CMS Common Management Systems

AD Evaluations Setup Guide v. 8.0

First Time Freshman, Lower Division Transfer & Upper Division Transfer

Last Revised: **12/17/03**

FINAL

REVISION CONTROL

Document Title: AD Evaluations Setup Guide

Author: SA Functional Lead, Admissions and Recruitment

File Reference: AD Evaluations Setup Guide-v80-12172003.doc

Date	By	Action	Pages
01/17/02	Allison Miller	New Document	All
9/09/02	Marlene Rosenfeld	Revisions & Additions	All
10/10/03	David Cartwright	Revised document to reflect current versions of functionality	All
12/17/03	Tosha Pham	Revised document to reflect current versions of functionality	All

Review/Approval History

Date	By	Action	Pages

This document is published as a baseline guide. Panel shots may reflect campus specific information, provided as examples only. Any questions concerning this document should be addressed to the CMS/SOSS Student Administration team.

Table of Contents

1.0   Setting up Evaluations

The CSU has established standard minimum admission requirements for undergraduates and graduates students. To ensure the consistency of these standard minimum admission requirements and evaluation processing (e.g., the rating component, rating scheme, evaluation codes, and modified SQCs) for all the CSU campuses, CMS Central provides the necessary set-up data for first time freshman (FTF), lower division transfers (LDT), and upper division transfers (UDT) processing. Individual campuses may create any additional campus-specific admission requirements and SQCs for impacted or high-demand majors.

Before you begin evaluating applicants, applications must be fully entered and posted into the system. You must set up rating components and rating schemes, evaluation codes, evaluation status codes, external summary types, and GPA types. CMS Central has provided the required setup for evaluation processing. Without these required setups, the modification will not process correctly. CMS Central has delivered the required setups via scripts. The chart below provides the record names associated with the Evaluations Modification required setup.

PeopleSoft Table Name	PeopleSoft Page	Description/Notes	Document X-Ref
EVAL_STATUS_TBL	Evaluate Applicants, Setup, Evaluation Status Table	This table is used to define evaluation statuses for Admissions. SOSS will deliver rows necessary for the evaluation modifications. Campuses may insert rows as necessary for their own evaluations	**AD01008-v80FS-Automated Process for Evaluation and Admissions Requirements**
EXT_SUMM_TP_TBL	Design Admissions, Setup, External Summary Type Table	This table is used to define the types of transcript summary data you wish to store. SOSS will deliver rows necessary for the evaluation modifications. Campuses may insert rows as necessary for their own requirements	**AD01008-v80FS-Automated Process for Evaluation and Admissions Requirements**
GPA_TYPE_TBL	Design Admissions, Setup, GPA Type Table	This table is used to define the types of GPA's you wish to track from transcripts. SOSS will deliver rows necessary for the evaluation modifications. Campuses may insert rows as necessary for their own requirements.	**AD01008-v80FS-Automated Process for Evaluation and Admissions Requirements**
MATL_GRP_TBL	Design Admissions, Setup, Material Groups Table	This table is used to define the materials you wish to track to evaluate applicants. SOSS will deliver rows necessary for the evaluation modifications. Campuses may insert rows as necessary for their own requirements.	**AD01008-v80FS-Automated Process for Evaluation and Admissions Requirements**

MATL_GRP_TYP_TABLE	Design Admissions, Setup, Material Group Type Table	This table is used to group the types of materials you wish to track to evaluate applicants. SOSS will deliver rows necessary for the evaluation modifications. Campuses may insert rows as necessary for their own requirements.	**AD01008-v80FS-Automated Process for Evaluation and Admissions Requirements**
RATING_CMP_TBL	Evaluate Applicants, Setup, Rating Table	This table is used to define evaluation rating components for Admissions. SOSS will deliver rows necessary for the evaluation modifications. Campuses may insert rows as necessary for their own evaluations	**AD01008-v80FS-Automated Process for Evaluation and Admissions Requirements**
RATING_SCH_TBL	Evaluate Applicants, Setup, Rating Table	This table is used to define evaluation rating schemes for Admissions. SOSS will deliver rows necessary for the evaluation modifications. Campuses may insert rows as necessary for their own evaluations	**AD01008-v80FS-Automated Process for Evaluation and Admissions Requirements**
SA_TCMP_REL_TBL	Design Admissions, Setup, Test Tables	This table is used to connect components to tests. SOSS will deliver rows necessary for the evaluation modifications. Campuses may insert rows as necessary for their own requirements.	**AD01008-v80FS-Automated Process for Evaluation and Admissions Requirements**
SA_TEST_CMP_TBL	Design Admissions, Setup, Test Components	This table is used to define test components you wish to track. SOSS will deliver rows necessary for the evaluation modifications. Campuses may insert rows as necessary for their own requirements.	**AD01008-v80FS-Automated Process for Evaluation and Admissions Requirements**

To perform automated evaluations, you must first set up rating components, rating schemes, evaluation codes, evaluation status codes, GPA and summary types, and evaluation code assignment rules. The remainder of this document addresses each of these areas of required setup.

1.1   Rating Component Definition Table

Navigation: Home→ **Design Student Administration** → **Design Admissions** → **Setup** → **Rating Comp Definition Table**

The rating component definition table is used to define the individual evaluation components that will be used in performing automated evaluations. A rating component can be extracted from application materials (such as ACT or SAT scores or high school GPA), or it can be a calculated value (such as the CSU Eligibility Index), or it can represent a summary (such as the OVER component, which is the sum of individual scores for eligibility index, college prep subject requirements, and overall subject area requirements).

1.1.1   Considerations

This is a sample of one setup page for the Rating Comp Definition Table. The rating components that will need to be defined depend on which automated evaluation processes you plan to implement on your campus. The following tables show the components by evaluation type:

First Time Freshman

Rating Component	Description
ACT	Highest ACT Score
ELECT	Total Elective Years
ELGID	Eligibility Index
ENGLS	Total English Years
HSGPA	High School GPA
INDEX	GPA/Test Score Index
MATH	Total Math Years
OVER	Overall Rating
SAT	Highest SAT Score
SCINC	Total Science Years
SOCS	Total U.S. History and Social Science Years
SUBJT	Overall Subject Requirements
TSUBJ	Subject Area Requirements

Lower Division Transfers

The components for Lower Division Transfers include all of the components for first-time freshmen *plus* the following additional components to capture transfer grades and eligibility to re-enroll at the student's current institution:

Rating Component	Description
GOODS	Good Standing
TRGPA	College Transfer GPA

Upper Division Transfer

Because of the different requirements for upper division transfers, different rating components are required. The First Time Freshman components are not used. The ***GOODS*** and ***TRGPA*** components from Lower division Transfer are used, and the following additional components are required:

Rating Component	Description
CGPSC	College GPA Score
GECT	General Ed Requirement – Critical Thinking
GEEC	General Ed Requirement – English Composition
GEM	General Ed Requirement – Mathematics
GEOC	General Ed Requirement – Oral Communication
GESC	General Ed Requirement - Score

1.1.2   Recommendations

Rating components are required to define rating schemes and **must** be setup for all rating schemes the campus plans to implement.

1.2   Rating Scheme Table

Navigation: **Home→ Design Student Administration → Design Admissions → Setup → Rating Tables → Rating Scheme Table**

The following rating types are supported by Baseline:

Rating Scheme	Description
FTF03	First Time Freshman, California Resident
FTFNR03	First Time Freshman, Non-Resident
LDT03	Lower Division Transfer, California Resident
LDTNR03	Lower Division Transfer, Non-Resident
UDT03	Upper Division Transfer, California Resident
UDTNR03	Upper Division Transfer, Non-Resident

Note that the **rating scheme codes must conform** to those listed above. However, these descriptions can be changed by the campus to conform to local terminology.

The following screen shot shows how the first page of the Rating Tables component should be completed.

1.2.1   Considerations

Effective Date: Enter the effective date for this rating scheme.

Status: The status should be *Active*.

Rating Type: Since CSU plans to evaluate applicants using automated processes, you must define a rating scheme with an **Overall rating type**.

Description: Enter a description for this rating scheme.

Short Description: Enter the short description

Instructions: This space is often used for other types of evaluations than the CSU automated evaluations; e.g. for admission committees. This space can be used to describe the admission policy being used.

Extracts: Clicking on the *Extracts* pushbutton brings up the *Materials Extract Detail* page.

The following page depicts how this page should be set up.

1.2.2   Recommendations

The Rating Scheme Table is required setup for each of the evaluation types your campus plans to implement.

1.3   Rating Components Table

Navigation: **Home→ Develop Enrollment → Design Admissions → Setup → Rating Table → Rating Components Table**

Rating components need to be set up for each of the rating schemes defined.

1.3.1   Considerations

You must have completed the Rating Scheme Table page prior to selecting rating components. The charts below outline how the rating component should be setup.

First Time Freshmen

Rating Component	Type	Processing Order	Final Value	Required	Calculation Method	Formula ID
ACT	Individual	1	No	No	Automatic	ADHGHACT
SAT	Individual	2	No	No	Automatic	ADHGHSAT
HSGPA	Individual	3	No	No	Automatic	ADACADEM
ARTS	Individual	4	No	No	Automatic	ADCURR9
ELECT	Individual	5	No	No	Automatic	ADCURR2
ENGLS	Individual	6	No	No	Automatic	ADCURR3
MATH	Individual	7	No	No	Automatic	ADCURR5
SCINC	Individual	8	No	No	Automatic	ADCURR6

Rating Component	Type	Processing Order	Final Value	Required	Calculation Method	Formula ID
SOCS	Individual	9	No	No	Automatic	ADCURR7
LANG	Individual	10	No	No	Automatic	ADCURR8
ELGID	Individual	12	No	No	Automatic	ADOVER1
SUBJT	Individual	13	No	No	Automatic	ADOVER2
TSUBJ	Individual	14	No	No	Automatic	ADOVER3
INDEX	Individual	15	No	Yes	Automatic	ADACAD1
OVER	Individual	16	Yes	Yes	Automatic	ADOVERAL

Lower Division Transfer

Rating Component	Type	Processing Order	Final Value	Required	Calculation Method	Formula ID
ACT	Individual	1	No	No	Automatic	ADHGHACT
SAT	Individual	2	No	No	Automatic	ADHGHSAT
HSGPA	Individual	3	No	No	Automatic	ADACADEM
ARTS	Individual	4	No	No	Automatic	ADCURR9
ELECT	Individual	5	No	No	Automatic	ADCURR2
ENGLS	Individual	6	No	No	Automatic	ADCURR3
MATH	Individual	7	No	No	Automatic	ADCURR5
SCINC	Individual	8	No	No	Automatic	ADCURR6
SOCS	Individual	9	No	No	Automatic	ADCURR7
LANG	Individual	10	No	No	Automatic	ADCURR8
ELGID	Individual	12	No	No	Automatic	ADOVER1
SUBJT	Individual	13	No	No	Automatic	ADOVER4
TSUBJ	Individual	14	No	No	Automatic	ADOVER5
INDEX	Individual	15	No	Yes	Automatic	ADACAD1
GOODS	Individual	16	No	Yes	Automatic	==ADOVER3==
GPSC	Individual	17	No	Yes	Automatic	==ADOVER4==
OVER	Individual	16	Yes	Yes	Automatic	ADOVERAL

Upper Division Transfer

Rating Component	Type	Processing Order	Final Value	Required	Calculation Method	Formula ID
TRGPA	Individual	1	No	No	Automatic	==TRGPA==
GECT	Individual	2	No	No	Automatic	==GECT==

Rating Component	Type	Processing Order	Final Value	Required	Calculation Method	Formula ID
GEEC	Individual	3	No	No	Automatic	GEEC
GEM	Individual	4	No	No	Automatic	GEM
GEOC	Individual	5	No	No	Automatic	GEOC
GESC	Individual	6	No	No	Automatic	GESC
GOODS	Individual	7	No	Yes	Automatic	ADOVER3
GPSC	Individual	8	No	Yes	Automatic	ADOVER4
OVER	Individual	9	Yes	Yes	Automatic	ADOVERAL

1.3.2   Recommendations

The Rating Component Table requires setup for each component within each Rating Scheme that you will be using. The same components need to be set up for both Resident and Non Resident students. The functional setup above represents the CSU minimum requirements for FTF, LDT & UDT. Campuses may have additional requirements for impacted programs.

1.4   Evaluation Codes

Navigation: Home→ Design Student Administration → Design Admissions → Setup→ Evaluation Tables → Evaluation Table

You will need to setup an Evaluation Code for the various evaluation types your campus uses. Use the Evaluation Table page to define evaluation codes and the rating schemes linked to them. You must assign evaluation codes—either manually or automatically—to applicants during the evaluation process.

1.4.1   Considerations

Evaluation Type: Select an evaluation type for this evaluation code. You can define evaluation codes that can be used for evaluating applicants (Application), or you can define evaluation codes that can be used for evaluating individuals (General). In the latter case, the evaluation code will be assigned to a person, rather than an application. The delivered CMS Baseline automated evaluations process uses the *Application* evaluation type.

Committee Rating ID: If committees perform this evaluation, select the rating scheme that the committee will use with this evaluation code.

Overall Rating ID: Assign an overall rating scheme if you use this rating code for overall evaluations.

The table below depicts how the Evaluation Table page should be set up for each evaluation code:

Evaluation Code	Description	Evaluation Type	Overall Rating ID
FTF03	First Time Freshman	Application	FTF03
FTFNR03	First Time Freshman, Non Resident	Application	FTFNR03
LDT03	Lower Division Transfer	Application	LDT03
LDTNR03	Lower Division Transfer Non Resident	Application	LDTNR03
UDT03	Upper Division Transfer	Application	UDT03
UDTNR03	Upper Division Transfer, Non Resident	Application	UDTNR03

1.4.2   Recommendations

The Evaluation Committee Table does not need to be set up at this time.

1.5   Evaluation Status Codes

Navigation: Home→ Design Student Administration → Design Admissions → Setup→ Evaluation Status Table

The following chart outlines the evaluation statues code that should be setup:

Evaluation Status	Status	Description	Short Description	Evaluation in Progress
CO	Active	Completed	Completed	No
IP	Active	In Progress	InProgress	Yes
PS	Active	Application Status Update Post	Posted	No

1.5.1   Considerations

Use the Evaluation Status Table page to define evaluation status codes. For example, you can set up statuses such as In Progress, Completed and Application Status Update Post. Later, when evaluating applicants, you will enter these statuses on evaluation pages as well as on the Application Program Data page under the Application Maintenance menu.

1.6   External Summary Type Table

Navigation: **Home→ Design Student Administration → Design Admissions → Setup→ External Summary Type Table**

The following External Summary Type must be setup for **First Time Freshman**:

The following External Summary Type must be setup for **Lower Division Transfers & Upper Division Transfers**:

1.6.1   Considerations

Use the External Summary Type Table page to define the types of summary education information that you want to capture from a prospect or applicant.

1.6.2   Recommendations

The setup shown above for this table is required.

1.7   GPA Type Table

Navigation: <u>Home</u>→ <u>Design Student Administration</u> → <u>Design Admissions</u> → <u>Setup</u>→ <u>GPA</u>
<u>Type Table</u>

The following GPA TYPE must be setup **First Time Freshman**:

The following GPA TYPE must be setup for **Lower Division Transfer and Upper Division Transfer**:

1.7.1   Considerations

Use GPA Type Table page to set up grade point average types for external organizations.

External GPA: Enter the external GPA value for each GPA value.

1.7.2   Recommendations

The setup shown above for this table is required.

1.8   Evaluation Code Assignment

**Navigation: Home→ CSU SA Baseline → CSU Admissions → Setup→ Evaluation Code
                Assignment**

This page is used to set up assignment rules for the *CSU Eval Code Assignment* process. Use this page to
set up the criteria for assigning different evaluation codes to different groups of students.

1.8.1   Considerations

Acad Career: Select the career of the applicants to be selected.

Term: Select the career of the applicants to be selected.

Evaluation Code: Select the evaluation code to assign to the selected applicants. This is a required field.

Admit Type: Click the hyperlink and select the admit type(s) of the applicants to be selected. Multiple
rows of admit types can be inserted, if appropriate.

Residency: Click the hyperlink and select the residency(s) of the applicants to be selected. Multiple rows of residency codes can be inserted, if appropriate.

Academic Level: Click the hyperlink and select the academic level(s) of the applicants to be selected. Multiple rows of academic level can be inserted, if appropriate.

Service Indicator: Click the hyperlink and select the service indicators(s) to indicate applications that should not be assigned evaluation codes. Multiple rows of service indicators can be inserted, if appropriate. The service indicator indication may be used to prevent evaluation of applicants who have not paid an application fee to the University, as identified in the *CSU Requiring Application Fees* Process. This field is optional.

Ready for Processing: Use this hyperlink to indicate if the Ready For Processing flag on the ERS Sub Page **must be checked** before an evaluation code can be assigned. Some campuses use this as an indicator that the application has been reviewed by an evaluator and is ready for consideration. This field is optional.

Academic Program and Academic Plan: Select the academic programs and plans of the applicants to be selected. You may insert rows and select multiple Academic programs and plans. This field is optional.

1.8.2   Recommendations

Map out all the criteria for each evaluation codes before setting up this page. This process will help eliminate possible setup errors.

1.9   CSU ERS Auto Admit

Navigation: Home→ CSU SA Baseline → CSU Admissions → Setup→ CSU ERS Auto Admit

The CSU ERS Auto Admit setup page works with the *CSU Eval Program Status Update* process. The *CSU Eval Program Status Update* process posts the results of an auto evaluation to the student's application record by inserting a new program action value, such as ADMT, DENY, MATR, or other program actions defined by the campus business processes.

An optional feature of the *CSU Eval Program Status Update* process allows you to update the ERS values for Student Standing and Basis of Admission for the admitted applicant at the time the admission decision is recorded.

If using this feature, the CSU ERS Auto Admit page needs to be set up for each evaluation code with the corresponding student standing and basis of admissions codes. The *CSU Eval Program Status Update* process will populate the Basis of Admission field and Student Standing field with the values indicated in the setup.

Home > CSU SA Baseline > CSU Admissions > Setup > **CSU ERS Auto Admit**   New Window

CSU ERS Auto Admit

CSU ERS Auto Admit

Academic Institution: CSUNR   Test University

Evaluation Code: FTF03   First time freshmen

View All   First ◂ 1 of 1 ▸ Last

*Basis of Admission Code: A   RESIDENT FTF

Academic Career: Undergrad ▾   **Student Standing Code:** 0 ▾

*Admit Term: 2047   PB/UG;Other

Begin Date: 08/08/2004   ☐ **Include in Offer**

End Date: ☐ **Include in Transcript**

1.9.1   Considerations

Basis of Admission Code: Select the Basis of Admission code for this evaluation type. A list of these codes is included in the Data Element Dictionary (DED) section of the *Enrollment Reporting System Operations Manual.*

Academic Career: Indicate the career associated with this evaluation type.

Admit Term: Indicate the term. The same evaluation code may be used for more than one term, but a row must be added for each term.

Begin Date: The default for the begin date is the system date.

End Date: Enter the date that you want this basis admission to be no longer valid. If you run the offer letter or transcript after this date it will not appear even if you have selected the **Include in Offer** check box.

Include in Offer: Select this check box to include the code, description, short description, and long description on the applicant's admission offer letter.

Include In Transcript: Select this check box to include the code and long description on the student's transcript.

Student Standing Code: Select the Student Standing code for this evaluation type. A list of these codes is included in the Data Element Dictionary (DED) section of the *Enrollment Reporting System Operations Manual.*

1.9.2   Recommendations

Use of this feature can significantly reduce manual data entry and errors.