29/2024
PCT/299	3.00	N	3.00	0.00	0.00	P	N	CERTIFIED YOGA IN	N	01/29/2024
PCT/299	2.00	N	2.00	0.00	0.00	P	N	NUTRITIONIST - ISS	N	01/29/2024

Enter 'Y' to give Credit for Initial Evaluation Fee; else 'N'.

- Each PLA type has its own course ID/prefix

PLA credits are applied using old SIS interface

FOCUS QUESTION:

Have you leveraged your SIS to collect statistical data pertinent to transfer and articulation?

Within the Office of Admissions and Evaluations dept, we use Microsoft Power BI to stage transfer data that pulls from SIS.

48.13

Prog Lvl Avg Accepted

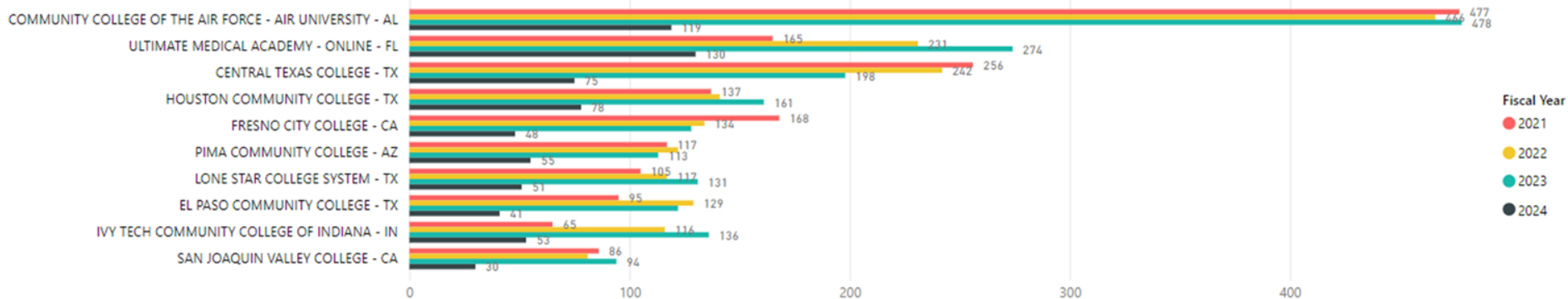
39.33

Prog Lvl Avg Applied

82.27%

Prog Lvl Transferability

Student Volume



Presenters

Banner:

- Audrie Smith: audrie.smith@eku.edu
- Josie Martinez: regtransfer@nd.edu

Peoplesoft:

- Kim Mayfield: kfmuehlh@iu.edu

Colleague:

- Jacqui Rogers-Frere: jgrogers@smcm.edu
- Becky Price: rlposner@csmd.edu

Homegrown:

- Deslie Ghiorzi: Deslie.Ghiorzi@phoenix.edu
- Nathan Cicchillo: nathan.cicchillo@phoenix.edu

Upcoming Webinars

- Next session: April 26, topic third-party transfer tools
- [View and sign-up for sessions](#) from AACRAO's webpage