

CS Core - Data Validation - Bio/Demo

i Purpose: This guide is intended to provide colleges instructions on how to perform the conversion validation of data in the PeopleSoft environment.

Colleges are being asked to review data that was converted from the legacy environment to PeopleSoft. The goal of data validation is to ensure legacy data was accurately converted into PeopleSoft. College Subject Matter Experts (SMEs) are included in data validation as a learning experience in navigating the PeopleSoft application, selecting records to review, and reporting issues discovered.

College executives are asked to support the time and effort expended by college SMEs necessary to complete the following:

- Develop a familiarity with navigating the relevant PeopleSoft menus and pages.
- Review selected records, comparing legacy data to the records as converted into PeopleSoft.
- Report issues discovered after careful review of converted data.
- Monitor resolution of reported issues for review in the next conversion testing round.
- Develop an approach for self-managing the data validation and issue reporting process in subsequent rounds of data conversion testing.

It is expected that College Data Validation SMEs will have already read the Data Validation Overview guides *before* beginning their validation activities:

- [Data Validation Overview - Getting Started](#)
- [Data Validation Overview - Reporting Issues](#)

Overview of Data Validation for Bio/Demo Data in Campus Solutions

Conversion Summary

Bio/Demo conversion testing includes the following areas:

- Student Bio/Demo Person Information - Minimum of 50-100 records
- Student Bio/Demo Citizenship
 - USA citizenship - Minimum of 50 records
 - Citizenship from supplemental file- Minimum of 50 records

- Birth Country and Location from supplemental file - Minimum of 50 records
- Student Bio/Demo Visa - Minimum of 50 records
- Student Bio/Demo Ethnicity - Minimum of 50 records
- Student Bio/Demo Disability and Accommodation (*Cycle 2 and after*) - Minimum of 50 records
- Residency (*Cycle 2 and after*) - Minimum of 50 records including a variety of Residency codes and Residency exceptions
- Emergency Contacts - Minimum of 50 records

Conversion Validation Due Date

The Validation Results and Feedback are due NO LATER THAN on the last day of the Data Validation Period. It is strongly recommended that issues are reported EARLY in the validation period and are not held until the end of the period. Validation Results and Feedback are for reporting closure of the college's validation activities for the conversion cycle. To view a list of the validation periods please refer to the [timeline topic in the Data Validation Overview - Getting Started Guide](#).

Getting Help

Questions regarding the data validation activities can be directed to the Functional Analyst or Campus Solutions Lead.

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Conversion Detail – Bio/Demo

Conversion Background – Student Bio/Demo - Person

Information

Bio/Demo - Conversion Legacy Source Details

PeopleSoft has been populated with 6 years of enrolled student information and student information based on admissions data for 2 years prior to go live and any future admit terms. The data was extracted via conversion activity referred to as C-014, and the chart below identifies the legacy data that will populate the specified PeopleSoft Bio/Demo fields.

PeopleSoft Field	PeopleSoft Field Description	Legacy Source System	Legacy Source Record	Legacy Extract Value /Source Field
EMPLID	Empl ID or ID	SM or TRAN	STU-D or TRAN-STU-D	SID
BIRTHDATE	Date of Birth	SM or TRAN	STU-D or TRAN-STU-D	BIRTH-DATE
NAME_TYPE	Type of Name	SM or TRAN	STU-D or TRAN-STU-D	Set as Primary
EFFDT	Effective Date	SM or TRAN	YRQ-M or TRAN-YRQ-D.YRQ	LAST-DAY-YRQ
EFF_STATUS	Status as of Effective Date	translation	n/a	A-active
NAME	Name	SM or TRAN	STU-D or TRAN-STU-D	STU-NAME
LAST_NAME	Last Name	SM or TRAN	STU-D or TRAN-STU-D	STU-NAME
FIRST_NAME	First Name	SM or TRAN	STU-D or TRAN-STU-D	STU-NAME
MIDDLE_NAME	Middle Name	SM or TRAN	STU-D or TRAN-STU-D	STU-NAME
ADDRESS_TYPE	Address Type	ppsft system	STU-D or TRAN-STU-D	Set as Primary

ADDRESS_TYPE	Address Type	SM	ALT-ADDR-M	Set as Other
EFFDT	Effective Date	SM or TRAN	YRQ-M or TRAN-YRQ-D.YRQ	LAST-DAY-YRQ
EFF_STATUS	Status as of Effective Date	translation	n/a	A-active
COUNTRY	Country	n/a		USA
ADDRESS1	Address Line 1	SM	STU-D or TRAN-STU-D and/or ALT-ADDR-M	STU-STREET
CITY	City	SM or TRAN	STU-D or TRAN-STU-D and/or ALT-ADDR-M	STU-CITY
STATE	State	translation	STU-D or TRAN-STU-D and/or ALT-ADDR-M	STU-ST
POSTAL	Postal Code	SM or TRAN	STU-D or TRAN-STU-D and/or ALT-ADDR-M	STU-ZIP
E_ADDR_TYPE	Email Type	translation		Set as Home
EMAIL_ADDR	Email Address	SM	ALT-ADDR-M	STU-EMAIL-ADDR
PHONE_TYPE	Phone Type	translation		Day for Home Evening for Mobile
PHONE	Telephone	SM	STU-D	STU-DAY-PHONE STU-EVE-PHONE
SEX	Sex	SM or TRAN	STU-D or TRAN-STU-D	SEX
COUNTRY	Country	ppsft system		USA
NATIONAL_ID_TYPE	National ID Type	ppsft system	SID-SSN-XREF-D.SSN	If SSN matches SSN format rules PR. If SSN matches ITIN rules ITIN

NATIONAL_ID	National ID	SM	SID-SSN-XREF-D	SSN
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A converting record that matches an existing PeopleSoft record can update the existing PeopleSoft record. Effective dated fields will have a new effective dated row added. Fields without effective dates may be overwritten based on the conversion priority logic identified below.

Bio/Demo - Conversion Priority Logic and Identifying Data Source

Priority Rules for Base Bio/Demo Record (Hub Data)

When reviewing Bio/Demo data it is important to have a basic understanding of the priority logic applied to the various systems that are contributing to the PeopleSoft record. There are five data sources for Personal Information.

1. Current PeopleSoft record
2. Legacy PPMS (Human Resources System) Active employees or employees who have separated within the last 2 years
3. Legacy FAM (Student Financial Aid Data) Students enrolled in the last 6 academic years
4. Legacy SMS (Student Data) Students enrolled in the last last 6 academic years
5. Legacy FMS (Student Financial data) Students with any account balance (bio/demo data is sourced from SMS)

If an active PeopleSoft record exists with active payroll, the PeopleSoft record will not be changed by a converting college. If a PeopleSoft student record exists with no active PeopleSoft employee data, but includes current student enrollment, then the record coming in from the converting college will be evaluated for active payroll at the converting college. If no active payroll data exists from the converting college, then the financial aid data will be compared. If the PeopleSoft record has a loaded ISIR for the go-live term, then the PeopleSoft bio/demo record will not be updated by incoming bio/demo information. If the PeopleSoft record does not have a loaded ISIR for the go-live term, then the PeopleSoft bio/demo record will be updated by incoming FAM data. If there is no incoming FAM data for that record, then the bio/demo record will be updated by the incoming SMS data.

When no existing PeopleSoft record is found, the incoming record will be based on data from the four legacy systems only. A student with an active employee record and active payroll will take priority during conversion. If no employee record exists, the student record is evaluated, pulling personal information first from FAM, then SMS, and finally FMS based on the most recent activity from each of these systems. If a student has a record at more than one converting college, and there was no FAM data converting from that college, then the college with the most recent enrollment will be the record that converts the personal information from the legacy system.

If a student is enrolled at two or more converting colleges during the go-live term, whichever college loads first will take priority.

Priority Rules for Bio/Demo Related Fields (Non-Hub Data)

PeopleSoft has a base biographical record with Name, Address, Phone Number, Email, Date of Birth and National ID. Other bio/demo related fields are called Non-Hub data and they include Citizenship, Birth Country, Visa/Permit, Disability and Emergency Contact. These records will convert using the same priority logic that is used for the main bio/demo record, except for the scenarios listed below.

- There is no Non-Hub data for FAM. If a student converted from FAM, the Non-Hub data will convert from the SMS Non-Hub data, if available.
- If there is an existing PeopleSoft record for a Non-Hub element and there is not a Non-Hub element being loaded by the incoming college, there will be no update to remove the existing data from PeopleSoft.
- If there is not an existing PeopleSoft record for a Non-Hub element, but if data comes in from more than one converting college, the Non-Hub data will only convert from the college that will also be updating the bio/demo record.

Source Tips and Clues

When validating data, it can be difficult to determine the source of the records. There are a few indicators that give clues as to the source of the data

1. If the PeopleSoft ID number starts with a 1, the source was from a converting college PPMS system or created in the PeopleSoft HCM pillar (human resources system).
2. Make sure to use "Include History" mode on pages, where available, and look for data with multiple rows. When you are in history mode you can look at the top right corner of the data box for a "View All" or "1 of 2" page viewer to review prior effective dated data. Fields with previous effective dated rows were existing in PeopleSoft and may or may not have been updated with converting data.
3. Data with an effective date of 01/02/1901 or later typically indicate a record that was existing in PeopleSoft and was updated by the conversion. More information about effective dating is provided below.
4. The External System ID page can tell you if the student has a legacy ID from other colleges. Unfortunately, this page does not provide information if the student was entered natively into PeopleSoft. The External System ID page can be found at Main > Campus Community > Personal Information > Identification > External System ID.

Search/Match

When searching for matching records in PeopleSoft, the system uses various data elements in combination to determine if the record is a match to an existing PeopleSoft person record. The following list contains the field combinations and order in which the system is searching for a matching record. If no match is found, based on these sets of parameters, a new Person ID is created for the incoming record.

1. External ID + First Name (first 3 characters)
2. National ID (SSN) + First Name (first 3 characters)
3. External ID + Birthdate

4. National ID (SSN) + Birthdate
5. Address + Last Name + Birthdate
6. Last Name + First Name + Birthdate
7. No Match Found

Effective Dating

For new records being created in PeopleSoft, the Addresses and Names Person Information records will create effective dated rows using the date of 01/01/1901.

Name Type History

Name History

Type of Name Primary

Names Detail Find First 1 of 1 Last

Effective Date 01/01/1901 [3]

Status Active

*Format Using English

Updated By

Display Name

Formal Name

Name

Last Update Date/Time 10/31/2018 2:04:45PM

OK Cancel Refresh

For IDs with existing PeopleSoft data on the above records where a new effective dated row is being added, the new row will add one day to the existing effective date.

Address History

Address Type Home

Address History Find First 1-3 of 3 Last

Effective Date 06/29/2016 [3]	Country USA	Status Active	Address 6460 19TH ST W APT A TACOMA, WA 984666126 PIERCE COUNTY	Update Addresses Address Linkage
Updated By	Updated 10/31/2018 10:21:51AM			
Effective Date 06/28/2016 [3]	Country USA	Status Active	Address 9850 NE Tanglewood Drive Vancouver, WA 98664-3982 Clark	Update Addresses Address Linkage
Updated By John Kellermeier	Updated 06/21/2016 2:37:27PM			
Effective Date 01/01/1901 [3]	Country USA	Status Active	Address 6460 19TH STREET #A TACOMA, WA 98466 PIERCE COUNTY	Update Addresses Address Linkage
Updated By	Updated 07/30/2014 3:48:14PM			

OK Cancel Refresh

Additionally, in the Biographical History data for existing PeopleSoft records, users will see a new effective dated row that is one day after the Date of Birth for the person on the Add/Update a Person page.

Common Conversion Issues - Student Bio/Demo

Blank Data

- Students without a valid Date of Birth (DOB) in legacy will be converted with a “(blank)” DOB in PeopleSoft.
- Students without a sex designation will be converted as “Unknown” in PeopleSoft.
- Students without a valid SSN will be converted with an SSN of “XXX-XX-XXXX”.

View All										
ID	Name	Gender	Date of Birth	Campus ID	National ID	National ID Country	NID Short Description	Last Name	First Name	
201008980	Smith,James	Male	01/14/1983	(blank)	XXXXXXXXXX	USA	SSN	SMITH	JAMES	
201010906	Smith,James W	Male	06/11/1949	(blank)	XXXXXXXXXX	USA	SSN	SMITH	JAMES	
201026366	Smith,James L	Male	09/21/1985	(blank)	XXXXXXXXXX	USA	SSN	SMITH	JAMES	
201049791	Smith,James L	Male	05/11/1959	(blank)	XXXXXXXXXX	USA	SSN	SMITH	JAMES	
201057639	Smith,James B	Male	10/29/1987	(blank)	XXXXXXXXXX	USA	SSN	SMITH	JAMES	
201068552	Smith,James	Male	02/04/1977	(blank)	XXXXXXXXXX	USA	SSN	SMITH	JAMES	
201082521	Smith,James A	Male	(blank)	(blank)	XXXXXXXXXX	USA	SSN	SMITH	JAMES	
201109784	Smith,James L	Male	03/02/1954	(blank)	XXXXXXXXXX	USA	SSN	SMITH	JAMES	
201118672	Smith,James A	Male	04/17/1985	(blank)	XXXXXXXXXX	USA	SSN	SMITH	JAMES	
201119140	Smith,James Patrick	Unknown	07/29/1963	(blank)	XXXXXXXXXX	USA	SSN	SMITH	JAMES	
201136370	Smith,James W	Male	10/07/1983	(blank)	XXXXXXXXXX	USA	SSN	SMITH	JAMES	

Bio/Demo Does Not Match SMS

- Data being updated from a converting college or data source
 - Please refer to the previous foldable titled **Conversion Background- Student Bio/Demo - Person Information** and read the [Bio/Demo - Conversion Legacy Source Details](#) section to evaluate if this record may have come from another data source.
 - When available, review the Effective Date of the PeopleSoft data to help determine if this record existed previous to conversion activity.
- Names

- The single Name field in SMS must be converted into the separate First Name, Middle Name, and Last Name fields in PeopleSoft. The spaces are used to differentiate between the names, beginning with Last Name, then Middle Name, and finally First Name.
 - If there are extra spaces between names, the conversion may convert a blank for that name field.
 - If the student has more than one last name that does not include a hyphen, the conversion program may place the names in the wrong PeopleSoft fields for First, Middle and Last Names
- Address
 - If a Legacy student has quotation marks (") in their legacy address, this will not show in PeopleSoft
 - This data does not need to be fixed in Legacy
 - Extra spaces in the address field can cause part of the address to not convert
 - International Address will error and not convert since the conversion is looking for a USA address format.
 - Addresses with Invalid State for the Zip Code will not convert
 - Addresses with missing State or Zip Code will not convert

Duplicate Records

Duplicate student records in one college's legacy system cause many PeopleSoft fields not to be populated during conversion. Duplicate legacy student records will be listed in college cleanup files, and it is recommended that these be resolved prior to the subsequent conversion cycle.

Duplicate student records in PeopleSoft cause matching converting student records to not load at all. Project staff will report these to the ERP support team to validate and resolve in PeopleSoft prior to the subsequent conversion cycle.

Bio/Demo Data Cleanup

Any legacy cleanup issues identified in this conversion cycle must be resolved in legacy before the next legacy system snapshot to avoid repeating the same issue in the next conversion cycle.

For the list of conversion snapshot dates, refer to the [Data Validation Overview - Getting Started guide on this topic](#).

Minimum Validation Requirements - Student Bio/Demo - Person Information

College Validation

Compare the following student Bio/Demo data between PeopleSoft and Legacy

- Name
- Address

- Phone Number
- Email Address
- Gender
- National ID (ex. SSN)
- Date of Birth

It is recommended that colleges validate a minimum of 50-100 records in each of the validation areas listed above using the queries provided or by selecting students based on your own legacy reporting. Colleges will need to determine what percentage of their legacy data to evaluate to be confident with conversion results.

Conversion Validation Steps - Bio/Demo

The following PeopleSoft queries may be of assistance if needing to find the equivalent ID between legacy and PeopleSoft.

PeopleSoft Query Navigation Path: Main Menu > Reporting Tools > Query > Query Viewer

- CTC_VAL_PS_ID_LOOKUP Search by Legacy SID to look up the PeopleSoft EMPLID assigned to a person
- CTC_VAL_LEGACY_SID_LOOKUP Search by PeopleSoft EMPLID to return any legacy ID and External System associated with a person

Using Validation Queries

In Bio/Demo conversion, we do not always have the student records in the system to be able to identify a student with a specific college record. Therefore, the queries use the External System for both the Student and Employee record. In many of the queries found in the validation steps below you will be prompted for your External System code to be able to view the records specific to your college.

College	External System	
	Employee	Student
DG5		
Grays Harbor College	02D	02S
Skagit Valley College	04D	04S
Everett Community College	05D	05S
Bellevue College	12D	12S
Green River College	14D	14S
Big Bend Community College	29D	29S

Whatcom Community College	32D	32S
Bellingham Technical	36D	36S
DG6		
Shoreline Community College	11D	11S
Yakima Valley College	24D	24S
Columbia Basin College	30D	30S
Walla Walla Community College	31D	31S
South Puget Sound Community College	35D	35S
Lake Washington Institute of Technology	37D	37S
Renton Technical College	38D	38S
Bates Technical College	39D	39S
Clover Park Technical College	40D	40S

Use the following Bio/Demo Queries to review Bio/Demo records in PeopleSoft and compare to legacy screens.

Navigation to the Query Viewer page: **PeopleSoft Query Navigation Path: Main Menu > Reporting Tools > Query > Query Viewer**

- CTC_VAL_BIO_CONVERTED_IDS Returns PeopleSoft and legacy IDs for employees and students converted from your college based on the External System codes entered in the prompts.
- CTC_VAL_BIO_CONVERTED_DATA Returns bio/demo data (name, date of birth, sex, address, phone number, email address, and masked SSN) for employees and students converted from your college based on the External System codes entered in the prompts. Includes both PeopleSoft and legacy IDs.
- This query returns a lot of data, and may result in an error. Either reduce the results by entering a letter to narrow down by the first letter of the last name or by following the steps in the [Running Large Results Queries \(Schedule Query\) QRG](#).

Person Name

Names from one of the legacy systems will convert to the Primary Name Type in PeopleSoft. Former names are not a part of the conversion process at this time. Existing PeopleSoft records that are updated in conversion will see a new effective dated row for the Primary Name type.

The single Name field in SMS is converted into the separate First Name, Middle Name, and Last Name fields in PeopleSoft. The spaces are used to differentiate between the names, beginning with Last Name, then First Name, and finally Middle Name. Names that do not follow this format were provided by the college via a supplemental conversion file, and will take priority over the name that would have converted from the student legacy system. Any names separated by spaces after the first three will not be converted.

The legacy Admissions screen (SM2001) depicted below shows one source for the Student Name:

A student who is also an employee will have a name source from the PPMS system and it will represent their legal name as displayed on their Social Security Card.

A student with no admissions record in SMS may have a name source from FAM, based on an incoming ISIR record.

To validate the name information converted to PeopleSoft follow the navigational path and steps below:

PeopleSoft Navigation Path: NavBar Icon > Navigator Icon > **Campus Community > Personal Information > Biographical > Names**

1. Navigate to the **Names** page
2. Input the **ID**, click the **Include History** checkbox and click **Search**
3. Click the **Names** link at the top right of the page
4. Click the **Names History** link for the Primary Name Type
5. The page will display middle name and any effective dated rows for the names associated with the ID
 - If name data was not updated by a converting record, only one row will display.

Name Type History

Name History

Type of Name Primary

Names Detail Find First 1-2 of 2 Last

Effective Date 09/24/2018	Display Name Jackson Black
Status Active	Formal Name Jackson Black
Format Using English	Name Black,Jackson
Updated By Jedi Hammitt	Last Update Date/Time 09/24/2018 9:24:50AM

Effective Date 08/12/2018	Display Name Jack Black
Status Active	Formal Name Jack Black
Format Using English	Name Black,Jack
Updated By Jedi Hammitt	Last Update Date/Time 08/12/2018 5:46:33PM

OK Cancel Refresh

Person Address

Addresses updated in conversion will populate the Address Types as shown below. Existing PeopleSoft records that are updated in conversion will have a new effective dated row for these Address Types.

Legacy Address	PeopleSoft Address Type
SMS/FAM Student	Home
SMS Alternate	Mail
PPMS Employee	Home
PPMS Mailing	Mail

SM2001-008 ADMISSIONS

SID.. [] [] [] SSN.. [] [] []

Branch..... [] YRQ Plan Strt. [] Stu Prg Appl.. []

Time Pref..... [] Adm Num..... [] App Rcpt Date. []

Adv Id..... [] Sex..... [] Birth Date.... []

Stu Name..... []

Prev Name..... [] Prev Name 2.. []

Stu Street..... [] Stu City..... []

Stu St..... [] Stu Zip..... []

Stu Day Phone. [] [] [] Stu Eve Phone [] [] []

PeopleSoft Navigation Path: Main Menu > Campus Community > Personal Information > Add/Update a Person

1. Navigate to the **Add/Update a Person** page
2. Input the **ID**, click the **Include History** checkbox and click **Search**
3. Click the **Addresses** tab at the top left of the page
4. Click the **Edit/View Address Detail** link for the Home Address Type

The page will display any effective dated rows for the address associated with the ID

Address History

Address Type Home

Address History

Find

First

1-2 of 2

Last

Effective Date

09/24/2018

Country

USA

Status

Active

Address

123 Main St
Milton, WA 98354

Update Addresses

Address Linkage

Updated By

Jedi Hammitt

Updated

09/24/2018 9:28:24AM

Effective Date

08/12/2018

Country

USA

Status

Active

Address

123 Main Street
Milton, WA 98354

Update Addresses

Address Linkage

Updated By

Jedi Hammitt

Updated

08/12/2018 5:46:33PM

OK

Cancel

Refresh

Person Phone

Phone numbers updated in conversion will populate the Phone Types as shown below. If the Stu Day Phone and Stu Eve Phone values coming from a legacy system are the same, then the phone number will only be converted to the Home Phone Type. Phone numbers in PeopleSoft are not effective dated, and an existing phone number can be overwritten for the Phone Types below by a converting record based on the priority logic applied.

Legacy Phone	PeopleSoft Phone Type
SMS/FAM Day	Home
SMS Evening	Mobile
PPMS Home	Home
PPMS Work	Business

The legacy Admissions screen (SM2001) depicted below shows the sources for the Student Phone:

SM2001-008

ADMISSIONS

SID.. [][][]

SSN.. [][][]

Branch..... []

YRQ Plan Strt. []

Stu Prg Appl.. []

Time Pref..... []

Adm Num..... []

App Rcpt Date. []

Adv Id..... []

Sex..... []

Birth Date.... []

Stu Name..... []

Prev Name..... []

Prev Name 2.. []

Stu Street.... []

Stu City..... []

Stu St..... []

Stu Zip..... []

Stu Day Phone. [][][]

Stu Eve Phone [][][]

To validate the phone information converted to PeopleSoft follow the navigational path and steps below:

PeopleSoft Navigation Path: Main Menu > Campus Community > Personal Information > Add/Update a Person

1. Navigate to the **Add/Update a Person** page.
2. Input the **ID** and click **Search**.
3. The phone numbers will display towards the bottom right on the Biographical Details tab.

The screenshot shows the 'Add/Update a Person' page in PeopleSoft. The 'Biographical Details' tab is selected. The page displays the following information:

- Person Information:** Date of Birth (08/12/2018), Birth Information, Campus ID.
- Biographical History:** *Effective Date (08/12/2018), *Marital Status (Unknown), *Gender (Male), As of (08/12/2018).
- National ID:** *Country (USA), *National ID Type (Social Security Number), National ID (XXX-XX-XXXX), Primary (checked).
- Contact Information:** Addresses (Home, Effective Date 09/24/2018, Status Active, Country USA, Address 123 Main St, Milton, WA 98354).
- Phone:** *Type (Home), *Phone (800/123-4567), Ext, Country, Preferred (checked).
- Email:** *Type, *Email Address, Preferred.

Buttons at the bottom include Save, Return to Search, Notify, Refresh, Add, Update/Display, Include History, and Correct History.

Person Email

Email addresses updated in conversion will populate the Email Types as shown below. Email addresses in PeopleSoft are not effective dated, and an existing email can be overwritten for the email types below by a converting record based on the priority logic applied.

- Note that if the incoming student legacy record takes priority, the email address inserted will first come from the Alternate Student Email supplemental file provided by the college for the conversion cycle. If the college has elected not to submit the supplemental file, or if a student is not listed in that file, then the email address will be sourced from the Email Address field on the SM5016 Alternate Address screen in the legacy system.

Legacy Email	PeopleSoft Email Type
SMS/FAM Student	Home
PPMS Employee Home	Home
PPMS .EDU email	Campus

The legacy Alternate Address screen (SM5016) depicted below shows the sources for the Student Email Address:

SM5016-003

ALTERNATE ADDRESS

SID... [] [] []

Stu Name... []

Stu Street 2... []

Stu City 2... []

Stu St 2... []

Stu Zip 2... []

Email Address []

To validate the email information converted to PeopleSoft follow the navigational path and steps below:

PeopleSoft Navigation Path: Main Menu > Campus Community > Personal Information > Add/Update a Person

1. Navigate to the **Add/Update a Person** page
2. Input the **ID** and click **Search**
3. The email address will display towards the bottom right on the Biographical Details tab

Biographical Details

Addresses

Regional

Jackson Black

201344779

Names

Person Information

Date of Birth []

Birth Information

Campus ID []

Biographical History

Find | View All

First 1 of 1 Last

*Effective Date 08/12/2018

*Marital Status Unknown

*Gender Male

As of 08/12/2018

National ID

Personalize | Find | 1 of 1 Last

*Country USA

*National ID Type Social Security Number

National ID XXX-XX-XXXX

Primary

Add

Contact Information

Addresses

Find | View All

First 1 of 1 Last

Address Type Home

Effective Date 08/24/2018

Status Active

Country USA

Address 123 Main St
Milton, WA 98354

Phone

*Type Home

*Phone 800-123-4567

Ext

Country Preferred

Add

Email

*Type Business

*Email Address jblack@sbcl.edu

Preferred

Add

Home

*Email Address jblack@gmail.com

Preferred

Add

Visa/Permit Data

Citizenship

Sex

Sex is converted into the Sex field in PeopleSoft. Sex in PeopleSoft is not effective dated, and an existing value can be overwritten by a converting record based on the priority logic applied.

The legacy Admissions screen (SM2001) depicted below shows the sources for the Student Sex:

The screenshot shows the legacy Admissions screen (SM2001) with a blue background and white text. The title 'SM2001-008 ADMISSIONS' is at the top. Below it, there are several fields for student information. The 'Sex' field is highlighted with a yellow box. The fields include: SID, SSN, Branch, YRQ Plan Strt, Stu Prg Appl, Time Pref, Adm Num, App Rcpt Date, Adv Id, Sex, Birth Date, Stu Name, Prev Name, Prev Name 2, Stu Street, and Stu City.

To validate the sex value converted to PeopleSoft follow the navigational path and steps below:

PeopleSoft Navigation Path: Main Menu > Campus Community > Personal Information > Add/Update a Person

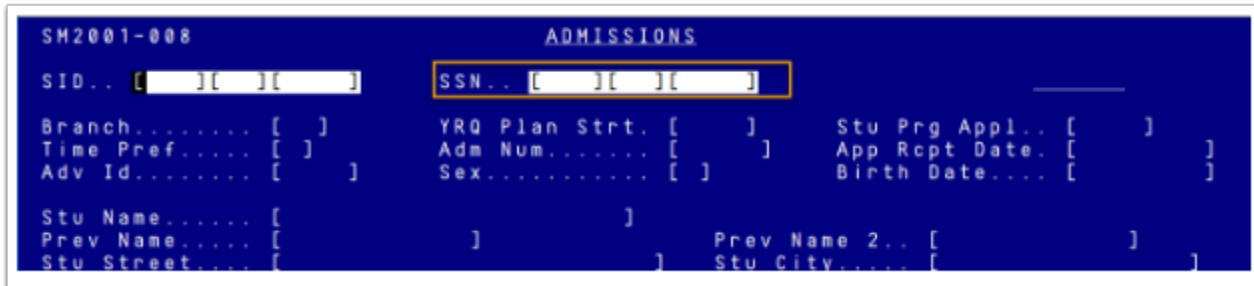
1. Navigate to the **Add/Update a Person** page
2. Input the **ID** click **Search**
3. Sex will display in the Biographical History section toward the top of the page on the Biographical Details tab

The screenshot shows the PeopleSoft Add/Update a Person page. The 'Biographical Details' tab is selected. The page displays the name 'Sally Sample' and the ID '201481151'. Below this, the 'Person Information' section shows the 'Date of Birth' as '04/22/1986' and the 'Campus ID' field. The 'Biographical History' section is expanded, showing the '*Effective Date' as '01/01/2016', '*Marital Status' as 'Married', and '*Sex' as 'Female'. The 'Sex' field is highlighted with a green box. Below the 'Sex' field, there is a link for 'Legal Definition of Sex'. The 'National ID' section is also visible, showing a table with columns for Country, National ID Type, National ID, and Primary. The table contains one row with 'USA', 'Social Security Number', '123-49-0210', and 'Primary' checked.

National ID (SSN OR ITIN)

National ID (SSN or ITIN) in PeopleSoft is not effective dated, and an existing National ID can be overwritten by a converting record based on the priority logic applied.

The legacy Admissions screen (SM2001) depicted below shows the sources for the Student SSN or National ID:

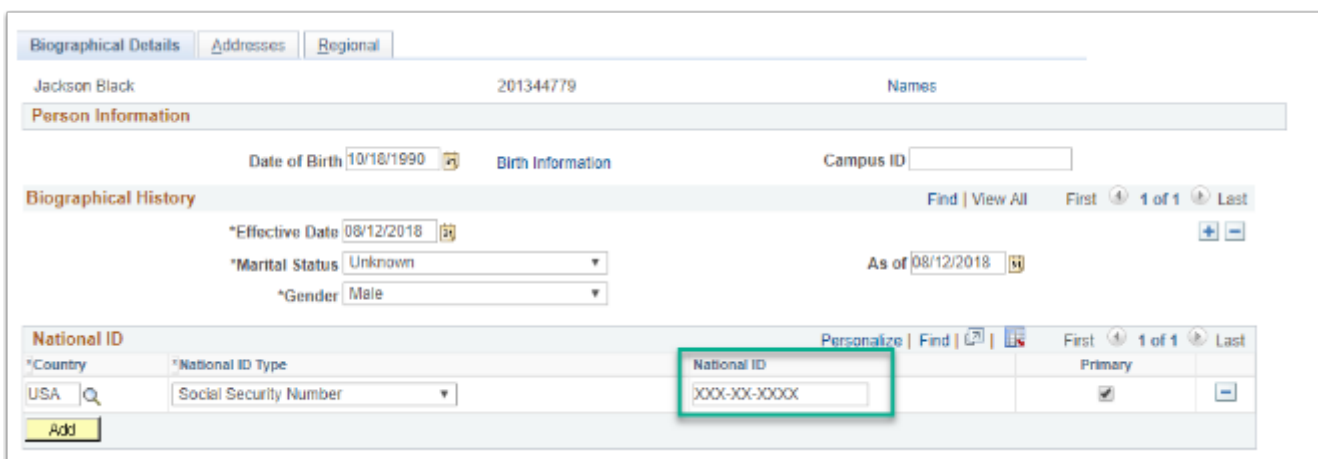


The screenshot shows the 'ADMISSIONS' screen with the title 'SM2001-008'. The 'SSN..' field is highlighted with a yellow box. Other fields include 'SID..', 'Branch...', 'Time Pref...', 'Adv Id...', 'Stu Name...', 'Prev Name...', 'Stu Street...', 'YRQ Plan Strt.', 'Adm Num...', 'Sex...', 'Stu Prg Appl..', 'App Rcpt Date.', 'Birth Date...', 'Prev Name 2..', and 'Stu City...'.

To validate the National ID information converted to PeopleSoft follow the navigational path and steps below:

PeopleSoft Navigation Path: Main Menu > Campus Community > Personal Information > Add/Update a Person

1. Navigate to the **Add/Update a Person** page
2. Input the **ID** and click **Search**
3. The National ID will display in the National ID section toward the middle of the page on the Biographical Details tab



The screenshot shows the 'Add/Update a Person' page with the 'Biographical Details' tab selected. The 'National ID' section is highlighted with a green box. It displays the 'National ID' as 'XXXX-XX-XXXX'. Other fields include 'Country' (USA), 'National ID Type' (Social Security Number), 'Effective Date' (08/12/2018), 'Marital Status' (Unknown), 'Gender' (Male), and 'Campus ID'.

Date of Birth

Date of Birth in PeopleSoft is not effective dated, and an existing Date of Birth can be overwritten by a converting record based on the priority logic applied.

The legacy Admissions screen (SM2001) depicted below shows the sources for the Student Date of Birth:

The screenshot shows the legacy Admissions screen (SM2001) with a blue background and white text. The title 'ADMISSIONS' is at the top. Below it, there are several fields for student information, including 'SID..', 'SSN..', 'Branch...', 'Time Pref...', 'Adv Id...', 'Stu Prg Appl..', 'App Rcpt Date..', 'Birth Date...', 'Stu Name...', 'Prev Name...', 'Prev Name 2..', 'Stu Street...', and 'Stu City...'. The 'Birth Date...' field is highlighted with a yellow box.

To validate the Date of Birth information converted to PeopleSoft follow the navigational path and steps below:

PeopleSoft Navigation Path: Main Menu > Campus Community > Personal Information > Add/Update a Person

1. Navigate to the **Add/Update a Person** page
2. Input the **ID** and click **Search**
3. Date of Birth will display in the Personal Information section at the top of the page on the Biographical Details tab

The screenshot shows the PeopleSoft 'Add/Update a Person' page. The 'Biographical Details' tab is selected. The 'Person Information' section is visible, showing the 'Date of Birth' field highlighted with a green box. Other fields include 'Birth Information', 'Campus ID', 'Effective Date', 'Marital Status', 'Gender', 'National ID', and 'Social Security Number'. The 'Date of Birth' field contains the value '10/18/1990'.

Conversion Detail – Citizenship and Birth Country

Conversion Background - Citizenship and Birth Country

Citizenship data is extracted via conversion activity referred to as C-017. The table below identifies the PeopleSoft field and the source field from legacy. The attached crosswalk document below contains the citizenship values from the CITIZ-STAT legacy field and the numeric value (and its translation) that will be loaded into PeopleSoft on the CITIZENSHIP_STATUS field.

PeopleSoft Field	PeopleSoft Field Description	Legacy Source System	Legacy Source Record	Legacy Extract Value /Source Field
EMPLID	Empl ID	SM	STU-D	SID
COUNTRY	Country	n/a		USA
CITIZENSHIP_STATUS	Citizenship Status	SM	STU-D	CITIZ_STAT cross walked to psft values



Citizen_Status_Crosswalk_Table.xlsx

Converting colleges provide citizenship and birth country data as supplemental files for international students. These files are loaded at the time of conversion. The citizenship row inserted into PeopleSoft for the international students indicated in the Country of Citizenship supplemental file is in addition to a "USA" row, if it exists in legacy for that student.

If the student was not provided in the Birth Country supplemental file, then no Birth Country will be added to the student's record.

Common Conversion Issues – Citizenship and Birth Country

- Duplicates are the main cause of errors with Citizenship data. An existing duplicate from the legacy system would need to be resolved by the converting college in the legacy system prior to future conversion cycles. An existing duplicate in PeopleSoft will be reported to the ERP support team to validate and resolve in PeopleSoft prior to future conversion cycles.
- Birth Country will only apply from the supplemental file to students converted from SMS. If the source of Student data is from PPMS and the student appeared in the supplemental file, that data may not convert.
- If your college has an incoming employment record for a student and it takes priority during the conversion, then the student may have a citizenship row for a non-USA country, but will not have a USA citizenship row, as USA citizenship is not converted from employment records.
- If PeopleSoft values do not match what is in your legacy system it is most commonly due to another college's record for the same student taking priority during the conversion process. For steps to determine if this may be the case, please review "Source Tips and Clues" in the "Conversion Background - Student Bio/Demo - Person Information" section.

Legacy Data Cleanup - Citizenship and Birth Country

Any legacy cleanup issues identified in this conversion cycle must be resolved in legacy before the next legacy system snapshot to avoid repeating the same issue in the next conversion cycle. For the list of conversion snapshot dates, refer to the [Data Validation Overview - Getting Started guide on this topic](#).

Minimum Validation Requirements – Citizenship

Converting colleges should use the supplemental files they provided for citizenship and birth country and select approximately 50 of the records to validate that these were populated as expected in PeopleSoft. Additionally, colleges should verify that the legacy USA citizenship status converted correctly using the provided query in the following section.

Conversion Validation Steps – Citizenship and Birth Country

Citizenship

Citizenship data in PeopleSoft is not effective dated, and existing citizenship can be overwritten by a converting record based on the priority logic applied.

PeopleSoft Navigation Path: Main Menu > Campus Community > Personal Information > Identification > Citizenship > Citizenship and Passport

1. Navigate to the **Citizenship/Passport** page
2. Input the **ID** and click **Search**
3. Click the **View All** link in the top right corner

PeopleSoft Query Navigation Path: Main Menu > Reporting Tools > Query > Query Viewer

CTC_VAL_BIO_CITIZENSHIP Returns citizenship data and PeopleSoft and legacy IDs for converted employees and students converted from your college based on the External System codes entered in the prompts. Refer to the External System table in the “Conversion Validation Steps Bio/Demo” section for your college’s External System codes.

The screenshot displays two instances of the 'Citizenship/Passport' form in PeopleSoft. The top form shows a record for a person with the name 'Jackson Black' and ID '201344779'. The 'Country' field is set to 'JPN' (Japan), and the 'Citizenship Status' is 'Alien Temporary'. A green box highlights the 'Country' field, and a callout 'Converted from Citizenship File' points to it. The bottom form shows a similar record, but the 'Country' is 'USA' (United States) and the 'Citizenship Status' is 'Alien Temporary'. A green box highlights the 'Citizenship Status' field, and a callout 'Converted based on Legacy Crosswalk' points to it. Both forms include fields for 'Passport Number', 'Issue Date', 'Expiration Date', 'State', 'City', 'Issuing Authority', and 'Comment'. The bottom of the screen shows 'Save', 'Return to Search', and 'Notify' buttons.

Birth Country

Birth country data in PeopleSoft is not effective dated, and existing Birth Information can be overwritten by a converting record based on the priority logic applied.

PeopleSoft Navigation Path: Main Menu > Campus Community > Personal Information > Add/Update a Person

1. Navigate to the **Add/Update a Person** page
2. Input the **ID** and click **Search**
3. Click the link for **Birth Information** in the Person Information section next to Date of Birth

PeopleSoft Query Navigation Path: Main Menu > Reporting Tools > Query > Query Viewer

CTC_VAL_BIO_BIRTH_COUNTRY Returns birth country data and PeopleSoft and legacy IDs for converted employees and students converted from your college based on the External System codes entered in the prompts. Refer to the External System table in the "Conversion Validation Steps Bio/Demo" section for your college's External System codes.

The screenshot shows a web application interface with several sections: 'Biographical Details', 'Addresses', and 'Regional'. The 'Person Information' section includes a 'Date of Birth' field set to 04/22/1987 and a 'Campus ID' field. The 'Biographical History' section includes fields for '*Effective Date' (04/23/1987), '*Marital Status' (Single), and '*Gender' (Female). The 'National ID' section is currently empty. A 'Birth Information' dialog box is open, showing a 'Birth Location' field, a 'Birth Country' dropdown menu set to 'VNM' (Viet Nam), and a 'Birth State' field. The dialog box also contains 'OK', 'Cancel', and 'Refresh' buttons.

Conversion Detail – Visa/Permit

Conversion Background – Visa/Permit

Visa and permit data is extracted via conversion activity referred to as C-018. The table below identifies the PeopleSoft field and the source field from legacy. Visa type is determined from the value in the CITIZ-STAT legacy field and translated to a visa type per the attached crosswalk document below.

PeopleSoft Field	PeopleSoft Field Description	Legacy Source System	Legacy Source Record	Legacy Extract Value /Source Field
EMPLID	Empl ID	SM	STU-D	SID
COUNTRY	Country	n/a		USA
VISA_PERMIT_TYPE	Visa/Permit Type	SM	STU-D	CITIZ-STAT
EFFDT	Effective Date	SM	YRQ-M	LAST-REG-DATE
VISA_WRPMT_STATUS	Visa/Permit Status	n/a		G-granted
STATUS_DT	Status Date	SM	YRQ-M	LAST-REG-DATE
DURATION_TYPE	Type of Duration	n/a		Y-years



Common Conversion Issues – Visa/Permit

- Some two-digit years in the Visa status date convert to the year 19XX instead of 20XX.
- If a student already exists in PeopleSoft with Visa/Permit data, this is not updated by incoming colleges.

Legacy Data Cleanup - Visa/Permit

Any legacy cleanup issues identified in this conversion cycle must be resolved in legacy before the next legacy system snapshot to avoid repeating the same issue in the next conversion cycle.

For the list of conversion snapshot dates, refer to the [Data Validation Overview - Getting Started guide on this topic](#).

Minimum Validation Requirements – Visa/Permit

Converting colleges should use the query provided in the following section and select a minimum of 50 records to validate that Visa/Permit status was populated as expected in PeopleSoft.

Conversion Validation Steps – Visa/Permit

The screenshot shows the 'ADMISSIONS' form in PeopleSoft. The form is titled 'SM2001-008' and 'ADMISSIONS'. It contains several fields for student information, including:

- SID.. [] [] []
- SSN.. [] [] []
- Branch..... []
- YRQ Plan Strt. []
- Stu Prg Appl.. []
- Time Pref..... []
- Adm Num..... []
- App Rcpt Date. []
- Adv Id..... []
- Sex..... []
- Birth Date.... []
- Stu Name..... []
- Prev Name..... []
- Prev Name 2.. []
- Stu Street.... []
- Stu City..... []
- Stu St..... []
- Stu Zip..... []
- Stu Day Phone. [] [] []
- Stu Eve Phone [] [] []
- Census Race Cd []
- Census Race Cd2 []
- Census Hisp Cd []
- Citz Stat. []
- Res Stat..... []
- Fee Pay Stat.. []
- Vet Bene.... []

PeopleSoft Navigation Path: Main Menu > Campus Community > Personal Information > Identification > Citizenship > Visa Permit Data

1. Navigate to the **Visa Permit Data** page
2. Input the **ID** and click **Search**
3. **Country** should be **USA**

4. Confirm the **Visa Type** matches legacy

PeopleSoft Query Navigation Path: Main Menu > Reporting Tools > Query > Query Viewer

CTC_VAL_BIO_VISA Returns visa data and PeopleSoft and legacy IDs for converted employees and students converted from your college based on the External System codes entered in the prompts. Refer to the External System table in the “Conversion Validation Steps Bio/Demo” section for your college’s External System codes.

The screenshot shows the 'Visa/Permit Data' form in PeopleSoft. The form is for a record with ID 201344779. The 'Country' field is set to 'USA' and the 'Type' field is set to 'F1'. The 'Classification' is 'Visa'. The 'Effective Date' is '09/24/2018'. The 'Status' is 'Applied' and the 'Status Date' is '09/24/2018'. The 'Duration Type' is 'Months'. There are also fields for 'Number', 'Issue Date', 'Date of Entry into Country', 'Expiration Date', 'Issuing Authority', and 'Issue Place'. A 'Supporting Documents Needed' table is at the bottom with columns for 'Document ID', 'Description', 'Request Date', and 'Date Received'. The table is currently empty.

Conversion Detail – Ethnicity

Conversion Background – Ethnicity

Ethnicity data is extracted and cross walked to the PeopleSoft value based on the crosswalk attached below. The data is extracted via conversion activity referred to as C-014. The table below identifies the PeopleSoft field and the source field from legacy. The Hispanic flag in PeopleSoft is set to “Y” based on the Census Race Codes that are added to the student’s record in PeopleSoft. The Ethnic Group Crosswalk Table below indicates which Ethnic Groups will trigger the “Y” value. The primary ethnicity flag will be set to “Y” for the value in the CENSUS-RACE-CD legacy field.

PeopleSoft Field	PeopleSoft Field Description	Legacy Source System	Legacy Source Record	Legacy Extract Value /Source Field
EMPLID	Empl ID	SM or TRAN	STU-D or TRAN-STU-D	SID
REG_REGION	Regulatory Region	< ppsft system >		USA
ETHNIC_GRP_CD	Ethnic Group	SM or TRAN	STU-D or TRAN-STU-D	CENSUS-RACE-CD
		SM or TRAN	STU-D or TRAN-STU-D	CENCUS-RACE-CD2
		SM or TRAN	STU-D or TRAN-STU-D	CENSUS-HISP-CD



Common Conversion Issues – Ethnicity

- FAM does not store ethnicity data. If the record converted from FAM and the student does not have any SMS data, then the ethnicity field will be blank.
- If the Eth Orig legacy field is blank or has a space, then Census Race Codes for the student are not extracted from legacy, and subsequently are not converted into PeopleSoft.
- If PeopleSoft values do not match what is in your legacy system it is most commonly due to another college's record for the same student taking priority during the conversion process. For steps to determine if this may be the case, please review "Source Tips and Clues" in the "Conversion Background - Student Bio/Demo - Person Information" section.

Legacy Data Cleanup - Ethnicity

Any legacy cleanup issues identified in this conversion cycle must be resolved in legacy before the next legacy system snapshot to avoid repeating the same issue in the next conversion cycle. For the list of conversion snapshot dates, refer to the [Data Validation Overview - Getting Started guide on this topic](#).

Minimum Validation Requirements – Ethnicity

Converting colleges should use the query provided in the following section and select a minimum of 50 records to validate that ethnicity data was populated as expected in PeopleSoft.

Conversion Validation Steps – Ethnicity

Ethnicity

Ethnicity data is effective dated. A student record may have multiple rows for Ethnic Groups, and converting data will be added to the list, if it is not already present. Note that 'NSPEC' is not inserted if values already exist on the student's record. The 'Primary' and 'Hispanic' flags are not effective dated and may be replaced based on information from converting records.

SM2001-008 ADMISSIONS

SID.. [] [] [] [] SSN.. [] [] [] [] [] [] [] []

Branch..... [] YRQ Plan Strt. [] Stu Prg Appl.. []

Time Pref..... [] Adm Num..... [] App Rcpt Date. []

Adv Id..... [] Sex..... [] Birth Date.... []

Stu Name..... []

Prev Name..... [] Prev Name 2.. []

Stu Street..... [] Stu City..... []

Stu St..... [] Stu Zip..... []

Stu Day Phone. [] [] [] [] Stu Eve Phone [] [] [] []

Census Race Cd [] Census Race Cd2 [] Census Hisp Cd []

Citz Stat. [] Res Stat..... [] Fee Pay Stat.. [] Vet Bene.... []

Navigation Path: Main Menu > Campus Community > Personal Information > Biographical > Personal Attributes > Ethnicity

1. Navigate to the **Ethnicity** page
2. Input the **ID** and click **Search**
3. Confirm that the **Ethnic Group** code matches legacy

PeopleSoft Query Navigation Path: Main Menu> Reporting Tools> Query > Query Viewer

CTC_VAL_BIO_ETHNICITY Returns ethnicity data and PeopleSoft and legacy IDs for converted employees and students converted from your college based on the External System codes entered in the prompts. Refer to the External System table in the “Conversion Validation Steps Bio/Demo” section for your college’s External System codes.

Ethnicity

Jack Black 201344773

☐ Person Is Hispanic or Latino If Yes, select Ethnic Group: []

*Regulatory Region	*Ethnic Group	Description	Ethnic Category	Primary	IPEDS	Percentage	Updated on	Updated By
USA	JAPANESE	Japanese	Asian	<input checked="" type="checkbox"/>	<input type="checkbox"/>		08/10/18 10:38:26AM	Vedar,Darth
USA	WHITE	White	White	<input type="checkbox"/>	<input type="checkbox"/>		08/10/18 10:38:47AM	Vedar,Darth

Record Last Updated: 08/10/18 10:38:47AM Record Last Updated By: Vedar,Darth

[Save](#) [Return to Search](#) [Notify](#) [Refresh](#)

Conversion Detail – Disability and Accommodation Data

Conversion Background – Disability and Accommodation Data

Disability and accommodation data are extracted via conversion activity referred to as C-019. The table below identifies the PeopleSoft field and the source field from legacy. There are two sets of data that are converted to PeopleSoft: one will convert as a “Disabled” yes/no indicator and the other will convert for that student’s accommodation data.

PeopleSoft Field	PeopleSoft Field Description	Legacy Source System	Legacy Source Record	Legacy Extract Value /Source Field
EMPLID	Empl ID	SM	STU-D	SID
EMPL_RCD	Empl Rcd Nbr			0
ACCOMMODATION_ID	Accommodation ID			1
REG_REGION	Regulatory Region			USA
DIAGNOSIS_CD	Diagnosis Code	SM	STU-D	HLTH-LIM - see note below

Diagnosis Code

The extract process converts the legacy values into a series of two-character values that include a number in the first position and a letter value in the second position. If a value from legacy includes a number in the first position, that number and the proceeding letter value will be considered one code and validated against the crosswalk table below. If it is not in the crosswalk, it will be bypassed. Any letter values of "A" through "S" after that will have a corresponding number value assigned just prior to the letter, per the crosswalk table below. All other values will be excluded from the extract. One row for each valid diagnosis code will be inserted into the student's Accommodation record.

Example 1: A student with the legacy value "2EKQ" would have three diagnosis code rows in the Accommodation record in PeopleSoft: one each for "2E", "K", and "Q". The latter two would be converted to "6K" and "7Q".

Example 2: A student with the legacy value "6NE" would have two diagnosis code rows in the Accommodation record in PeopleSoft: one each for "6N" and "E". The latter would be converted to "2E".

Example 3: A student with the legacy value "2NS" would have one diagnosis code row in the Accommodation record in PeopleSoft for "S". "2N" is not a valid value in the crosswalk below and would be excluded, and "S" would be converted to "8S".

Accommodation Crosswalk Table:

Legacy Value (HLTH-LIM)	PeopleSoft Value (DIAGNOSIS_CD)	PeopleSoft Description
A	1A	Deaf
B	1B	Severe to moderate hearing loss
C	2C	Limited gait or range of motion
D	2D	Paraplegic
E	2E	Quadriplegic
F	3F	Speech or language disorder
G	4G	Attention Deficit Disorder
H	4H	Dyslexia or Processing Deficit
I	5I	Blind
J	5J	Visual Disorders other blind
K	6K	Cancer
L	6L	Cardiovascular Pulmonary
M	6M	Orthopedic Conditions
N	6N	Internal Medical disorders
O	7O	Motor Neuron
P	7P	Acquired brain injury
Q	7Q	Developmental disability
R	8R	Mental disorders
S	8S	Autism spectrum disorders

Common Conversion Issues – Disability and Accommodation Data

- If the disability flag = Y on a preexisting record, this value will not be removed if an incoming record takes priority where no disability flag exists.
- If PeopleSoft values do not match what is in your legacy system it is most commonly due to another college's record for the same student taking priority during the conversion process. For steps to determine if this may be the case, please review "Source Tips and Clues" in the "Conversion Background - Student Bio/Demo - Person Information" section.

Legacy Data Cleanup - Disability and Accommodation

Any legacy cleanup issues identified in this conversion cycle must be resolved in legacy before the next legacy system snapshot to avoid repeating the same issue in the next conversion cycle.

For the list of conversion snapshot dates, refer to the [Data Validation Overview - Getting Started guide on this topic](#).

Minimum Validation Requirements – Disability and Accommodations Data

Converting colleges should use the queries provided in the following section and select a minimum of 50 records to validate that disability and accommodation data was populated as expected in PeopleSoft.

Conversion Validation Steps – Disability and Accommodation

Disability

The Disabled flag (checkbox) in PeopleSoft is not effective dated, and an existing value of “N” (or no checkmark) can be overwritten with a “Y” (checkmark) from disability data from a converting record based on priority logic applied.

The screenshot shows the 'STUDENT RECORDS' form in PeopleSoft. The record ID is SM5001-008. The form contains fields for personal information, contact details, and academic status. The 'DIS' field (Disabled flag) is located at the bottom left and is highlighted with a yellow box. The 'DSS' field (Disability Status) is located at the bottom right and is also highlighted with a yellow box.

PeopleSoft Navigation Path: Main Menu > Campus Community > Personal Information > Add/Update a Person

1. Navigate to the **Add/Update a Person** page
2. Input the **ID** and click **Search**
3. Click on the **Regional** tab
4. Converted person records should have the **Disabled** box check at the bottom left of this page

Biographical Details | Addresses | **Regional**

Jedi Hammit 201344769

USA

Ethnicity

☐ Person is Hispanic or Latino If Yes, Select Ethnic Group

*Regulatory Region	*Ethnic Group	Description	Ethnic Category	Primary	IPEDS	Percentage
USA	BLACK	Black	Black	<input type="checkbox"/>	<input type="checkbox"/>	
USA	WHITE	White	White	<input type="checkbox"/>	<input type="checkbox"/>	

History

*Effective Date 11/02/2018 Military Status

☒ Disabled ☐ Disabled Veteran ☐ VA Benefit

Save Return to Search Notify Refresh Add Update/Display Include History Correct History

Biographical Details | Addresses | Regional

Accommodation

Accommodation Data is not effective dated, and Diagnosis Codes from converting records are added to those that may have existed previously in PeopleSoft based on the priority logic applied.

Navigation Path: Main Menu > Campus Community > Personal Information > Health Information > Accommodation Data

1. Navigate to the **Accommodation Data** page
2. Input the **ID** and click **Search**
3. Validate that the **Diagnosis Code** matches legacy based on the crosswalk above
 - Students may have more than one code in PeopleSoft, click **View All** to view all converted codes

Query

PeopleSoft Query Navigation Path: Main Menu > Reporting Tools > Query > Query Viewer

CTC_VAL_BIO_DISAB_ACCOM Returns disability and accommodation values, along with PeopleSoft and legacy IDs for converted employees and students converted from your college, based on the External System codes entered in the prompts. A new row is returned by this reported for every Diagnosis Code that exists on a student's record. Refer to the External System table in the "Conversion Validation Steps Bio/Demo" section for your college's External System codes.

Accommodation Request Accommodation Option Accommodation Job Task

Request Details Find | View All First 1 of 1 Last

*Accommodation ID [1] *Date of Request [01/02/2013]

Business Unit
Department
Job Code
Location Code
Comment
*Responsible ID [CNV]

Request Status *As of [01/02/2013] Pending Accepted Undue Hardship

Disability Personalize Find View All First 1-3 of 4 Last

*Regulatory Region	Diagnosis Code	Description
1 USA	1A	Deaf
2 USA	1B	Severe to moderate hearing los
3 USA	70	Motor neuron

Save Return to Search Notify

Accommodation Request | Accommodation Option | Accommodation Job Task

Conversion Detail – Residency

Conversion Background – Residency

Residency data is extracted via conversion activity referred to as C-019. All converted students' residency data is converted with their last term or last 4 quarters/terms if they were enrolled in the last year.

SM2001-008 ADMISSIONS

SID.. [] [] [] SSN.. [] [] [] [] [] []

Branch..... [] YRQ Plan Strt. [] Stu Prg Appl.. []

Time Pref..... [] Adm Num..... [] App Rcpt Date. []

Adv Id..... [] Sex..... [] Birth Date.... []

Stu Name..... []

Prev Name..... [] Prev Name 2.. []

Stu Street.... [] Stu City..... []

Stu St..... [] Stu Zip..... []

Stu Day Phone. [] [] [] Stu Eve Phone [] [] []

Meta Major..... []

Census Race Cd [] Census Race Cd2 [] Census Hisp Cd []

Citz Stat. [] Res Stat..... [] Fee Pay Stat.. [] Vet Bene... []

PeopleSoft Field	PeopleSoft Field Description	Legacy Source System	Legacy Source Record	Legacy Extract Value / Source Field
EMPLID	Empl ID	SM	STU-YRQ-M	SQ-SID
ACAD_CAREER	Academic Career	< translation >		"UGRD" or "CNED"
INSTITUTION	Academic Institution	TBL4	COL-INFO-M	COL
EFFECTIVE_TERM	Effective Term	SM	Stu-YRQ-M	Last YRQ enrolled if no Stu-YRQ-M then Stu-D YRQ Plan-Start, if not in those then last YRQ TRAN, if no YRQ anywhere error out
RESIDENCY_DT	Residency Date	n/a		Start date of YRQ above
RESIDENCY	Residency	SM	Stu-YRQ-M or Stu-D	RES-STAT enrolled if no Stu-YRQ-M then Stu-D RES-STAT Plan-Start and Fee-Pay-Stat 35
ADMISSION_RES	Admissions Residency			<blank>
FIN_AID_FED_RES	Fin Aid Federal Residency			<blank>
FIN_AID_ST_RES	Fin Aid State Residency			<blank>

Residency Crosswalk Table:

Legacy Value (RES-STAT)	PeopleSoft Value (RESIDENCY)	PeopleSoft Description
1	IS	In State
2	OS	Out of State
3	UD	Undetermined
35	IN	International

Residency Exception Crosswalk Table:

Legacy Value (FEE-PAY-STAT)	PeopleSoft Value (TUITION_EXCPT)	PeopleSoft Description
9	SF01	Active Duty Military & Depndnt
25	SF02	American Indian
30	SF03	Border County
Not converted	SF04	High School Grad Seek Res
36	SF05	In-State High School Grad
Not converted	SF06	S&D of Active Military OFS
Not converted	SF07	E-3, H-1 or L Visa & Family

Common Conversion Issues – Residency

- If the student has duplicate records in legacy, then residency fails to load. Duplicates will be sent to colleges for cleanup.
- If there is an error in the student's program/plan stack, then residency fails to load.
- If there is a mismatch between students' program/plan stack career and the residency career, then residency fails to load.

- If the student had no enrollment in legacy or if the enrollment fails to convert, then residency fails to load.
- Applicants with Prior Enrollment - Residency (RES STAT and FEE PAY STAT) is extracted from SM5018 for applicant students with prior enrollment, even if more recent admissions data has been entered on SM2001. The ctcLink project team will identify the students with different RES STAT and FEE PAY STAT codes and correct their records during go-live weekend.

Legacy Data Cleanup - Residency

Any legacy cleanup issues identified in this conversion cycle must be resolved in legacy before the next legacy system snapshot to avoid repeating the same issue in the next conversion cycle.

For the list of conversion snapshot dates, refer to the [Data Validation Overview - Getting Started guide on this topic](#).

Minimum Validation Requirements – Residency

Converting colleges should use the query provided in the section below and select a minimum of 50 records to validate that residency data was populated as expected in PeopleSoft.

- Residency Code
- Students with International residency
- Students with residency exceptions
 - For students who converted with Out of State, Undetermined, or International Residency who also had a residency exception, Residency will reflect the Legacy residency value but the Tuition Residency field will be updated to In State based on the residency exception code.

Conversion Validation Steps – Residency

Navigation Path: Main Menu > Campus Community > Personal Information > Identification > Residency Data

1. Navigate to the **Residency Data** page
2. Input the **ID** and click **Search**
3. Validate the Residency code matches legacy based on the crosswalk and validation requirements listed above

PeopleSoft Query Navigation Path: Main Menu > Reporting Tools > Query > Query Viewer

CTC_VAL_BIO_RESIDENCY Returns students with a converted External ID for your college and a record on the Residency table to compare to legacy.

- If a student converted with a residency exception code, the query will return data in the Tuition Residency Exception and Tuition Res Except Description fields, otherwise these fields will be blank

ctcLink Student Homepage **Residency Data** New Window | Help

Residency Official 1 | Residency Official 2 | Residency Appeal | Residency Self-Report

Kyrsten Test 201579118

Residency Data 2 of 2 [View All](#)

Academic Career Academic Career + -

Official Residency Data 2 of 15 [View All](#)

Original residency from Legacy

*Institution WA062 Seattle Central College

*Effective Term 2207 FALL 2020

Residency Out of State

Residency Date

Additional Residency Data

Admissions	In State	Admission Residency Exception	Active Duty Military & Depndnt
Fin Aid Federal Residency	In State	Fin Aid Fed Residency Excpt	Active Duty Military & Depndnt
Fin Aid State Residency	In State	Fin Aid State Residency Excpt	Active Duty Military & Depndnt
Tuition	In State	Tuition Residency Exception	Active Duty Military & Depndnt

Will be blank for students with no exceptions

Will match original residency from Legacy UNLESS student has exception. If an exception is converted, these fields will reflect In State residency

Conversion Detail – Emergency Contacts

Conversion Background – Emergency Contacts

Emergency contact data is extracted via conversion activity referred to as C-016 and consists of the Emergency contact Name and Phone number.

SM5001-008 STUDENT RECORDS

SID. [] [] [] SSN. [] [] [] Stu Name. []

Prev Name..... [] Prev Name 2.. []

Stu Street..... [] Stu City..... []

Stu St..... [] Stu Zip..... []

Stu Day Phone.. [] [] [] Stu Eve Phone. [] [] []

Emerg Phone.... [] [] []

Emerg Contact.. []

Res Stat..... [] Fee Pay Stat.. []

Stu Int..... [] Stu Prg Enr... []

Stu Enr Stat... [] Adv Id..... []

DIS..... [] OSS..... []

Common Conversion Issues – Emergency Contacts

- If PeopleSoft values do not match what is in your legacy system it is most commonly due to another college's record for the same student taking priority during the conversion process. For steps to determine if this may be the case, please review "Source Tips and Clues" in the "Conversion Background - Student Bio/Demo - Person Information" section.

Minimum Validation Requirements – Emergency Contacts

Converting colleges should use the query provided in the section below and select a minimum of 50 percent of the records to validate that emergency contact information was populated as expected in PeopleSoft.

Conversion Validation Steps – Emergency Contacts

Navigation Path: Main Menu > Campus Community > Personal Information > Biographical > Emergency Contacts

1. Navigate to the **Emergency Contacts** page
2. Input the **ID** and click **Search**
3. Validate the Emergency Contact information matches legacy

PeopleSoft Query Navigation Path: Main Menu > Reporting Tools > Query > Query Viewer

CTC_VAL_BIO_EMERGENCY_CONTACT Returns emergency contact data and PeopleSoft and legacy IDs for converted employees and students converted from your college, based on the External System codes entered in the prompts. Refer to the External System table in the “Conversion Validation Steps Bio/Demo” section for your college’s External System codes.

The screenshot shows the 'Emergency Contact Information' form in PeopleSoft. At the top, there are two tabs: 'Emergency Contact Information' and 'Emergency Contact OtherPhones'. The 'Emergency Contact Information' tab is active. Below the tabs, there is a search bar with the text '*Contact Name FAX 3606858117'. To the right of the search bar are buttons for 'Find', 'View All', 'First', '1 of 1', and 'Last'. Below the search bar, there is a dropdown menu for '*Relationship' with 'Other' selected, and a checkbox for 'Primary Contact' which is checked. There are also two unchecked checkboxes: 'Same Address as Individual' and 'Same Phone as Individual'. Below these, there is a section for 'Contact Address' with a dropdown for 'Country' set to 'USA' and a search icon. Below the country dropdown is a text field for 'Address' and a button for 'Edit Address'. Below the address section, there is a section for 'Contact Phone' with three text fields: 'Phone', 'Extension', and 'Country'. At the bottom of the form, there are three buttons: 'Save', 'Return to Search', and 'Notify'. Below the buttons, there is a breadcrumb trail: 'Emergency Contact Information | Emergency Contact OtherPhones'.

Submitting Data Validation Results

College Data Validation SMEs will communicate any conversion issues they encounter during their data validation via the Oracle Test Manager (OTM) application. The ctcLink Testing Team will provide OTM orientation materials before the data validation period for any College Data Validation SMEs who are not familiar with the tool. Please refer to the [Data Validation Overview - Reporting Issues](#) guide for more information on using OTM.

When logging a new issue in OTM related to data being validated through this guide, remember to use the following values for these specific required fields in your issue entry under the project tied to this Deployment Group and CS Data Validation Cycle:

- **Summary:** *(Provide a title for the issue discovered)*
- **Assigned To:**
 - **Kyrsten Catlin** (Residency)
 - **Amanda Hoover** (All other Bio/Demo areas)
- **Status:** *(Leave as NEW)*
- **College or Location :** *(Specify the college or district)*
- **Priority:** *(Leave blank - not used)*