



Document Information	
Title	Tracking Education Information for Applicants
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REVISION CONTROL

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Business Process Overview

You can use the Education pages to enter and update academic information from external sources such as transcripts for prospects and applicants. You may record general and specific external education data. Information you may record includes schools attended, academic summaries, subjects, degrees, courses, dates of attendance, and so forth. Since education information is stored about a *person*, it can be considered later when evaluating any application for this person.

The education data that you record for the individual will help you to determine how many courses that the prospect / applicant took at other schools are transferable to your institution.

A lot of the fields in the Education pages are optional to track. Only track the fields that you will be using to make an admission decision or to evaluate transfer credit work.

Business Process Workflow Diagram

None necessary

Process Prerequisites/Assumptions

Prerequisite/Assumption	Detail
Search / Match	Search / Match process for the applicant has been performed to verify that the applicant is currently in the PeopleSoft system.

1.0 Tracking Education Data for a Applicant

The following pages are used to accomplish the process outlined in Business Process Overview section.

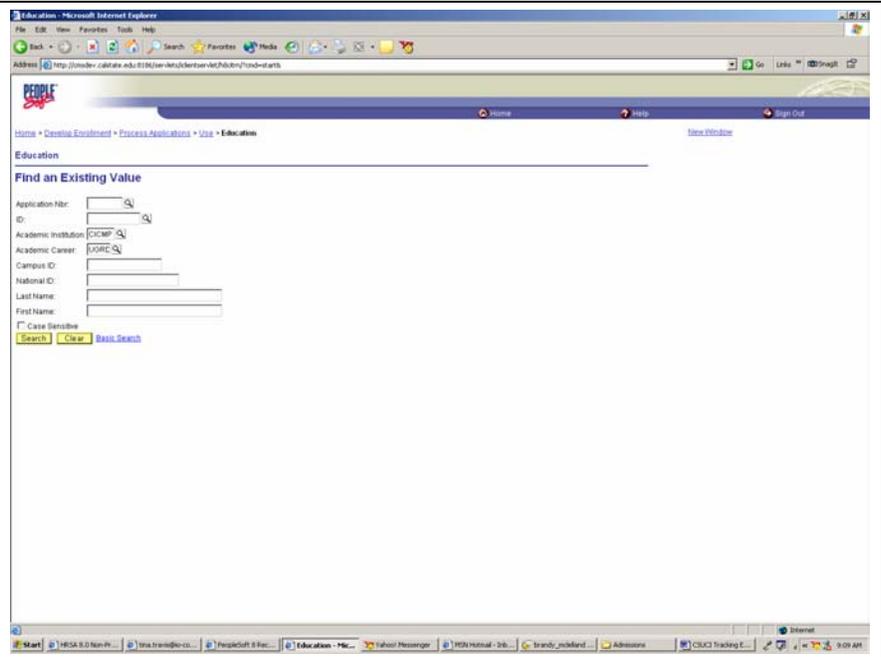
- External Data Page
- External Academic Summary
- External Subjects
- External Degree
- External Courses

1.1 External Data Page

Navigation

Home > Develop Enrollment > Process Applications > Use > Education > Find an Existing Value

Page Description

Find an Existing Value – Education	
	<p>Required Fields:</p> <ul style="list-style-type: none">IDAcademic InstitutionAcademic Career <p>Optional Fields:</p> <ul style="list-style-type: none">Campus IDNational IDLast NameFirst Name

Steps for Processing Data

1. Complete the required fields by typing in the applicant's ID, academic institution, and academic career information.
2. If you do not have the ID for the applicant, you can conduct a last name and first name search here.
3. Click the "Search" button to bring up the External Data Page.

Page Field Definition Summary

Field	Field Definition	Valid Values
ID	This is the system assigned ID of the individual	
Academic Institution	The institution's ID	CICMP
Academic Career	Grouping of all academic work for a student	Click on the "Magnifying or Look-up button" for valid values.

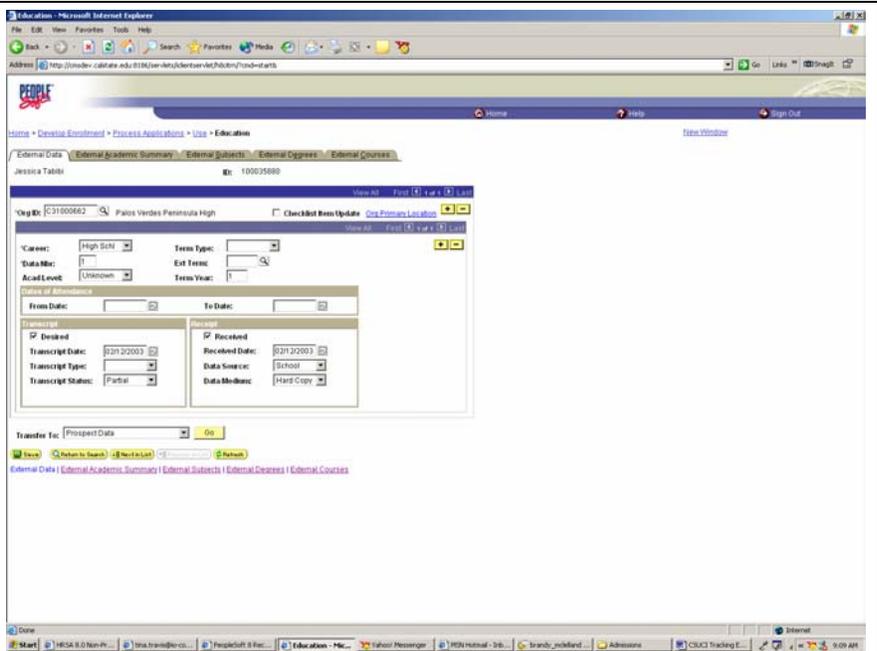
1.2 External Data Page

Navigation

Home > Develop Enrollment > Process Applications > Use > Education > External Data

Page Description

Use the External Data page to record schools an applicant has attended and related general education information. This may be information reported on a transcript, self-reported or reported from another source.

	<p>Required Fields:</p> <ul style="list-style-type: none"> Org ID Career Data Nbr <p>Optional Fields:</p> <ul style="list-style-type: none"> Those not required.
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Steps for Processing Data

1. Complete the information that you want to track for the applicant.
2. Select the school (Organization ID) to which this external data is related. The system automatically populates this field from the Prospect School/Recruiting page or the Application School/Recruiting page if a value was entered in the Last School Attended field on either of those pages **when the prospect record or application was initially added to the database.**

3. Select the Checklist Item Update box to indicate that the checklist related to this row of external data (or transcript) is updated when the Checklist Item Update Automated process is run. Select this option if you have received the requested transcript and after you have checked the “Received Transcript check box” at the bottom of the page (in the Receipt group box).
4. Select the external career for the external data that you are recording.
5. Select the term type used by the external organization.
6. The system will populate the data number field automatically. The first data item (or row) you enter is 1. The system numbers the subsequent rows sequentially (2, 3, and so on). If you make a change to the Data Nbr field on this page, click the Save button prior to prompting on the Data Nbr field in any of the other pages in the Education component.
7. Select the external term to which this data relates. For example, if this is a Fall transcript, select FALL in the Ext Term field.
8. Enter the academic level of the person at the time this data was collected or issued. This level might be different from the person's current level. Enter the appropriate term year pertinent to this external data entry.
9. Enter the dates that the person attended this school.
10. Select this “Desired check box” if you are entering data for a transcript that you will be requesting from the applicant. This will make the remaining fields in the Transcript group box become active.
11. Enter the date that the transcript was issued and select a transcript type.
12. Select the “Received check box” if the data you are entering is for a transcript you have received. This will make the remaining fields in the Receipt group box become active.
13. Enter the date that your office received the transcript and the data source for this transcript.
14. Select the format by which you received the transcript.
15. Insert rows for each external organization’s education data that you want to track for the applicant.
16. Click to the next page when you have completed all the information that you want to track.

Page Field Definition Summary

Field	Field Definition	Valid Values
Org ID	The school to which this external data is related. The system automatically populates this field from the Prospect School/Recruiting page or the Application School/Recruiting page if a value was entered in the Last School Attended field on either of those pages when the prospect record or application was initially added to the database.	Click on the “Magnifying or Look-up button” for valid values.
Checklist Item Update	If selected, this check box indicates that the checklist related to this row of external data (or transcript) is updated when the Checklist Item Update	Yes/No Check box

	Automated process is run.	
Career	The external career for the external data that you are recording.	Click on the drop down arrow for valid values.
Term Type	The term type used by the external organization.	none, Full Year, Miniterm, Other, Quarter, Quinmester, Semester, Trimester, and Unknown.
Data Nbr	The system populates this field automatically. The first data item (or row) you enter is 1. The system numbers the subsequent rows sequentially (2, 3, and so on).	
Ext Term	The external term to which this data relates	Click on the "Magnifying or Look-up button" for valid values.
Acad Level	The academic level of the person at the time this data was collected or issued	Click on the drop down arrow for valid values.
Term Year	The term year pertinent to this external data entry	Free numerical field
From Date / To Date	The dates that the person attended this school (external organization)	MM/DD/YYYY
Desired	If selected, you are requesting a transcript for the data that you are entering.	Yes/No Check box
Transcript Date	The date that the transcript was requested.	MM/DD/YYYY
Transcript Type	The transcript type.	Click on the drop down arrow for valid values.
Transcript Status	The status of the transcript status.	Click on the drop down arrow for valid values.
Received	If selected, this means that you have received a transcript for the data you are entering.	Yes/No Check box
Received Date	The date that your office received the transcript.	MM/DD/YYYY
Data Source	The data source for this transcript.	Click on the drop down arrow for valid values.
Data Medium	The format by which you received the transcript.	Click on the drop down arrow for valid values.

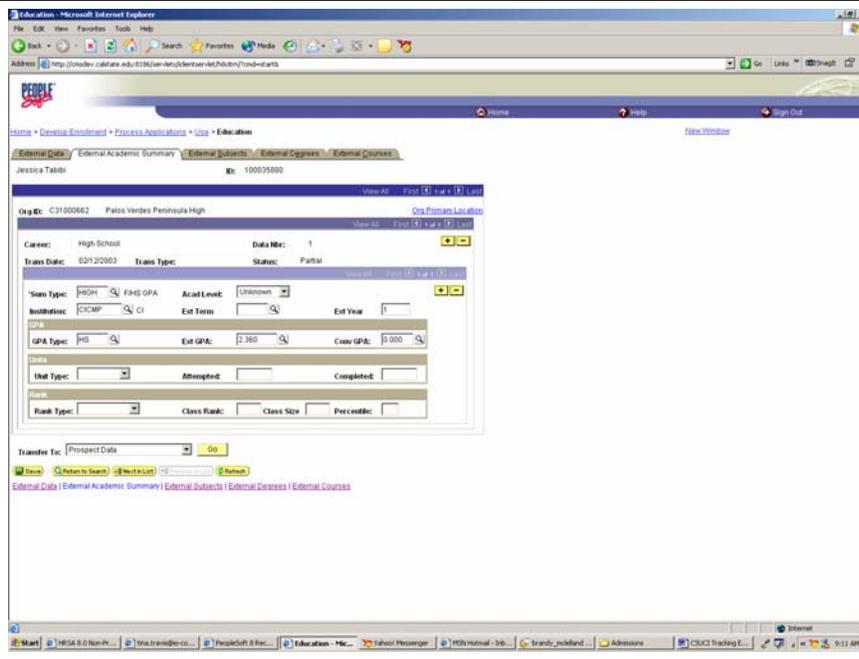
1.3 External Academic Summary Page

Navigation

Home > Develop Enrollment > Process Applications > Use > Education > External Academic Summary

Page Description

After you have entered the high level education data on the External Data page, you can record summary information about this piece of external education data on the External Academic Summary page. You can record GPA, units and rank details for this data. This may be information reported on a transcript, self-reported or reported from another source.



Required Fields:

Sum Type

Optional Fields:

Those not required.

Steps for Processing Data

17. Complete any of the summary information such as GPA, units, and rank details for the applicant.
18. Select the summary type for this external data. For example, this could be an overall summary of an entire high school transcript, or a summary of the 12th grade only.
19. Click on the “Magnifying” button to select your academic institution ID – SOCMP or MACMP.
20. Select the external term and year regarding this summary.
21. Select the GPA type used by the school from which the information was received. For example, they can use a 4 point scale or a 100 point scale.
22. Enter the external GPA from the reported information. If you have defined external GPA values for this GPA type, you can prompt for those values here. Otherwise, you can type in the appropriate numeric GPA value.
23. When you either navigate to a new page or press the Refresh button, the system automatically converts the GPA if you have defined GPA conversion rules. If you have not specified GPA conversion rules, the GPA that you enter in the External GPA field is copied into the Conv GPA field. The system converts the GPA when you click the Refresh button or when you navigate out of this page.
24. Select the unit type used by the school on this transcript or reported information. Values for this field are delivered with your system as translate values. Enter the number of units attempted by the person for this summary.

25. Enter the number of units completed at the time this summary transcript or reported information was recorded.
26. Select the rank type.
27. Enter the person's rank in their class and the size of the class.
28. When you either navigate to a new page or press the Refresh button, the system automatically calculates the percentile.
29. Click to the next page when you have completed all the information that you want to track.

Page Field Definition Summary

Field	Field Definition	Valid Values
Sum Type	The summary type for this external data.	Click on the "Magnifying or Look-up button" for valid values.
Acad Level	The academic level of the person at the time this piece of information was current, which might not be the person's current academic level.	Click on the drop down arrow for valid values.
Institution	ID of your academic institution	SOCMP or MACMP
Ext Term / Year	The external term and year regarding this summary.	Click on the "Magnifying or Look-up button" for valid values.
GPA Type	The GPA type used by the school from which the information was received.	Click on the "Magnifying or Look-up button" for valid values.
Ext GPA	The external GPA from the reported information.	Click on the "Magnifying or Look-up button" for valid values.
Conv GPA	The converted GPA. We did not set up any GPA conversion rules.	Click on the "Magnifying or Look-up button" for valid values.
Unit Type	The unit type used by the school on this transcript or reported information.	Click on the drop down arrow for valid values.
Attempted	The number of units attempted by the person for this summary	
Completed	The number of units completed at the time this summary transcript or reported information was recorded	
Rank Type	The rank type	Unweighted, Weighted
Rank / Size	The person's rank in his/her class and the size of the class	
Percentile	The percentile based on the rank and size of the class	

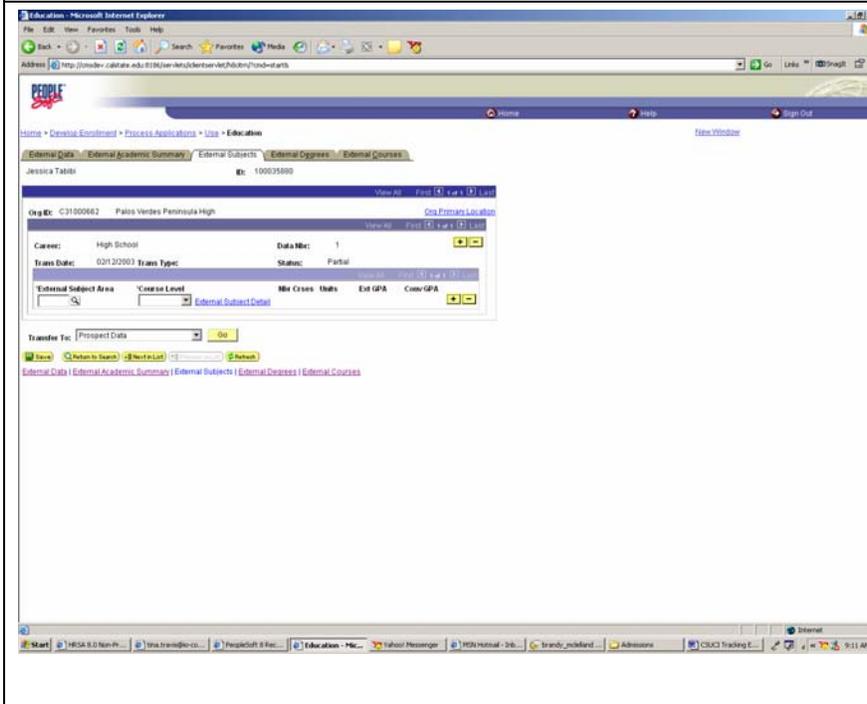
1.4 External Subjects Page

Navigation

Home > Develop Enrollment > Process Applications > Use > Education > External Subjects

Page Description

After you have entered the high level education data on the External Data page, you can record external subjects taken at a school by an applicant on the External Subjects page. This may be information reported on a transcript, self-reported or reported from another source. Storing this data is useful for grouping subjects. For example, perhaps your office tracks the subject area requirements but does not want to enter in or load all of the external courses a student has taken.



Required Fields:

Optional Fields:

Steps for Processing Data

30. Complete all the external subjects that you want to track at the applicant level.
31. Insert rows for additional subjects.
32. Click on the External Subject Details link record the number of courses, units, external GPA, and converted GPA details about the external subject areas.
33. Click to the next page when you have completed all the information that you want to track.

Page Field Definition Summary

Field	Field Definition	Valid Values
External Subject Areas	The external subject area	Click on the "Magnifying or Look-up button" for valid values.
Course Level	The course level taken in this subject area.	Click on the drop down arrow for valid values.
Nbr Courses	This value populates from the External Subject Detail page.	
Units	This value populates from the	

	External Subject Detail page.	
Ext GPA	This value populates from the External Subject Detail page.	
Conv GPA	This value populates from the External Subject Detail page.	

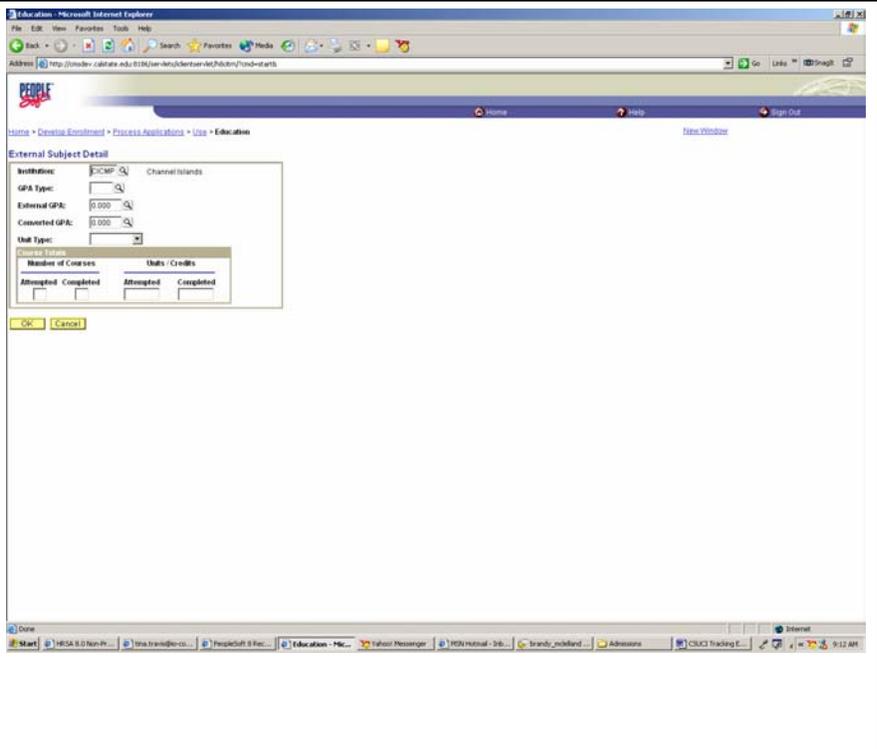
1.5 External Subjects Detail Page

Navigation

Home > Develop Enrollment > Process Applications > Use > Education > External Subjects. Click on the External Subjects Detail Link.

Page Description

Use this External Subjects Detail page to record course level, number of courses, units, external GPA, and converted GPA details about external subject areas for an applicant.

	<p>Required Fields:</p> <p>Optional Fields:</p>
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Steps for Processing Data

34. Select your academic institution – SOCMP or MACMP.
35. Record the number of courses, units, external GPA, and converted GPA details for each external subject areas.
36. For each external subject, you need to click on the External Subject Details link if you want to track this information at the applicant level.
37. **Click OK** to save the entries on this detail page.

38. Click to the next page when you have completed all the information that you want to track.

Page Field Definition Summary

Field	Field Definition	Valid Values
Institution	ID of your academic institution.	SOCMP or MACMP
GPA Type	The GPA type for the school the person attended	Click on the “Magnifying or Look-up button” for valid values.
External GPA	The external GPA earned by the applicant for this subject	Click on the “Magnifying or Look-up button” for valid values.
Converted GPA	The converted GPA. We did not set up any GPA conversion rules.	Click on the “Magnifying or Look-up button” for valid values.
Unit Type	The unit type	Click on the drop down arrow for valid values.
Number of Courses, Attempted, and Completed	The number of courses the person attempted and completed	Numerical Value
Units/Credits, Attempted, and Completed	The number of units or credits the person attempted and completed	Numerical Value

1.6 External Degree Page

Navigation

Home > Develop Enrollment > Process Applications > Use > Education > External Degree

Page Description

Use the External Degree page to enter information about a applicant's degrees—either those that have been received or those that are still in progress. Fields of study, honors, and degree status are examples of information you might want to record.

The screenshot shows a web browser window displaying a form for entering external degree information. The form is titled 'External Degree' and is part of a larger system. The form includes the following fields and values:

- Org ID: C2100062
- Degree Nbr: 1
- Degree Date: 7/1/2001
- Data Source: School
- Degree: Santa Rosa High
- Honors Category: None
- Degree Status: Complete
- External Subject 1: Field of Study 1
- External Subject 2: Field of Study 2
- External Career: Santa Rosa High
- Data Nbr: 1

Required Fields:

- Degree Nbr
- Degree Date
- Data Source
- Degree
- Honors Category
- Degree Status

Optional Fields:

Steps for Processing Data

39. Complete all required fields that you would like to track for the applicant.
40. The system populates the degree number field automatically. The first data item (or row) you enter is 1. The system numbers the subsequent rows sequentially (2, 3, and so on).
41. Enter the date this degree was or will be granted by the external organization (next to the Org ID). In the example shown, Santa Rosa High granted the applicant a high school diploma on July, 1, 2001.
42. Enter the data source for this degree information. Values for this field are delivered with your system as translate values.
43. Select the external degree that the person received or that is still in progress. The system populates the description automatically. If you want to enter a degree that has not been defined, leave the Degree field blank, and type in the appropriate information in the description field to the right of the Degree field.
44. Select an honors category if the person received an honor for this degree. Values for this field are delivered with your system as translate values.
45. Select the degree status. Values for this field are delivered with your system as translate values.
46. Select an external subject or field of study if the person had a subject or field of study concentration for this degree. To enter an external subject area not defined in your system, leave the field blank and tab to the related description field and enter any text desired.
47. Select the person's external career for this degree. Values for this field are delivered with your system as translate values.
48. If this degree information is related to a particular transcript or source of information, enter the data number of the transcript or other source. This field populates from the External Data page. You cannot link to a newly entered data number until the External Data page has been saved.

49. Click to the next page when you have completed all the information that you want to track.

Page Field Definition Summary

Field	Field Definition	Valid Values
Degree Nbr	The system populates this field automatically. The first data item (or row) you enter is 1. The system numbers the subsequent rows sequentially (2, 3, and so on).	
Degree Date	The date this degree was or will be granted.	MM/DD/YYYY
Data Source	The data source for this degree information.	Click on the drop down arrow for valid values.
Degree	The external degree that the person received or that is still in progress.	Click on the "Magnifying or Look-up button" for valid values.
Degree Description	The system populates the description automatically. If you are tracking a degree is not defined, leave this field blank, and type in the appropriate information in the description field to the right of the degree field.	
Honors Category	An honors category if the person received an honor for this degree	Click on the drop down arrow for valid values.
Degree Status	Degree status	Click on the drop down arrow for valid values.
Ext Subj / Field of Study 1	An external subject or field of study if the person had a subject or field of study concentration for this degree. field and enter any text desired. To enter an external subject area not defined in your system, leave the field blank and tab to the related description field and enter any text desired.	Click on the "Magnifying or Look-up button" for valid values.
Ext Subj / Field of Study 2	An external subject or field of study if the person had a subject or field of study concentration for this degree. field and enter any text desired. To enter an external subject area not defined in your system, leave the field blank and tab to the related description field.	Click on the "Magnifying or Look-up button" for valid values.
External Career	The person's external career for this degree.	Click on the drop down arrow for valid values.
Data Nbr	The data number of the transcript or other source	Click on the "Magnifying or Look-up button" for valid values.

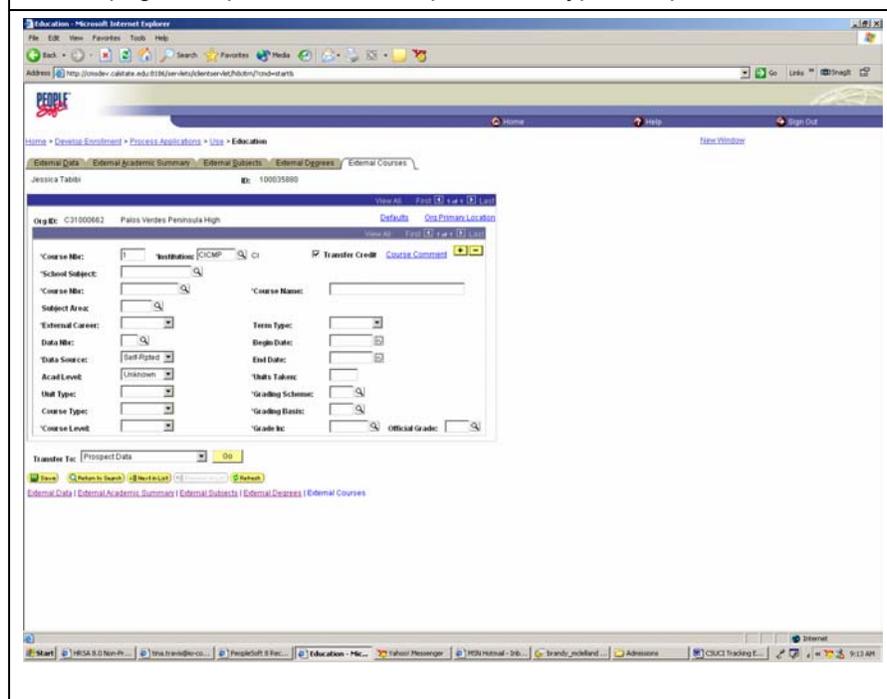
1.7 External Courses Page

Navigation

Home > Develop Enrollment > Process Applications > Use > Education > External Courses

Page Description

Use the External Courses page to enter detailed course information for the applicant. These might be courses reported on a transcript, self-reported, or reported from another source. Or, you can link courses on this page to a particular transcript or other type of reported information from the External Data page.

	<p>Required Fields:</p> <ul style="list-style-type: none">Course NbrInstitutionSchool SubjectCourse NbrExternal CareerData SourceCourse LevelUnits TakenGrading SchemeGrading BasisGrd In / Official <p>Optional Fields:</p> <p>Those not required.</p>
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Steps for Processing Data

50. This page needs to be completed if you are automatically evaluating transfer credit work.
51. Track as many detailed course data as needed for the applicant.
52. If you have more than one course to enter, click the Defaults link to enter information common to each course. This will save you data entry time.
53. To enter a group of courses with different default information for this same school and person, save the page, then click the Defaults button to return to the External Course Defaults page and enter new default information.
54. The system populates this field automatically. The first data item (or row) you enter is 1. The system numbers the subsequent rows sequentially (2, 3, and so on).
55. The code for your academic institution appears.
56. Select this check box if you want the system to consider the external course information to be transfer credit. The system includes this course in its transfer credit process.

57. Select the subject of the course you are entering. If you have a course catalog for this school set up in the system, you can prompt for valid values on this field. If a course catalog does not exist for this school, type in the subject.
58. Select the school course number of this course. If a course catalog has been set up for this school, you can prompt for valid values on this field. If a course catalog does not exist for this school, type in the course number. The description of the course displays if linked to a course catalog. If the course catalog is not linked, type in the description of this course.
59. Select the external subject area to which this course belongs. Subject areas are a way of identifying common subjects with different titles. For example, similar subjects offered at external schools could have diverse titles such as "Creative Writing," "Writing Fiction," and "Free Writing." You can link a common external subject area you define as "Writing," to all of these subjects.
60. The external career populates automatically from the School Data page for this organization. Edit the field if necessary.
61. If this course information is linked to a row of data, such as a transcript on the External Data page, enter the data number from that page. When you tab out of this field, the remaining fields populate automatically from the data linked to this data number. If the courses you are entering are not linked to a data number, skip this field and complete the remaining fields.
62. The newly entered data number values are not available until they have been saved on the External Data page.
63. Select the data source for this course information. Values for this field are delivered with your system as translate values..
64. Select the person's academic level at the time these courses were taken. Values for this field are delivered with your system as translate values.
65. Select the unit type for these courses. Values for this field are delivered with your system as translate values.
66. Select the course type defining this course. Values for this field are delivered with your system as translate values.
67. Select the course level of this course. Values for this field are delivered with your system as translate values.
68. Select the term type used by the school where these courses were taken. Values for this field are delivered with your system as translate values. Depending on the term type entered, you must either fill in a begin date and end date or an external term and term year.
69. Select the external term in which these courses were taken.
70. Enter the term year during which these courses were taken.
71. Enter the number of units taken for this course.
72. Select the grading scheme you want to use to convert the external school's grading scheme to your standards.
73. Select a grading basis for the grading scheme. The values available depend on what grading scheme you enter.
74. Select the grade the applicant earned in this course. The values available for this field are determined by the grading scheme. When you click the Refresh button or navigate out of this

page, the system converts the grade according to your grading scheme definition and displays in the field to the right of the Grd In/Official field.

75. Insert rows for each course that you are tracking.

76. **SAVE** when you have completed recording all the relevant courses for the applicant.

Page Field Definition Summary

Field	Field Definition	Valid Values
Course Nbr	The system populates this field automatically. The first data item (or row) you enter is 1. The system numbers the subsequent rows sequentially (2, 3, and so on).	
Institution	ID of your institution	MACMP or SOCMP
Transfer Credit	If selected, you want the system to consider the external course information to be transfer credit. The system includes this course in its transfer credit process.	Yes/No Check Box
School Subject	The subject of the course you are entering. If you have a course catalog for this school set up in the system, you can prompt for valid values on this field. If a course catalog does not exist for this school, type in the subject.	Click on the “Magnifying or Look-up button” for valid values.
Course Nbr	The school course number of this course. If a course catalog has been set up for this school, you can prompt for valid values on this field. If a course catalog does not exist for this school, type in the course number. The description of the course displays if linked to a course catalog. If the course catalog is not linked, type in the description of this course.	Click on the “Magnifying or Look-up button” for valid values.
Subject Area	The external subject area to which this course belongs. Subject areas are a way of identifying common subjects with different titles.	Click on the “Magnifying or Look-up button” for valid values.
External Career	The external career populates automatically from the School Data page for this organization. Edit the field if necessary.	Click on the drop down arrow for valid values.
Data Nbr	If this course information is linked to a row of data, such as a transcript on the External Data page, enter the data number from that page. When you tab out of this field, the remaining fields populate automatically from the	Click on the “Magnifying or Look-up button” for valid values.

	data linked to this data number. If the courses you are entering are <i>not</i> linked to a data number, skip this field and complete the remaining fields.	
Data Source	The data source for this course information	Click on the drop down arrow for valid values.
Acad Level	The person's academic level at the time these courses were taken	Click on the drop down arrow for valid values.
Unit Type	The unit type for these courses.	Click on the drop down arrow for valid values.
Course Type	The course type defining this course.	Click on the drop down arrow for valid values.
Course Level	Select the course level of this course.	Click on the drop down arrow for valid values.
Term Type	The term type used by the school where these courses were taken. Depending on the term type entered, you must either fill in a begin date and end date or an external term and term year.	Click on the drop down arrow for valid values.
Begin Date	The begin date the courses were taken	MM/DD/YYYY
End Date	The date when course were taken ended	MM/DD/YYYY
Units Taken	The number of units taken for this course.	Numerical Value
Grading Scheme	The grading scheme you want to use to convert the external school's grading scheme to your standards.	Click on the "Magnifying or Look-up button" for valid values.
Grading Basis	The grading basis for the grading scheme. The values available depend on what grading scheme you enter.	Click on the "Magnifying or Look-up button" for valid values.
Grd In / Official	The grade the applicant earned in this course. The values available for this field are determined by the grading scheme.	Click on the "Magnifying or Look-up button" for valid values.