

# Manual Conversion of Legacy Records

**Purpose:** Comprehensive steps for manually converting student records that were not included in the conversion pool.

**Audience:** Advanced Records Staff.

## Identify Need

Students not part of your original conversion pool will return after time away. A student or another staff person may alert you that a returning student has records in legacy. Another source is the *NonConverted Student Records* QARS Report. This report identifies students who have enrollment in ctcLink and have transcript records, suppressed or unsuppressed, in Legacy. Monitor this report regularly.

If you review a record and determine you will not convert it, add Service Indicator S01 with Reason NRBLT. This will document that you have reviewed the record and will exclude it from your QARS Report.

## Establish EMPLID

- If an EMPLID exists, do not create a new one.
- If an EMPLID does not exist and time allows, have the student apply for admission. Process the application to create the EMPLID.
- If an EMPLID does not exist, and you cannot wait for the student to apply, use [Quick Admit](#) to create the EMPLID.

## Prepare Legacy Data

1. Review Legacy Record BioDemo for the following:
  - a. **DOB.** Legacy Transcripts will not allow users to send a transcript to ctcLink with a missing or invalid Date of Birth. If the student's date of birth is missing, it must be populated before the application allows you to send the transcript.
  - b. **SSN.** If *both* the SID and EMPLID have an SSN/TIN, and they do not match, Search/Match may not recognize them as the same person. Ideally, alert Support to avoid a duplicate being created. If ctcLink is missing the SSN, consider adding it to the ctcLink record to support Search/Match and to avoid unnecessarily sending the student a missing TIN/1098T letter.

- c. **Name.** If the *SID* and *EMPLID* names are vastly different (i.e., a reasonable person reviewing the two would assume they are not the same person), Search/Match may not recognize them as the same person. Alert Support to avoid a duplicate being created.
2. For your institution, add SID and, if applicable, SSN **External System ID** records.
3. Use the Legacy Transcript "Send Transcript to College" function to send the student's transcript to your institution.

## Receive Legacy Transcript

1. Confirm the transcript has arrived and the **External Education** page is populated. If you do not see it, remember to:
  - Allow processing time. Your next scheduled legacy outbound batch must complete, AND then the next scheduled inbound to ctcLink process must complete. This can take a few days.
  - Try searching by the legacy name and SSN before resending.
2. Compare Legacy Transcript to External Education Page. PeopleSoft blocks duplicate coursework, including repeats. Legacy does not send coursework marked for suppression. Add any missing coursework as needed.

**i** **QCS\_SR\_LEGACY\_REC\_MAN\_CNV\_TRNS:** Use this query to ensure the student's courses and attempts are present in External Education and posted under **Convert Legacy Coursework**.

## Prepare ctcLink Student Record

1. Create a **Student Program/Plan** specifically for the purpose of manual conversion. If a student earned at least one credential, assign a corresponding Program/Plan. If a student did not complete a credential, it does not matter what Program/Plan you use. Depending on your local business practice, you could assign a Program/Plan related to their legacy work or consider using NOAWS/NASOT. In either case, the effective date is the first day of the first Term of legacy enrollment. Use this Program/Plan for the remaining steps.

**i** **Advanced Users.** Yes, if a Program/Plan created with an ACTV row exists, you can use **Correct History** to backdate it to accommodate the records you are manually converting. Do not attempt this on a stack created by APPL.

2. Do not add a **Residency Determination** unless you need to add **Transcript Text** (e.g., Dean's List). If Transcript Text is required, add a residency determination on or before the first term of Legacy enrollment.

3. **Term Activate** the student for all the terms of legacy enrollment. If term activation already exists for any term, do not alter it.

**QCS\_SR\_PPS\_TERM\_EFFDT:** Use this query to convert YRQ to Term and determine your students' correct program plan dates. Alternatively, suppose you have a Service Indicator for manual conversions. In that case, your business process involves placing the S01 Service Indicator early in the process, or you have a local "in process" Service Indicator and Program Action Reasons, then the query **QCS\_SR\_LEGACY\_REC\_MAN\_CNV\_SUM** will provide you with valid ACTV and DISC dates that encompass your student's External Education coursework.

**QCS\_SR\_LEGACY\_REC\_MAN\_CNV\_SUM:** This query can guide a person through the entire conversion process. All that is required is a SI for "In Progress" to be set up to contain the word "Legacy," or you need to apply S01 early in the process, and a couple of program action reason codes to be configured. The Program Action Reason short description must fit the pattern %M%N%%COMP% to display as a manual completion Student Program Plan stack or %M%N%CONV% as the transcript conversion Student Program Plan stack.

## Convert Legacy Coursework

1. Use **Course Credits-Automated**.
2. Select the same Program as your Program/Plan Stack, External for Credit Source Type, and the External Organization ID of your school.
3. Create an Articulation Term row for **each** term of legacy enrollment.
4. Articulate coursework to the term earned. For each articulation term, select only that term's courses on External Education and click Fetch. Repeat until you have fetched all terms.
5. Change Grading Basis. Change to appropriate Grading Basis (GRD, SUS, PNP, etc.) with one exception: Leave Grading Basis TRN for any "I" grade that will not be lapsed.
6. Apply Repeat Codes per your college's business practice.

**Converting repeat records is up to your college's business practice. This may help you establish yours:**

- To afford all converted students the same benefits, apply REXP to all manually converted records.
- To reflect the legacy record, apply the appropriate Repeat Codes (RPIN/RPEX) based on "R" indicators in the legacy record.

- If you do not apply a Repeat Code to manually converted coursework, the Repeat Checking Process will evaluate it according to the settings of the Repeat Rule.
- **Transfer Credit Rules** streamline the credential evaluation process to reduce the turnaround time for evaluating college transcripts and posting transfer credit. Transfer credit rules tell PeopleSoft which courses are equivalent at your institution. Course Credits-Automated is the mechanism used to fetch courses from the External Education page, and with transfer credit rules in place, it minimizes keystrokes and saves time. **QCS\_SR\_LEGACY\_REC\_MAN\_CNV\_RULE** can help you find missing transfer rules that will make future conversions faster.

## Complete ctclink Student Record

1. Convert any **Transcript Text**.
2. Convert any **Academic Standing**.
3. Convert any transfer credits as you normally would, using **Course Credits-Manual** or **Course Credits-Automated**. *Is there a significant quantity of credit from a school in our system? If the transcript record is not already in External Education, consider reaching out to request a courtesy resend.*
4. Convert any **degrees and/or certificates**. Each credential needs its own Student Program/Plan Stack: Add additional stacks as needed.
5. If it is still open, **close the Program/Plan** you created by adding a DISC row effective-dated the day after the last day of the previous term of legacy enrollment.
6. Confirm conversion is complete and accurate. **Print your ctclink Transcript** and compare it to Legacy transcript.
7. Assign **Service Indicator** S01 with Reason Code RBLT. Doing so will record that you have reviewed the record and will suppress it from continuing to be included on your **QARS Report**.

**i** If you converted Legacy Enrollment for the term that you went live, notify your FA and Business Offices and advise them to review the record. *Your Business Office may need to create an offsetting Journal Entry. If they have questions, please have them submit a ticket to the **Student Financials Support Team**.*

## Manual Conversion Flowchart

[Printable View of the Manual Conversion Flowchart](#)

