

SAP Item #6B: Legacy Transfer Units in MAXT Course Exclusions

User Acceptance Testing (UAT) for Maximum Attempted Units Test

UAT Kick-Off Session

Session Date/Time: 10am to 11:30am on 10/31/2023

Webex UAT Session Recording: <https://sbctc.webex.com/webappng/sites/sbctc/recording/3899b39e5a3d103ca6f2d289e29a95ca/playback>

Slide Deck:



2023-10-31 SAP 6B - UAT - Legacy Transfer Uni.pptx

Key UAT Dates

UAT Testing Period: 10/31 to 11/13

UAT Sign-Off: Due by 7pm on 11/13/2023

UAT Sign-Off Survey: <https://www.surveymonkey.com/r/WKMPWG6>

Please ensure only one response is submitted per college that participated in testing.

Target Implementation: 11/28/2023

Testing Environment

Link to PQA Environment: <https://pt-pqa.peoplesoft-nonprod-aws.ctclink.sbctc.edu/ptpqa/signon.html>

Last Refresh Date: 10/19/2023

Username: Your EMPLID

Password: *[shared with testers after the session]*

Questions?

Email Amanda Hoover (ahoover@sbctc.edu) and CC Ana Ybarra (aybarra@sbctc.edu)

Trouble Logging In?

Email Caitlin Stein (cstein@sbctc.edu)

Need to Report an Issue?

Submit a ticket to the Service Desk and provide as many details as possible, including screenshots, IDs used, and steps taken to produce the issue or error.

Link to ticketing system: <https://servicedesk.sbctc.edu/>

Request Type: ctcLink Support > Testing


Subject: UAT – FA SAP Legacy Data in MAXT – [description of issue]

SAP Process Overview

Eight tests are used to determine a Satisfactory Academic Status (SAP) status. Depending on the tests a college has activated, one or more tests will be executed when the SAP Process is run for an individual student or batch of students. The possible tests are:

- Academic Standing
- **Maximum Attempted Units***
- Maximum Attempted Terms
- Minimum Current GPA
- Minimum Cumulative GPA
- Current Earned Units
- Cumulative Earned Units
- Two Year GPA

*** The focus of this testing activity is isolated to the Maximum Attempted Units Test.**

 While there are other areas in the SAP program reported as having issues, they are being handled separately through enhancements being addressed through the larger FA SAP Maintenance Item list from FAST.

Maximum Attempted Units Test Functionality

Maximum Attempted Units Test Configuration

- References the Maximum Attempted Units Test configurations on the Criteria 1 tab of the SAP Define Set Up page, and calculates based on the configurations on the Course Exclusions page.
- Calculates the total Maximum Attempted Units value and assigns a SAP Status for the test based on unit ranges defined in the college's local configuration.

Image: Maximum Attempted Units configuration on SAP Define Set Up Criteria 1 page

Navigation: Set Up SACR > Product Related > Financial Aid > Satisfactory Academic Progress > Define Set Up Criteria >> Criteria 1 tab

Maximum Attempted Units Test

☒ Use Max Attempted Units Test

Activates the Maximum Attempted Units Test

Max Attempted Units Option

Maximum Attempted Transfer Unit Criteria

☒ Towards GPA

☒ No GPA

☒ Course Credit

☒ TC Units Adjust

☒ Test Credit

☒ Other Credit

Options to include various forms of Transfer Units in the Maximum Attempted Units value calculated by the SAP program

Max Attempted Units Rules

Personalize | Find | View All | First | 1-5 of 18 | Last

Academic Program	Academic Plan	Attempted MAX Units From	Attempted MAX Units To	SAP Status		
ACADM		113.001	135.000	MAXW	+	-
ACADM		135.001	999.999	MAXT	+	-
ACADM	CHEBCA	132.001	159.000	MAXW	+	-
ACADM	CHEBCA	159.001	999.999	MAXT	+	-
ACADM	CRMHSA	122.001	147.000	MAXW	+	-

Range of Maximum Attempted Units this test will apply to

SAP Status to be assigned if student meets these criteria

Course Exclusions Configuration

- College-specific list of all courses that should be excluded from the total Maximum Attempted Units value and designate them as “Remedial” or “ESL” Course Types
- Option to define a maximum number of units that can be excluded for “Remedial” and/or “ESL” Course Types
- This configuration is only utilized by the Maximum Attempted Units Test

Image: Course Exclusions configuration for the Maximum Attempted Units Test on Exclusions page

Navigation: Set Up SACR > Product Related > Financial Aid > Satisfactory Academic Progress > Define Set Up Criteria >> Exclusions tab

Course Exclusions

☒ Use Course Exclusions Activates the use of Course Exclusions (used in the Maximum Attempted Units Test only)

Max Units to Exclude

Max ESL Units to Exclude

Max Remedial Units to Exclude Maximum number of units that can be excluded from the total Maximum Attempted Units value, based on Course Type in the configuration below. (Blank means no limit.)

*Course ID	*Offer Nbr	*Course Type
062065	1	Remedial
062072	1	Remedial
062073	1	Remedial
062082	1	Remedial
062104	1	Remedial

Export list of Course Exclusions to spreadsheet for review

List of Courses to be excluded from the total Maximum Attempted Units value and categorized by Course Type

Course Type options (Remedial or ESL). These correspond to the Max Units to Exclude configurations.

💡 Colleges should maintain the Course Exclusions list as Remedial and/or ESL courses are added at the college. You can export the Course Exclusions list to a spreadsheet and compare against a list provided by your college's Registrar to identify any courses that may need to be added or adjusted.

⚠ Please remember to always add an effective dated row to your SAP setup prior to making any changes, even if it is just to change the Course Type on a course on the Exclusions tab.

Maximum Attempted Units on the Student SAP Page

- Located in the SAP Calculation Results section of the Maintain Student SAP Data page
- Displays the total Maximum Attempted Units value up to the term being evaluated
- Course Exclusions apply to this value, per local college configurations
- Displays information in the "Rule Range" fields if the student matches a Max Attempted Units Rule

Image: Maximum Attempted Units test results on Maintain Student SAP Data page

SAP Calculation Results									
Test	Used	Actual	Rule Range From	Rule Range To	Failed	Status	Severity	Exception Used	Term
Academic Standing	N		NA	NA	<input type="checkbox"/>			NA	
Maximum Attempted Units	Y	145.000	144.001	999.999	<input checked="" type="checkbox"/>	MAXT	70	N	NA
Maximum Attempted Terms	N				<input type="checkbox"/>			N	NA
Minimum Current GPA	Y	2.700			<input type="checkbox"/>	MEET	10	N	NA
Minimum Cumulative GPA	Y	3.030			<input type="checkbox"/>	MEET	10	N	NA
Current Earned Units	Y	3.000			<input type="checkbox"/>	MEET	10	N	NA
Cumulative Earned Units	Y	118.000			<input type="checkbox"/>	MEET	10	N	NA
Two Year GPA	N	3.030			<input type="checkbox"/>			N	NA

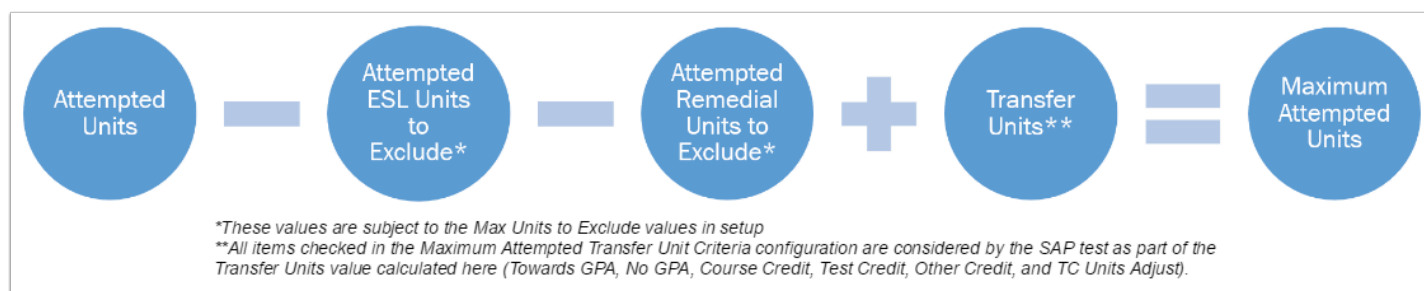
Maximum Attempted Units Test - Delivered Logic Flow

The Maximum Attempted Units Test configurations work in tandem with the Course Exclusions setup, so long as both are enabled. This test calculates the Maximum Attempted Units value following the logic as outlined below.

- Check that the Maximum Attempted Units Test is enabled
 - If** it is enabled, **then** proceed
 - If** it is not enabled, **then** skip test
- Retrieve the Total Enrolled Attempted Units from Student Enrollment (STDNT_ENRL)
- Determine total units from Student Enrollment in courses that are listed in the Course Exclusions of SAP setup
- Compare the total Enrolled ESL Units against the Max ESL Units to Exclude value, if Course Exclusions is enabled
 - If** the total Enrolled ESL Units is *greater than* the Max ESL Units to Exclude value, **then** the ESL units to exclude *is equal to* the Max ESL Units to Exclude value
 - If** the total Enrolled ESL Units is *less than* the Max ESL Units to Exclude value, **then** the ESL units to exclude *is equal to* the sum of all Enrolled ESL Units from the Course Exclusions list
 - If** the Max ESL Units to Exclude value is blank, **then** the Enrolled ESL units to exclude *is equal to* the sum of all Enrolled ESL Units from the Course Exclusions list
- Compare the total Remedial Units against the Max Remedial Units to Exclude value, if Course Exclusions is enabled
 - If** the total Enrolled Remedial Units is *greater than* the Max Remedial Units to Exclude value, **then** the Enrolled Remedial units to exclude *is equal to* the Max Remedial Units to Exclude value
 - If** the total Enrolled Remedial Units is *less than* the Max Remedial Units to Exclude value, **then** the Enrolled Remedial units to exclude *is equal to* the sum of all Enrolled Remedial Units from the Course Exclusions list

- c. **If** the Max Remedial Units to Exclude value is blank,
then the Enrolled Remedial units to exclude *is equal to* the sum of all Enrolled Remedial Units from the Course Exclusions list
6. Calculate the **Maximum Attempted Units**:
7. Total Enrolled Attempted Units (step 2) **minus** Enrolled ESL Units to Exclude (step 4) **minus** Enrolled Remedial Units to Exclude (step 5)
8. Calculate the total Transfer Units per the local configuration of the Maximum Attempted Transfer Unit Criteria
 - a. **If** the Towards GPA box is checked
then add the total Towards GPA Transfer Units from Student Term History (STDNT_CAR_TERM)
 - b. **If** the No GPA box is checked
then add the total No GPA Transfer Units from Student Term History (STDNT_CAR_TERM)
 - c. **If** the Course Credit box is checked
then add the total Course Credit Transfer Units from Student Term History (STDNT_CAR_TERM)
 - d. **If** the Test Credit box is checked
then add the total Test Credit Transfer Units from Student Term History (STDNT_CAR_TERM)
 - e. **If** the Other Credit box is checked
then add the total Other Credit Transfer Units from Student Term History (STDNT_CAR_TERM)
 - f. **If** the TC Units Adjust box is checked
then *subtract* the total TC Units Adjust Transfer Units from Student Term History (STDNT_CAR_TERM)
9. Calculate the **final Maximum Attempted Units** value by adding the Total Transfer Units from step 7 to the Enrolled Attempted Units in step 6
10. Compare the student's **Maximum Attempted Units** value against the ranges specified in the locally configured Max Attempted Units Rules
 - a. **If** the student data matches one of the rules,
then assign the corresponding SAP Status, per the local configuration, for the Maximum Attempted Units Test
 - b. **If** the student data does not match one of the rules,
then assign the Career Pass Default Status (configured on the Setup tab of the Define Set Up Criteria page) for the Maximum Attempted Units Test

Image: High-level visual representation of the delivered Maximum Attempted Units Test calculation of the Maximum Attempted Units value



i The Maximum Attempted Units Test was modified in the project [SAP #3: MAXT with Developmental Credits over 45](#). That customization resolved a [known Oracle bug](#) that would cause the Cumulative Attempted Units value to be a negative number. It also resolved issues with the Maximum ESL Units to Exclude and Maximum Remedial Units to Exclude configurations.

The Problem

Non-converted legacy data is manually entered by the colleges as transfer credit. This legacy data is not stored in the student's enrollment record. However, the Maximum Attempted Units Test is designed to exclude courses on the enrollment record; it does not exclude courses entered in as transfer credit. As a result, legacy courses at the college are not excluded from the final Maximum Attempted Units value, per the college's local configuration, which can cause students to inaccurately fail the Maximum Attempted Units Test, or at the very least have an inaccurate Maximum Attempted Units value.

The SAP program uses the following records in order to calculate the Maximum Attempted Units value:

- **Term History Cumulative Statistics (STDNT_CAR_TERM)** Used by the SAP program to count the total units for the Maximum Attempted Units Test.
- **Test Credit Extract View (TEST_EXTR2_VW)** Used by the SAP program to count the total units for the Maximum Attempted Units Test.
- **Other Credit Extract View (OTHR_EXTR2)** Used by the SAP program to count the total units for the Maximum Attempted Units Test.
- **Student Enrollment (STDNT_ENRL)** Used by the SAP program to determine the number of units to exclude based on the Course Exclusions configuration from the Cumulative Attempted Units value.

In the ctLink system, Legacy units are manually entered as transfer units. However, transfer units do not exist on the Student Enrollment (STDNT_ENRL) record, which is used when determining courses to exclude. This means that if a student took courses at the college while the college was still using the legacy system, then all those units are counted against the

student's Cumulative Attempted Units; they are not compared against the college's local Course Exclusions configuration.

The delivered functionality will not identify those units as having been attempted at the college, and therefore will not exclude them from the Maximum Attempted Units value as it has been configured for the college. This can cause students to meet their Maximum Attempted Units limit prematurely.

Student Example (The Problem)

In the unofficial transcript excerpts below for this student example, we can see a total of 8 attempted remedial units that should be excluded from the student's Maximum Attempted Units value. We can also see that these terms were prior to the college's conversion into ctcLink.

SUMMER 1992 (06/22/1992 - 09/11/1992)						
Course		Description	Attempted	Earned	Grade	Points
OFF	106	Word Proc Applications	3.000	0.000	W	0.000
OFF	214	Wordperfect On Ibm-Pc	5.000	5.000	3.3	16.500
READ	57	Individual Read Develop	3.000	3.000	CR	0.000
WRIT	93	Paragraph/Essay Writing	3.000	3.000	CR	0.000
Term GPA 3.300 Term Totals			Attempted 14.000	Earned 11.000	GPA Units 5.000	Points 16.500
FALL 1992 (09/21/1992 - 12/11/1992)						
Course		Description	Attempted	Earned	Grade	Points
BUSN	121	Practical Accounting	5.000	5.000	3.3	16.500
LEGAL	100	Legal Asst Profession	1.000	1.000	CR	0.000
LEGAL	101	Intro To Legal System	4.000	4.000	1.8	7.200
READ	91	Study Skills Modules	1.000	1.000	CR	0.000
Term GPA 2.633 Term Totals			Attempted 11.000	Earned 11.000	GPA Units 9.000	Points 23.700
WINTER 1995 (01/03/1995 - 03/17/1995)						
Course		Description	Attempted	Earned	Grade	Points
LEGAL	105	Contracts	3.000	3.000	2.8	8.400
LEGAL	106	Torts	3.000	3.000	3.5	10.500
LEGAL	205	Civil Litigation	3.000	3.000	3.4	10.200
MATH	82	Pre-Algebra	1.000	0.000	W	0.000
PE	104	Fitness Conditioning	1.000	0.000	W	0.000
PE	123	Weight Training	1.000	0.000	W	0.000
Term GPA 3.233 Term Totals			Attempted 12.000	Earned 9.000	GPA Units 9.000	Points 29.100

We have confirmed that these courses were not converted, and were manually entered as transfer units by viewing the Academics tab on the Student Services Center. Units are listed here as "From Transfer Credit".

Image: Academics tab of the Student Services Center (Student) page

Navigation: Campus Community > Student Services Ctr (Student) >> Academics tab

SUMMER 1992

Eligible to Enroll

No

Primary Program

PRFTC

Professional Technical

Academic Standing Status

Data unavailable

Level / Load

Academic Level - Projected

Freshman

Academic Level - Term Start

Freshman

Academic Level - Term End

Freshman

Approved Academic Load

Full-Time

Academic Load

No Unit Load

Classes

No classes for this term.

Quick Enrollment

Statistics

	From Transfer Credit	Cumulative Total
Units Toward GPA:		
Taken	5.000	5.000
Passed	5.000	5.000
In Progress		
Units Not for GPA:		
Taken	9.000	9.000
Passed	6.000	6.000
In Progress		
Transfer Units	11.000	11.000
GPA Calculation		
Total Grade Points	16.500	16.500
/ Units Taken Toward GPA	5.000	5.000
= GPA	3.300	3.300

If you have access to the Course Credits - Manual page for transfer credit evaluations in the Records and Enrollment module, then you will also be able to see confirmation that this is in fact legacy data. The key component here is that these transfer credits are being transferred from the college to that same college, which is how these are manually entered in ctclink to keep the record of a student's prior enrollment history at the college from the legacy data system.

Image: Example of legacy data manually entered on the transfer credits table

Navigation: Records and Enrollment > Transfer Credit Evaluation > Course Credits - Manual >> Transfer Course Entry tab

Transfer Course Entry | Course Credits by Term

Transfer Credit Model

Academic Career: UGRD Undergraduate College

Academic Institution: WA

*Model Nbr: 1

*Transcript Level: Print on Off

Target Information

*Academic Program: PRFTC Professional Tech

Academic Plan

Source Information

*Credit Source Type: External

External Org ID: 000142281

Data Source: School

Transfer Credit Term

*Articulation Term: 1925 1992 SUMMR

Posted

Incoming Course	Equivalent Course
*Seq# Group 1 1 Status: Posted Details Comments Year Subject Course Nbr Description Units Taken: 3.00 Grade Input: CR	Course ID: 109564 READ Offer Nbr: 1 57 Units Transferred: 3.000 Grading Scheme: ACA CrGrd Grading Basis: GRD Graded Official Grade: CR CR Repeat Code Designation <input checked="" type="checkbox"/> Include in FA Wl Stats

Note: These transfer credits are being transferred from the college to that same college, which is how these are manually entered in ctcLink to keep the record of a student's prior enrollment history at the college from the legacy data system.

When we look at this student's Maintain Student SAP Data page, we can see that they have failed the Maximum Attempted Units test, because their calculated Maximum Attempted Units value falls within the Max Attempted Units Rules range for this Academic Program/Academic Plan combination. As a result, their final SAP Status is 'MAXT', and they are no longer eligible for financial aid.

Upon further exploration, we learn that while 145.000 is their total attempted units, 8 of those units are considered remedial and should have been excluded from this number. However, these 8 units are on the transfer credit table as manually entered legacy data.

Image: Example student's inaccurate Maximum Attempted Units values prior to the customization

Navigation: Financial Aid > Satisfactory Academic Progress > Maintain Student SAP Data

Term 2233 SPRING 2023 Updated
Program PRFTC Professional Technical User ID
Plan ACTVCAPT Graphic Design AAS
Calc SAP Status MAXT Maximum TimeFrame Exceeded
Override SAP Status

Packaging Status Summary Meeting Satis Acad Progress [View Packaging Status Summary](#)
Comments

SAP Calculation Results

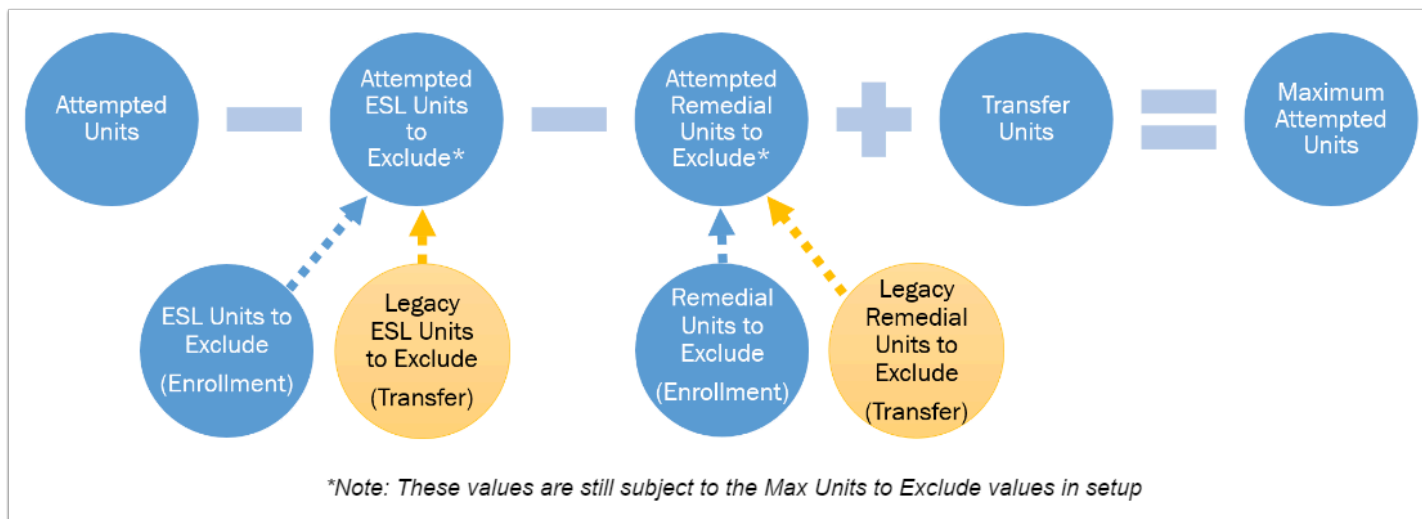
Test	Used	Actual	Rule Range From	To	Failed	Status	Severity	Exception Used	Term
Academic Standing	N		NA	NA	<input type="checkbox"/>			NA	
Maximum Attempted Units	Y	145.000	144.001	999.999	<input checked="" type="checkbox"/>	MAXT	70	N	NA
Maximum Attempted Terms	N				<input type="checkbox"/>			N	NA
Minimum Current GPA	Y	2.700			<input type="checkbox"/>	MEET			NA
Minimum Cumulative GPA	Y	3.030			<input type="checkbox"/>	MEET			NA
Current Earned Units	Y	3.000			<input type="checkbox"/>	MEET			NA
Cumulative Earned Units	Y	118.000			<input type="checkbox"/>	MEET	10	N	NA
Two Year GPA	N	3.030			<input type="checkbox"/>			N	NA

The Solution

Create a custom view to identify legacy units and corresponding course information added manually in ctcLink. Clone the delivered PeopleSoft Financial Aid SAP Application Engine (AE) for the Maximum Attempted Units Test. Modify the copied code to compare the custom view against additional delivered enrollment tables to pull the data points necessary to compare these legacy transfer units to the Course Exclusions configuration. Update the SAP AE Process Setup configuration page for each institution to point to the custom code.

High-Level Diagram of Customized Maximum Attempted Units Calculation

Image: High-level visual representation of the customized Maximum Attempted Units Test calculation of the Maximum Attempted Units value



Student Example (The Solution)

In the screenshot below, the same example student's SAP for Spring 2023 has been calculated again in an environment with the customization in place. The student is now meeting the Maximum Attempted Units Test, and as a result is also meeting SAP for the term. We can see that the Maximum Attempted Units value has updated to 137.000, as expected - the 8.000 legacy remedial units have been reduced from the 145.000 Maximum Attempted Units value.

Image: Example student's new Maximum Attempted Units Test outcome with the customization in place

Navigation: Financial Aid > Satisfactory Academic Progress > Maintain Student SAP Data

Student SAP

Term

2233

SPRING 2023

Program

PRFTC

Professional Technical

Plan

ACTVCAPT

Graphic Design AAS

Updated

User ID

Calc SAP Status

MEET

Meets SAP

Override SAP Status

Packaging Status Summary

Meeting Satis Acad Progress

View Packaging Status Summary

Comments

SAP Calculation Results


	Test	Used	Actual	Rule Range From To	Failed	Status	Severity	Exception Used	Term
Academic Standing		N		NA NA	<input type="checkbox"/>			NA	
Maximum Attempted Units	Y	137.000			<input type="checkbox"/>	MEET	10	N	NA
Maximum Attempted Terms	N				<input type="checkbox"/>			N	NA
Minimum Current GPA	Y	2.700			<input type="checkbox"/>	MEET			NA
Minimum Cumulative GPA	Y	3.030			<input type="checkbox"/>	MEET			NA
Current Earned Units	Y	3.000			<input type="checkbox"/>	MEET			NA
Cumulative Earned Units	Y	118.000			<input type="checkbox"/>	MEET	10	N	NA
Two Year GPA	N	3.030			<input type="checkbox"/>			N	NA

Steps in the Test Process

1. Review Maximum Attempted Units Test setup for your college

We recommend that all of the check boxes be checked in the **Max Attempted Transfer Unit Criteria** section in SAP Setup. By checking all of these boxes, you are allowing the SAP program to take all forms of transfer units and include them in the Maximum Attempted Units value calculation.

Please also review your college's Max Attempted Units Rules to ensure that they are in alignment with your college's posted SAP policy. Be sure to carefully review this list and ensure that there are no overlapping ranges for each Academic Program/Academic Plan combination. If the ranges overlap, then the SAP process will throw an error and stop processing.

 Always be sure to add a new effective dated row when making changes to SAP setup.


 Configuration changes made in the PQA test environment will **not** be migrated into the production environment.

Image: Maximum Attempted Units Test configurations on SAP Define Set Up Criteria 1 page

Navigation: Set Up SACR > Product Related > Financial Aid > Satisfactory Academic Progress > Define Set Up Criteria >> Criteria 1 tab

Maximum Attempted Units Test

☒ Use Max Attempted Units Test Activates the Maximum Attempted Units Test

Max Attempted Units Option

Maximum Attempted Transfer Unit Criteria

☒ Towards GPA ☒ No GPA ☒ Course Credit Options to include various forms of Transfer Units in the Maximum Attempted Units value calculated by the SAP program
☒ Test Credit ☒ Other Credit ☒ TC Units Adjust

Max Attempted Units Rules Personalize | Find | View All | 1-5 of 18 | First | Last

Academic Program	Academic Plan	Attempted MAX Units From	Attempted MAX Units To	SAP Status		
ACADM		113.001	135.000	MAXW	+	-
ACADM		135.001	999.999	MAXT	+	-
ACADM	CHEBCA	132.001	159.000	MAXW	+	-
ACADM	CHEBCA	159.001	999.999	MAXT	+	-
ACADM	CRMHSA	122.001	147.000	MAXW	+	-

Range of Maximum Attempted Units this test will apply to SAP Status to be assigned if student meets these criteria

2. Review Course Exclusions setup for your college

If your college offers ESL courses and they should not be included in the final Cumulative Attempted Units calculation, they will need to be added to the Course Exclusions list in your local SAP Setup.

1. Select the **Exclusions** tab
2. Select the **Spreadsheet** icon to download the full list of courses to exclude that are already configured for your college
3. Review the list and note what changes need to be made
 - Does the Course Type need to be changed to ESL or to Remedial?
 - Should the course be removed?
 - Should more courses be added? What Course Type should they have?
4. Review the Max Units to Exclude values for both ESL and Remedial
 - [greater than 0] - *all* units from courses with that Course Type will be excluded *up to* the maximum amount set here. Any units beyond that number *will* be included in the calculated total Cumulative Attempted Unites value
 - [blank] - *all* units from courses with that Course Type will be excluded from the calculated total Cumulative Attempted Units value
5. Update Course Exclusions for your college as needed

! Always be sure to add a new effective dated row when making changes to SAP setup.

! Configuration changes made in the PQA test environment will **not** be migrated into the production environment.

Image: Course Exclusions configuration for the Maximum Attempted Units Test on Exclusions page

Navigation: Set Up SACR > Product Related > Financial Aid > Satisfactory Academic Progress > Define Set Up Criteria >> Exclusions tab

The screenshot shows the 'Course Exclusions' configuration page. At the top, there is a section 'Course Exclusions' with a checkbox 'Use Course Exclusions' which is checked. A callout box points to this checkbox with the text: 'Activates the use of Course Exclusions in the Maximum Attempted Units Test only'. Below this is the 'Max Units to Exclude' section with two input fields: 'Max ESL Units to Exclude' and 'Max Remedial Units to Exclude' with the value '45.00'. A callout box points to these fields with the text: 'Maximum number of units that can be excluded from the total Maximum Attempted Units value, based on Course Type in the configuration below. (Blank means no limit.)'. The main part of the page is a table titled 'Course Exclusions' with columns: '*Course ID', '*Offer Nbr', 'EFUND', 'ELP', 'HORT', 'HUMAN', and '*Course Type'. The table contains five rows of data. A callout box points to the table with the text: 'List of Courses to be excluded from the total Maximum Attempted Units value and categorized by Course Type'. Another callout box points to the '*Course Type' column with the text: 'Course Type options (Remedial or ESL). These correspond to the Max Units to Exclude configurations.' There is also a callout box pointing to the table's toolbar with the text: 'Export list of Course Exclusions to spreadsheet for review'.

*Course ID	*Offer Nbr	EFUND	ELP	HORT	HUMAN	*Course Type
062065	1					Remedial
062072	1					Remedial
062073	1					Remedial
062082	1					Remedial
062104	1					Remedial

3. Define test scenarios

In Scope for Testing:

- Maximum Attempted Units Test
- Students with non-converted, manually entered legacy units for courses listed in the local college Course Exclusions configuration

Out of Scope for Testing:

- Other SAP Tests
- Students with converted legacy units – these are already being excluded as desired per the local college Course Exclusions configuration

Other Questions to Consider

- Do your college's configurations align with your college's posted SAP policy?
- Does this customization align with your college's SAP policy?
- Does this customization present new scenarios that need to be accounted for?
- Think of students that are often manually adjusted after SAP has been run – can they be resolved with this customization?

Recommended Test Scenarios

- Student with only enrolled courses to exclude
- Student with only legacy courses to exclude
- Student with both enrolled and legacy courses to exclude
- Student with no courses to exclude
- Student with ESL or Remedial or both Course Types to exclude
- Student who has exceeded the Max Remedial Units to Exclude value

4. Find test students

- Review the [Recommended Test Scenarios](#) section of this guide to ensure there are at least 2 to 3 students (although more than 3 is recommended) per scenario.
- Use [Query Viewer](#) or [Schedule Query](#) to run the query **QCS_FA_TEST_SAP6B_STDNTS** to capture students and relevant data for the test scenarios for this customization.
- Test for other data conditions beyond just those impacted by the customization itself to ensure that the program changes did not adversely affect other students' SAP Test results.
- If your college does not have a student that meets specific criteria you can work with the FA Support Team to determine if another college is covering this scenario or determine how to stage a student that meets those criteria.

Run query to find students for testing

The **QCS_FA_TEST_SAP6B_STDNTS** testing query selects students who have failed the Maximum Attempted Units Test and have manually entered legacy units that likely should be excluded from the Maximum Attempted Units value with the customization. In the query output, you can find the student ID, the SAP calculation term, what the calculated Maximum Attempted Units value is, and the units range that the student failed on.

Image: Example of test query output for identifying students to test with for SAP #6B

Navigation: Reporting Tools > Query > Query Viewer

QCS_FA_TEST_SAP6B_STDNTS - SAP6B - Test Students

*Institution


*SAP Term SAP Term calculated

Download results in : [Excel Spreadsheet](#) [CSV Text File](#) [XML File](#) (1 kb)

View All First 1-12 of 12 Last

Row	ID	Institution	Career	SAP Term	Maximum Attempted Units	Attempted MAX Units From	Attempted MAX Units To	MAX Attempted Unit Test In Use	Max Attempted Units SAP Status	Attempted Units Failed?	Exception Used	SAP Evaluation Term
1	20	WA	UGRD	2233	210.000	135.001	999.999	Y	MAXT	Y	N	2231
2	20	WA	UGRD	2233	145.000	144.001	999.999	Y	MAXT	Y	N	2231
3	20	WA	UGRD	2233	150.000	135.000	999.999	Y	MAXT	Y	N	2231
4	20	WA	UGRD	2233	165.000	135.001	999.999	Y	MAXT	Y	N	2231
5	20	WA	UGRD	2233	192.000	135.000	999.999	Y	MAXT	Y	N	2231
6	20	WA	UGRD	2233	174.000	135.001	999.999	Y	MAXT	Y	N	2221
7	20	WA	UGRD	2233	180.000	135.000	999.999	Y	MAXT	Y	N	2221
8	20	WA	UGRD	2233	167.000	135.000	999.999	Y	MAXT	Y	N	2231
9	20	WA	UGRD	2233	209.000	137.001	999.999	Y	MAXT	Y	N	2231
10	20	WA	UGRD	2233	222.000	140.001	999.999	Y	MAXT	Y	N	2231
11	20	WA	UGRD	2233	150.000	143.001	999.999	Y	MAXT	Y	N	2227
12	20	WA	UGRD	2233	174.000	135.001	999.999	Y	MAXT	Y	N	2223

Source term for SAP calculation

 This query is for testing only and will not be migrated to the production environment.

If your college does not currently use the Maximum Attempted Units Test

The **QCS_FA_TEST_SAP6B_STDNTSNOMAXT** testing query selects students who have manually entered legacy units that likely should be excluded from the Maximum Attempted Units value with the customization. This query does not look for students who have failed the Maximum Attempted Units Test, since there will not be any if your college has not had that test enabled on the SAP Define Set Up Criteria page.

If your college has not been using the Maximum Attempted Units Test, then you can expect your query results to look like the below screenshot, where there are no values in the columns to the right of the "SAP Term" column. the "MAX Attempted Unit Test In Use" column will display an "N" for students whose records you are reviewing where the Maximum Attempted Units Test was not enabled or calculated at the time that SAP was processed for that term.

Image: Example of test query output for identifying students to test with for SAP #6B if your college does not currently use the Maximum Attempted Units test

Navigation: Reporting Tools > Query > Query Viewer

QCS_FA_TEST_SAP6B_STDNTSNOMAXT - SAP6B - Test Students no MAXT

*Institution *Term **SAP Term calculated**

[View Results](#)

Download results in : [Excel Spreadsheet](#) [CSV Text File](#) [XML File](#) (15 k)

View All First 1-100 of 115 Last

Row	ID	Institution	Career	SAP Term	Maximum Attempted Units	Attempted MAX Units From	Attempted MAX Units To	MAX Attempted Unit Test In Use	Max Attempted Units SAP Status	Attempted Units Failed?	Exception Used
1	20	WA	UGRD	2233	0.000	0.000	0.000	N		N	N
2	20	WA	UGRD	2233	0.000	0.000	0.000	N		N	N
3	20	WA	UGRD	2233	0.000	0.000	0.000	N		N	N
4	20	WA	UGRD	2233	0.000	0.000	0.000	N		N	N
5	20	WA	UGRD	2233	0.000	0.000	0.000	N		N	N
6	20	WA	UGRD	2233	0.000	0.000	0.000	N		N	N
7	20	WA	UGRD	2233	0.000	0.000	0.000	N		N	N
8	20	WA	UGRD	2233	0.000	0.000	0.000	N		N	N
9	20	WA	UGRD	2233	0.000	0.000	0.000	N		N	N
10	20	WA	UGRD	2233	0.000	0.000	0.000	N		N	N
11	20	WA	UGRD	2233	0.000	0.000	0.000	N		N	N
12	20	WA	UGRD	2233	0.000	0.000	0.000	N		N	N
13	20	WA	UGRD	2233	0.000	0.000	0.000	N		N	N
14	10	WA	UGRD	2233	0.000	0.000	0.000	N		N	N
15	20	WA	UGRD	2233	0.000	0.000	0.000	N		N	N

"N" indicates that the Maximum Attempted Units Test was not enabled when these SAP results were produced

These values will be 0.000 or "N" if the Maximum Attempted Units Test was not enabled when these SAP results were produced

⚠ This query is for testing only and will not be migrated to the production environment.

5. Run query for information on manually entered legacy data

The **QCS_FA_TEST_SAP6B_LEGACY_DATA** testing query selects the manually entered legacy units for the prompted Institution on the transfer credit table prior to the SAP term being calculated for the student ID entered into the prompt.

- Review the query for any courses that are remedial or ESL and should be excluded.
- Take note of the Subject and Catalog values for these courses.
- Take note of the Unit Taken value, as this is the amount that the Maximum Attempted Units value should be reduced by.

In the screenshot below, four rows have been highlighted as example courses that most likely be configured as Remedial in the Course Exclusions configuration. If these courses do exist on that setup, then we can expect that the customization will reduce the Maximum Attempted Units value by the sum of the units in these rows *up to* the Max Units to Exclude values in the configuration.

Image: Example of test query output for reviewing manually entered legacy transfer data

Navigation: Reporting Tools > Query > Query Viewer

QCS_FA_TEST_SAP6B_LEGACYDATA - SAP6B - Legacy Data

Institution WA

Career Undergraduate

Term 2233

ID 20

View Results

SAP Term calculated

Test student ID

Key information for determining how many legacy units should be excluded from the Maximum Attempted Units value

Download results in: Excel Spreadsheet CSV Text File XML File (11 kb)

First 1-42 of 42 Last

Row	ID	Institution	Career	Term	Class Nbr	Course ID	Repeat	Source	Subject	Catalog	Grade In	Units Taken	Grid ID/Unit	Grading	Equiv Crs	Allowed Unit Comp	Repeatable	Attempt	
1	20	WA	UGRD	1927	3	103773		TRNS_CRS	BUSN	121	3.3	5.00	3.300 GRD	05007	05007	5.00	1 N	1	
2	20	WA	UGRD	1955	2	103821		TRNS_CRS	BUSN	216	3.3	4.00	3.300 GRD	103821	5.00	1 N	1		
3	20	WA	UGRD	1941	1	108049		TRNS_CRS	CSCI	105	3.0	3.00	3.000 GRD	108049	3.00	1 N	1		
4	20	WA	UGRD	1927	2	109902		TRNS_CRS	LEGAL	100	CR	1.00	2.000 GRD	05209	05209	5.00	1 N	1	
5	20	WA	UGRD	1927	1	109904		TRNS_CRS	LEGAL	101	1.8	4.00	1.800 GRD	109904	3.00	1 N	1		
6	20	WA	UGRD	1951	2	109910		TRNS_CRS	LEGAL	105	2.8	3.00	2.800 GRD	109910	5.00	1 N	1		
7	20	WA	UGRD	1951	5	109912		TRNS_CRS	LEGAL	106	3.5	3.00	3.500 GRD	109912	5.00	1 N	1		
8	20	WA	UGRD	1953	4	109916		TRNS_CRS	LEGAL	119	3.3	3.00	3.300 GRD	109916	5.00	1 N	1		
9	20	WA	UGRD	1935	1	109922	REXP	TRNS_CRS	LEGAL	140	2.4	5.00	2.400 GRD	109922	5.00	1 N	1		
10	20	WA	UGRD	1945	15	109922	REXP	TRNS_CRS	LEGAL	140	3.5	3.00	3.500 GRD	109922	5.00	1 N	2		
11	20	WA	UGRD	1937	3	109928		TRNS_CRS	LEGAL	199	2.9	3.00	2.900 GRD	109928	5.00	1 N	1		
12	20	WA	UGRD	1941	2	109930		TRNS_CRS	LEGAL	200	1.5	3.00	1.500 GRD	109930	5.00	1 N	1		
13	20	WA	UGRD	1947	2	104177		TRNS_CRS	LEGAL	204	3.0	3.00	3.000 GRD	104177	3.00	1 N	1		
14	20	WA	UGRD	1951	1	104178		TRNS_CRS	LEGAL	205	3.4	3.00	3.400 GRD	104178	3.00	1 N	1		
15	20	WA	UGRD	1943	1	104180		TRNS_CRS	LEGAL	211	2.8	3.00	2.800 GRD	104180	5.00	1 N	1		
16	20	WA	UGRD	1953	2	104182		TRNS_CRS	LEGAL	213	0.7	3.00	0.700 GRD	104182	3.00	1 N	1		
17	20	WA	UGRD	1943	2	104183		TRNS_CRS	LEGAL	215	W	3.00	0.000 GRD	104183	3.00	1 N	1		
18	20	WA	UGRD	1953	1	104184		TRNS_CRS	LEGAL	220	CR	3.00	2.000 GRD	104184	5.00	1 N	1		
19	20	WA	UGRD	1955	1	109936		TRNS_CRS	LEGAL	240	3.8	4.00	3.800 GRD	109936	5.00	1 N	1		
20	20	WA	UGRD	1953	3	104190		TRNS_CRS	LEGAL	270	W	5.00	0.000 GRD	104190	5.00	1 N	1		
21	20	WA	UGRD	1951	4	108379		TRNS_CRS	MATH	82	W	1.00	0.000 GRD	108379	5.00	1 N	1		
22	20	WA	UGRD	1925	3	104387		TRNS_CRS	OFF	106	W	3.00	0.000 GRD	104387	3.00	1 N	1		
23	20	WA	UGRD	1941	3	104411		TRNS_CRS	OFF	162	3.7	5.00	3.700 GRD	104411	5.00	1 N	1		
24	20	WA	UGRD	1925	4	104439		TRNS_CRS	OFF	214	3.3	5.00	3.300 GRD	104439	5.00	1 N	1		
25	20	WA	UGRD	1947	3	104442		TRNS_CRS	OFF	217	3.6	5.00	3.600 GRD	05062	05062	5.00	1 N	1	
26	20	WA	UGRD	1937	4	104444		TRNS_CRS	OFF	219	3.6	5.00	3.600 GRD	104444	5.00	1 N	1		
27	20	WA	UGRD	1951	3	107585		TRNS_CRS	PE	104	W	1.00	0.000 GRD	107585	1.50	1 N	1		
28	20	WA	UGRD	1937	2	107590		TRNS_CRS	PE	110	W	1.00	0.000 GRD	107590	1.00	1 N	1		
29	20	WA	UGRD	1937	1	110412		TRNS_CRS	PE	114	3.5	1.00	3.500 GRD	110412	1.00	1 N	1		
30	20	WA	UGRD	1951	12	110416		TRNS_CRS	PE	123	0.0	1.00	0.000 GRD	110416	1.00	1 N	2		
31	20	WA	UGRD	1933	4	110416		TRNS_CRS	PE	123	3.7	1.00	3.700 GRD	110416	1.00	1 N	1		
32	20	WA	UGRD	1931	3	107614		TRNS_CRS	PE	134	3.4	1.00	3.400 GRD	107614	1.00	1 N	1		
33	20	WA	UGRD	1943	3	107690		TRNS_CRS	PE	223	W	1.00	0.000 GRD	107690	1.00	1 N	1		
34	20	WA	UGRD	1931	1	108902		TRNS_CRS	POLS	120	3.1	5.00	3.100 GRD	05211	05211	5.00	1 N	1	
35	20	WA	UGRD	1933	1	108936		TRNS_CRS	POLS	295	3.3	5.00	3.300 GRD	108936	5.00	1 N	1		
36	20	WA	UGRD	1933	2	109008		TRNS_CRS	PSYCH	120	3.3	5.00	3.300 GRD	109008	5.00	1 N	1		
37	20	WA	UGRD	1925	1	109554		TRNS_CRS	READ	57	CR	3.00	2.000 GRD	109554	5.00	1 N	1		
38	20	WA	UGRD	1927	4	109573		TRNS_CRS	READ	91	CR	1.00	2.000 GRD	109573	5.00	1 N	1		
39	20	WA	UGRD	1947	1	103243		TRNS_CRS	SPEECH	100	3.2	5.00	3.200 GRD	05098	05098	5.00	1 N	1	
40	20	WA	UGRD	1925	2	103350		TRNS_CRS	WRIT	93	CR	3.00	2.000 GRD	103350	3.00	1 N	1		
41	20	WA	UGRD	1931	2	109660		TRNS_CRS	WRIT	101	3.8	5.00	3.800 GRD	05149	05149	5.00	1 N	1	
42	20	WA	UGRD	1933	3	109662		TRNS_CRS	WRIT	105	3.3	5.00	3.300 GRD	06038	06038	5.00	1 N	1	



This query is for testing only and will not be migrated to the production environment.

6. Compare legacy units to Course Exclusions setup

Review your college's Course Exclusions setup to confirm that you have accounted for all legacy courses on the student's query output that should be excluded from the final Maximum Attempted Units value calculation.

Image: Course Exclusions configuration for the Maximum Attempted Units Test on Exclusions page

Navigation: Set Up SACR > Product Related > Financial Aid > Satisfactory Academic Progress > Define Set Up Criteria >> Exclusions tab

Course Exclusions

☒ Use Course Exclusions

Max Units to Exclude

Max ESL Units to Exclude

Max Remedial Units to Exclude

Take note of the Max Units to Exclude values – these apply to both the legacy units and the student's enrollment data in ctcLink

Course Exclusions Personalize | Find | View All | First 1-5 of 66 Last

*Course ID	*Offer Nbr			*Course Type		
062065	<input type="text" value="1"/>	EFUND	48	Remedial		
062072	<input type="text" value="1"/>	ELP	60	Remedial		
062073	<input type="text" value="1"/>	ELP	63	Remedial		
062082	<input type="text" value="1"/>	HORT	86	Remedial		
062104	<input type="text" value="1"/>	HUMAN	11	Remedial		

Export the list of courses to exclude to an Excel sheet for looking up courses

7. Process SAP

7a. Manually build SAP for test student

1. Open the Maintain Student SAP Data page for your test student.
Navigation: Financial Aid > Satisfactory Academic Progress > Maintain Student SAP Data
2. Note the Maximum Attempted Units value on the SAP row that Enter the same SAP term and process date that you are testing
3. Set SAP Term and select Calculate button (QRG - [9.2 Calculating SAP Per Student](#))
4. Note whether or not a new row was added with updated values for the Maximum Attempted Units Test
5. Confirm Maximum Attempted Units value has updated to the expected amount
6. If the Maximum Attempted Units value isn't as expected
 - a. Double check the legacy units for any other courses that might be on the Course Exclusions list
 - b. Check to see if the ESL/Remedial Max Units to Exclude has been exceeded by other courses the student has attempted that are not legacy units

Image: Example student's new Maximum Attempted Units Test outcome with the customization in place

Navigation: Financial Aid > Satisfactory Academic Progress > Maintain Student SAP Data

Student SAP

Term 2233 SPRING 2023 Updated
 Program PRFTC Professional Technical User ID
 Plan ACTVCAPT Graphic Design AAS
 Calc SAP Status MEET Meets SAP
 Override SAP Status

Packaging Status Summary Meeting Satis Acad Progress [View Packaging Status Summary](#)

Comments

SAP Calculation Results

Test	Used	Actual	Rule Range From	Rule Range To	Failed	Status	Severity	Exception Used	Term
Academic Standing	N		NA	NA	<input type="checkbox"/>			NA	
Maximum Attempted Units	Y	137.000			<input type="checkbox"/>	MEET	10	N	NA
Maximum Attempted Terms	N				<input type="checkbox"/>			N	NA
Minimum Current GPA	Y	2.700			<input type="checkbox"/>	MEET	10	N	NA
Minimum Cumulative GPA	Y	3.030			<input type="checkbox"/>	MEET	10	N	NA
Current Earned Units	Y	3.000			<input type="checkbox"/>	MEET	10	N	NA
Cumulative Earned Units	Y	118.000			<input type="checkbox"/>	MEET	10	N	NA
Two Year GPA	N	3.030			<input type="checkbox"/>			N	NA

The new Maximum Attempted Units value has been updated to the anticipated amount

7b. Run SAP in batch or Report Mode

1. Open the "Process SAP" batch processing page
Navigation: Financial Aid > Satisfactory Academic Progress > Process SAP
2. Set the desired Academic Institution, Academic Career, and Term (QRG - [9.2 Process SAP in Batch](#))
3. Uncheck the box for "Don't Run If SAP Status Exists" is unchecked. - For testing, we want the batch SAP Process to update students whose Maximum Attempted Units Tests have already been processed previously to see the outcome in a batch situation with the customization in place.
4. Select the option "Any Calculation Value Change" - Maximum Attempted Units values may be updated by the customization, but still not have an impact on the final SAP Status outcome
5. Select **Run** and **OK**
6. Review the Process Monitor and confirm there are no unexpected or odd error messages (QRG - [Process Scheduler/Process Monitor](#))
7. Review the SAP Report ([Review Report Data section of the 9.2 Process SAP in Batch QRG](#))
8. Review some students with updated Maximum Attempted Units Test results to confirm that they have calculated correctly
9. Ensure that other SAP tests and business processes for your college are not impacted by this customization
10. Spot-check SAP report for anything that looks out of the ordinary

Image: Example of Run Control settings for the Process SAP batch process

Navigation: Financial Aid > Satisfactory Academic Progress > Process SAP

Process SAP

Run Control ID: SBCTC_PROCESS_SAP_ALH Report Manager Process Monitor **Run**

Population Selection

☐ Population Selection

Input Parameters

*Academic Institution: WA Highline College

*Academic Career: UGRD Undergraduate

Term: 2233 SPRING 2023

Selection Criteria: Standard SAP Selection

*Processing Option: Update and Report

☒ Update using most recent evaluation term (Pass 2)

☐ Skip Status and Actions

☐ Don't Run If SAP Status Exists

Update Options

☐ Calc SAP Status Change Only

☒ Any Calculation Value Change

☐ Student Override

Student Override

ID	Name
1	

Be sure this box is unchecked. For testing, we want the batch SAP Process to update students whose Maximum Attempted Units Tests have already been processed previously to see the outcome in a batch situation with the customization in place.

Be sure to select this option, as Maximum Attempted Units values may be updated by the customization, but still not have an impact on the final SAP Status outcome.

8. Verify Your Test Outcomes


Success Examples

Test/Scenario	Expected Outcome
Student with only legacy courses to exclude	The Maximum Attempted Units value will be updated by the customization to exclude those Remedial and/or ESL courses that were manually entered up to the defined Max Units to Exclude values in the Course Exclusions configuration.
Student with only enrolled courses to exclude	The Maximum Attempted Units value will not be updated by the customization. This value has already been calculated correctly by the Maximum Attempted Units Test based on your college's configurations at the time that SAP was processed for the student and term.
Student with both enrolled and legacy courses to exclude	The Maximum Attempted Units value will be updated by the customization to exclude those Remedial and/or ESL courses that were manually entered up to the defined Max Units to Exclude values in the Course

Test/Scenario	Expected Outcome
	Exclusions configuration.
Student with no courses to exclude	The Maximum Attempted Units value will not be updated by the customization. This value has already been calculated correctly by the Maximum Attempted Units Test based on your college's configurations at the time that SAP was processed for the student and term.
Student with ESL or Remedial or both Course Types to exclude	The Maximum Attempted Units value is calculated by excluding both Course Types in the Course Exclusions configuration, whether or not this test scenario has been impacted by the customization.
Student who has exceeded the Max Remedial Units to Exclude value	The Maximum Attempted Units value is only reduced by the maximum value set in the Max Units to Exclude configuration value for that Course Type. If the Max Units to Exclude value for the Course Type is blank, then any course on the student's record configured with that Course Type on the Course Exclusions configurations will be excluded from the final Maximum Attempted Units value.

Failure Examples

- Students with an incorrect Maximum Attempted Units value who have manually entered legacy courses to be excluded that exist on the most current effective dated row in the Course Exclusions setup
- Unexpected error message when selecting the Calculate button on the Student SAP page (including SQL error messages)
- Unexpected error messages in Process Monitor (for the Process SAP batch process)

 If the student's SAP won't calculate, you may need to check the student's FA Term and make sure that it has an Active row. (QRG: [9.2 Building an FA Term](#))

Other Useful Pages

The following pages can be used as aids in understanding and calculating the student's expected Maximum Attempted Units value.



Please note that these pages are tied to the Records and Enrollment Module. It is possible that you do not have access to these pages. If you would like access to them for the sake of testing, please reach out to your college's Local Security Administrator (LSA) or Caitlin Stein cstein@sbctc.edu in order to update your security in the CS PQA test environment for testing purposes.

Student Services Center (Student) Academics tab

- The Academics tab in the Student Services Center (Student) page can be used to review courses and unit values at a college by term and program.
- Courses will not be listed for units labeled as "Transfer Credit". They will need to be verified using the Legacy Data test query output.

QRG: [Viewing Student Information](#)

Image: Academics tab in the Student Services Center (Student) to review courses and unit values at a college.

Navigation: Campus Community > Student Services Ctr (Student) >> Academics tab

Example of Student Services Center with transferred units on a term

SUMMER 1995

Eligible to Enroll No

Primary Program PRFTC Professional Technical

Academic Standing Status Data unavailable

▼ Level / Load

Academic Level - Projected Sophomore

Academic Level - Term Start Sophomore

Academic Level - Term End Sophomore

Approved Academic Load Full-Time

Academic Load No Unit Load

▼ Classes

No classes for this term.

Quick Enrollment

▼ Statistics

Attempted units for the term entered as transfer credit

	From Transfer Credit	Cumulative Total
Units Toward GPA:		
Taken	9.000	109.000
Passed	9.000	109.000

Image: Academics tab in the Student Services Center (Student) to review courses and unit values at a college.

Navigation: Campus Community > Student Services Ctr (Student) >> Academics tab

Example of Student Services Center with enrolled units on a term

WINTER 2023

Eligible to Enroll Yes
Primary Program ACADM Academic
Academic Standing Status Good Standing as of 2023-04-11

▼ Level / Load

Academic Level - Projected Sophomore
Academic Level - Term Start Sophomore
Academic Level - Term End Sophomore
Approved Academic Load Full-Time
Academic Load Less than Half-Time

▼ Classes

Student's course information for the term

✓ Enrolled ⓧ Dropped ⚠ Wait Listed

Class	Description	Units	Grading	Grade	Status
BSTEC 105-1YCF (36158)	Intro to Computers & Windows (Lecture)	3.00	Graded		ⓧ
COL 101-BCF6 (39974)	Strengthening Navigation (Lecture)	3.00	Graded	2.7	✓

Quick Enrollment

▼ Statistics

Attempted units for the term entered on the student's enrollment record

	From Enrollment	Cumulative Total
Units Toward GPA:		
Taken	3.000	118.000
Passed	3.000	118.000

Unofficial Transcript

- Use to view all courses listed on the student's transcript.
- Does not indicate if the course was manually entered legacy transfer data.
- Total attempted units value can be found on the last page. This is a Records and Enrollment calculation, and does not reference the SAP Course Exclusions configurations. In other words, this value is the total attempted units value prior to any remedial or ESL courses have been excluded.

QRG: [View and Print a Student Transcript](#)

Image: *Transcript Request Header tab on the Request Transcript Report page*

Navigation: Records and Enrollment > Transcripts > Request Transcript Report >> Transcript Request Header tab

Transcript Request Header | Transcript Request Detail | Report Messages

Report Request Nbr 002899988 Request Date 10/25/2023 User ID CTC_AHOOVER

Request Attributes

*Institution WA College

*Transcript Type UNOFF Unofficial Transcript

☐ Freeze Record

☒ Override Service Indicator

Number of Copies 1

Future Release Immediate Processing

Academic Career

Term

Print Date 10/25/2023

Request Reason

☐ Cancel Request

Set "Transcript Type" to "UNOFF"

Check box to "Override Service Indicator"

Image: Transcript Request Detail tab on the Request Transcript Report page displaying transcripts that have been generated

Navigation: Records and Enrollment > Transcripts > Request Transcript Report >> Transcript Request Detail tab

Transcript Request Header | Transcript Request Detail | Report Messages

Report Request Nbr 002899988 Completed

Transcript Type UNOFF Unofficial Transcript

Process Request

Print

Report Manager

*Seq Nbr	*ID	Name	Number of Copies	Send To	View Report	+	-
1	20	S	1	Send To	View Report	+	-
2	20	T	1	Send To	View Report	+	-
3	20	L			View Report	+	-
4	20	A			View Report	+	-
5	20	A	1	Send To	View Report	+	-
6	20	A	1	Send To	View Report	+	-
7	20	Y	1	Send To	View Report	+	-
8	20	G	1	Send To	View Report	+	-
9	20	N	1	Send To	View Report	+	-
10	20	B	1	Send To	View Report	+	-

Select the "View Report" link to open a PDF of the transcript for the desired student

Save Return to Search Previous in List Next in List Notify Add Update/Display

Transcript Request Header | Transcript Request Detail | Report Messages

Image: Unofficial transcript to view course information on the student's transcript

Navigation: Records and Enrollment > Transcripts > Request Transcript Report >> Transcript Request Detail tab >> View Report link

Example first page of an Unofficial Transcript

Page 1 of 4

Unofficial Transcript - Academic Career

Name: [Redacted]
Student ID: 20
Print Date: 10/25/2023

Degrees Awarded

Degree: Associate Degree - Professional Technical
Confer Date: 09/06/1995
Plan: Associate of Applied Science - Paralegal

SUMMER 1992 (06/23/1992 - 09/11/1992)

Course	Description	Attempted	Earned	Grade	Points
OFF 106	Word Proc Applications	3.000	0.000	W	0.000
OFF 214	Wordperfect On Sam-Pc	5.000	5.000	3.3	16.500
READ 87	Individual Read Develop	3.000	3.000	CR	0.000
WRIT 93	Paragraph/Essay Writing	3.000	3.000	CR	0.000
Term GPA	3.300 Term Totals	Attempted 14.000	Earned 11.000	GPA Units 9.000	Points 16.500

FALL 1992 (09/21/1992 - 12/11/1992)

Course	Description	Attempted	Earned	Grade	Points
BUSN 121	Practical Accounting	5.000	5.000	3.3	16.500
LEGAL 100	Legal Asst Profession	1.000	1.000	CR	0.000
LEGAL 101	Intro To Legal System	4.000	4.000	1.8	7.200
READ 91	Study Skills Modules	1.000	1.000	CR	0.000
Term GPA	2.633 Term Totals	Attempted 11.000	Earned 11.000	GPA Units 9.000	Points 23.700

WINTER 1993 (01/04/1993 - 03/19/1993)

Course	Description	Attempted	Earned	Grade	Points
PE 134	Water Exercise	1.000	1.000	3.4	3.400
POLS 120	American Government	5.000	5.000	3.1	15.500
WRIT 101	Principles of Writing	5.000	5.000	3.8	19.000
Term GPA	3.445 Term Totals	Attempted 11.000	Earned 11.000	GPA Units 11.000	Points 37.900

SPRING 1993 (03/29/1993 - 06/10/1993)

Course	Description	Attempted	Earned	Grade	Points
PE 123	Weight Training	1.000	1.000	3.7	3.700
POLS 295	Independent Study	5.000	5.000	3.3	16.500
PSYCH 120	Psych of Human Relations	5.000	5.000	3.3	16.500
WRIT 105	Research/Persuasive Writ	5.000	5.000	3.3	16.500
Term GPA	3.325 Term Totals	Attempted 16.000	Earned 16.000	GPA Units 16.000	Points 53.200

Transfer Course Credit - Manual

- Can be used to review manually entered legacy transfer unit information.
- Lists the term, subject, catalog number, and units taken.
- Transfer credits with an Academic Institution and External Org ID for the same college are legacy enrollment at the college that have been manually entered as transfer units.

QRG: [Convert Legacy Coursework section of the Manual Conversion of Legacy Records QRG](#)
(Review this section of the QRG to better understand the recommended manual conversion process.)

Image: *Example of manually entered legacy enrollment on a student's transfer credit record*

Navigation: Records and Enrollment > Transfer Credit Evaluation > Course Credit - Other >> Transfer Course Entry tab

Transfer Course Entry | Course Credits by Term

Transfer Credit Model

Academic Career: UGRD Undergraduate College

Academic Institution: WA

*Model Nbr: 1

*Transcript Level: Print on Off

Target Information

*Academic Program: PRFTC Professional Tech

Academic Plan:

Source Info

*Credit Source Type: External

External Org ID: 000142281

Data Source: School

Transfer Credit Term

*Articulation Term: 1925 1992 SUMMR

Incoming Course

Group: 1

*Seq#: 1

Status: Posted

Year:

Subject:

Course Nbr:

Description:

Units Taken: 3.00

Grade Input: CR

Equivalent Course

Course ID: 109564 READ

Offer Nbr: 1 57

Units Transferred: 3.000

Grading Scheme: ACA CrGrd

Grading Basis: GRD Graded

Official Grade: CR CR

Repeat Code:

Designation:

☒ Include in FA WI Stats

Student Term History, Cumulative Statistics tab

- Can be used to identify the total number of attempted units before Course Exclusions will be applied by the SAP process.

PeopleBooks - [Viewing Student Statistics](#) ("Viewing Cumulative Statistics for Multiple Terms" and "Calculating Cumulative Statistics Values" sections)

Image: Cumulative Statistics page for an example student

Navigation: Records and Enrollment > Student Term Information > Term History >> Cumulative Statistics tab

Term Statistics Cumulative Statistics Term Withdrawal Session Withdrawal Academic Standing >

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Academic Career: Undergraduate

Institution: College

Academic Level - Term End: Sophomore

Term 2231 WINTER 2023

Reset Cum Stats at Term Start: ☐

Enrollments

	Graded Units	Grade Points	GPA	Earned Units	In Progress Units	Units Taken Towards Acad Load	Units Earned Towards Acad Load	Units Taken For Audit
For GPA	9.000	17.600	1.960	9.000	0.000	9.000	9.000	0.000
Not For GPA	0.000			0.000	0.000			

Combine these two numbers to determine the total Attempted Units before Course Exclusions will be applied by the SAP process.

Total units taken as of the term on this row on the student's enrollment record for this college.

Transfer Credit

	Graded Units	Grade Points	GPA	Earned Units	Graded Transfer Units GPA / No GPA For Units Only	Units Adjustment	>>> Total Adjusted Transferred Units
For GPA	109.000	340.200	3.120	109.000	136.000	0.000	136.000
Not For GPA	27.000			11.000			

Total units taken on the student's transfer credit record entered for this college and up through this term. This is assuming that all boxes are checked for the Maximum Attempted Transfer Unit Criteria in your college's local Maximum Attempted Units Test configurations in SAP Define Set Up Criteria.

Combined (Enrollment + Transfer Credit Units)

	Graded Units	Grade Points	GPA	Earned Units	In Progress Units	Combined Earned Units GPA / No GPA Transfer Credit For Units Only	Transfer Credit Units Adjustment	>>> Total Cumulative Units
For GPA	118.000	357.800	3.030	118.000	0.000	129.000	0.000	129.000
Not For GPA	27.000			11.000	0.000			

Related Quick Reference Guide Materials

- [9.2 Calculating SAP Per Student](#)
- [9.2 Maintain Student SAP Data](#)
- [9.2 Process SAP in Batch](#)
- [9.2 Processing Standard SAP in Batch Video \(For Reference Only - Does Not Specifically Address Oracle Bug\)](#)
- [Manual Conversion of Legacy Records](#)

Security Matrix Mapping Information

! The information below provides those completing the Security Matrix Mapping templates with the Menus, Pages and Role names needed to execute the User Acceptance Testing relevant to this UAT guide.

Running SAP via Batch Process:

- MENU: Main Menu > Financial Aid > Satisfactory Academic Progress > Process SAP
- ROLE NAMES: ZC FA Funct Analyst and ZZ FA SAP Prcs

Running SAP via Maintain Student SAP Data page:

- MENU: Main Menu>Financial Aid>Satisfactory Academic Progress>Maintain Student SAP Data
- ROLE NAMES: ZC FA Funct Analyst and ZZ FA SAP Prcs