Entering External Education Information

Purpose: Use this document as a reference for entering external education information in ctcLink.

Audience: Transfer Credit Evaluator.

⊘ You must have at least one of these local college-managed security roles:

- ZD CS Education Data
- ZZ CS Education Data

If you need assistance with the above security roles, please contact your local college supervisor or IT Admin to request role access.

ℹ **Supporting Information:**

External Education is a global page. Changes as data updates can impact all colleges. **Changes made on this page can affect the student and other colleges.** The data on this page **does not belong to you or your college-- it belongs to the student!** If you don't want to transfer a particular course to your institution, don't transfer it!

If a student has repeated a course multiple times, you'll only see the student's first attempt listed on the External Education page. Be sure to review a PDF or hard copy of the student's official transcript and update the External Education page to add the student's additional course attempts.

It can take 24 hours or more for a Legacy transcript to make it to ctcLink (especially if your college has configured its Legacy transcripts to send only on certain days of the week). If you send yourself a Legacy transcript and don't see it the following day, wait another day or two before submitting a ticket.

Please ensure your Transcript Evaluator knows they MUST review the upload/ download version of the incoming transcript for repeated coursework for Legacy transcripts. Repeated coursework is seen as duplicate by the system and does not load into External Education. For ctcLink transcripts, review the Unofficial Transcript, accessible through the Advisor Center.

Additional Resources:

- **Producing Electronic Transcripts**
- **Identifying Electronic Transcripts Sent to Your Institution**
- **Transcript Troubleshooting 101**
- **Process Transfer Course Credits - Automated**

Queries:

You can track incoming ctcLink transcripts with **QCS_SR_CTC_TRANS_REQ**. You can find transcript requests entered by a user at your college using **QCS_SR_ELEC_TRANS_SENT.** There are no queries available to track incoming Legacy transcripts. Check the Upload/ Download file page to see if any Legacy transcripts have been sent to your college.

Note: Some service indicators can be used to prevent an Electronic Transcript Request from being processed. The Override Service Indicator checkbox can be used to bypass any service indicators that would prevent a transcript from being sent.

- To access the most up-to-date query information, visit **dataservicesmetalink.sbctc.edu.** Discover the best methods for finding queries and reports by visiting **Recommended Methods for Searching Queries and Reports.**

External Education Tab

Navigation: Records and Enrollment > Transfer Credit Evaluation > External Education

1. The **Education** search page displays.
2. Enter **Search Criteria** to identify your student.
3. Select **Search**

School Information

ℹ️ Institutions will be represented by their rows of data. The first section is the **School Information** section. In the grey bar, the number of entries on the page appears displayed to the far right (e.g., 1 of 2 or 2 of 2). To view all institutions attended, click the View All link.

Below the grey bar, you will find the **External Org ID**, the external data source.

School Details

ℹ️ The **School Details** row, when opened by clicking on the caret [>], contains the school location, country, and city if in the US. It also includes the type of school (Community, College, Secondary, etc.). This section is usually not open, but if you have questions about an institution's location, this would be the place to look.

Video Tutorial

The video below demonstrates the process actions described in the steps listed above. There is no audio included with this video. Select the play button to start the video.

View Tutorial Via Panopto

View the external link to **School Information**. This link will open in a new tab/window.

Checklist Item Update Checkbox

1. When you run Checklist Item Update Automated, select this check box to update the checklist relating to this external data (or transcript) row.
2. This checkbox is automatically selected when you save the page with "**Received**" as the Action field in the Transcript Status section.

Career Data

> ℹ️ Click on **View All** in the grey bar to display all the information about the respective school. The latest transcript will be at the bottom of the stack. A new Data Nbr is attached to each new row for an institution.

1. Complete the **Career Data** section.
   a. **Data Number**: The system automatically populates this field. When you input the first data item or row, it is numbered 1. After that, the system assigns sequential numbers to the following rows.
   b. **Career**: Choose the external Career from the drop-down list.
   c. **Term Type**: Select the Term Type used by an external organization. Examples of available values include *Quarter and Semester.*
   d. **External Term**: Enter the External Term to which this data pertains. For example, if this is a Fall transcript, enter or choose FALL in the External Term field. The available values are determined by what you enter in the Term Type field. You may leave this field blank until you are ready to enter the information for the transfer credit.
   e. **Term Year**: The Term Year relevant to this external data entry should be entered. If you are not ready to enter transfer credit information, leave this field blank.
   f. **Academic Level**: Identify the Academic Level of the person at the time the external data was gathered or issued. It is possible that this value is different from the current Academic Level.
   g. **From Date and To Date**: Provide the dates of attendance for the career data you entered.
   h. **Dismissed From School**: In the event that the student has been dismissed from the institution, check this box.

2. Select the **Comments** link. External Education is global; therefore, this is a page where you can see if your institution got your transcript. By requesting Default Comments via the **ctcLink CS Support** ticketing system, colleges can reduce the amount of time they spend manually entering the same information for each student.
3. Enter or look up a **Default Comment** and click **OK.** As soon as you enter a default comment, the Comment field is populated with default text, and you are able to provide additional information. It is also possible to add a comment without entering a default. The External Education Comments table defines the default comments.

Transcript Status

> ℹ️ These rows describe the status of each transcript request for each External Org ID. The entry in the **Action** field describes the need or receipt of the transcript.
>
> There are two types of actions: **Desired** and **Received**. The entry in the Transcript Type field will determine if the received transcript is **Official** or **Unofficial**. All entries will have a **Data Source**.

1. Complete the **Transcript Status** section.
   a. **Action**: Available values are **Desired** and **Received**. By default, **Desired** appears. For the transcript, select the appropriate action. In the case of your requested transcript, leave the value as Desired. Specify **Received** if the data relates to a transcript you have received. You can link the data to an application on the Application Materials page when the Action field is set to Received.
   b. **Transcript Date**: Enter the date on which the transcript was issued. The transcript date must not be later than the date of receipt.
   c. **Date Received**: Enter the date your office received the transcript. Transcripts cannot be received before the receipt date.
   d. **Transcript Type**: Choose a Transcript Type--**Official** or **Unofficial**. These values default from the User Defaults 3 page if defaults are defined there.
   e. **Transcript Status**: Select a Transcript Status--**Final**, **Incomplete**, **Mid-Year Report**, **Work in Progress**.
   f. **Data Source**: Choose the Data Source for this transcript. On the User Defaults 3 page, default values can be defined and used as defaults.
   g. **Data Medium**: Choose the format in which you received the transcript--**Hard Copy and EDI**. Default values are taken from the User Defaults 3 page if they are defined there.

Transcript Summary

> ℹ️ For this data, you can enter the GPA (grade point average), units, and rank details, which are either reported on transcripts, self-reported or obtained from another source. Multiple transcripts (or similar data) may be entered under an external organization.
>
> In the page layout, you can specify how you wish to represent a person's academic transcripts. It is possible to associate one or more summaries with a single transcript. Alternatively, you can enter a summary GPA, units, and rank for a person's entire

academic career. You can also insert rows to create individual summaries for different segments of a person's academic career. There are no limitations to the number of summary types you may enter. As a result of this structure, you are able to record the grade point average, rank, and units for each school year as well as the overall summary on one transcript.

1. Complete the **Transcript Summary** section.
   a. **Term**
      i. **Summary Type:** Select the type of summary for the external data. For example, you might select a summary of your entire high school transcript or just grade 12.
      ii. **External Term** and **Ext Year** (external year): Choose the External Term and Year that are relevant to the summary.
      iii. **Acad Level** (academic level): The student's academic level at the time this information was current may not be the student's current academic level. Typically, this value represents a summary of the student's academic year. You can choose which data to enter here, just as you can with the academic level for career information. In addition, you can determine how this academic-level data is related to the career data.

   b. **GPA Units**
      i. **GPA Type** (grade point average type)**:** Enter the GPA type used.
      ii. **Ext GPA** (external grade point average): Enter the External GPA based on the reported data. Alternatively, if you have defined external GPA values on the GPA Type Table page, you can prompt for these values here. In any case, you can enter the appropriate numerical GPA value.
      iii. **Conv GPA** (converted grade point average): When you define GPA conversion rules, the system will automatically convert the GPA based on the External GPA you provide. If you have not defined GPA conversion rules, the value you enter in the **External GPA** field is copied to the **Conv GPA** field.
      iv. **Completed**: Attempted and Completed fields are automatically populated based on the value in Attempted. This value may be overridden. If the number of units completed by the student differs from the number of units attempted, enter the number of units completed by the student.

   c. **Rank**
      i. **Class Rank and Class Size**: Enter the student's rank in the class and the number of students in the class.
      ii. **Percentile**: As a result of the values entered in the Class Rank and Class Size fields, the system automatically calculates the percentile.

External Subjects

> ℹ️ It is possible to report external subject information on a transcript, self-report, or report it from another source. It is beneficial to store this data in order to group subjects.
>
> In the event that your office is tracking subject area requirements but does not wish to enter or load all external courses that a student has taken, you may record course level, number of courses, units, external GPA, and converted GPA details about external subject areas. Defining external subject areas can be done on the External Subject Table page. You can add multiple rows to enter external subject data.

1. Complete the **External Subjects** section.
   a. **Course Level**: Determine the level of your course work in this area.
   b. **GPA Type (grade point average type)**: Choose a GPA type that corresponds to the school the student attended.
   c. **External GPA (external grade point average)**: Enter the student's external grade point average for this subject.
   d. **Converted GPA (converted grade point average)**: The system automatically converts the GPA if you define GPA conversion rules. If you have not specified GPA conversion rules, the GPA you enter in the **External GPA** field is copied into the **Converted GPA** field.

Courses and Degrees Tab

> ℹ️ This page records degrees received and dates. Data on this page has been manually entered and loaded into PeopleSoft.

1. Select the **Courses and Degrees** tab.

External Organization

External Course Defaults

1. Complete the **External Course Defaults section**. Select each tab in External Courses and verify or manually enter the required values. Some fields will auto-populate depending on what is set up for a specific External Org ID in external courses. The External Course Defaults are only needed when manually adding courses from a transcript to the External Education page. You are not required to enter information in the External Course Defaults section to minimize data entry.
   a. **Data Number**: Enter the data number from the External Education page if the courses you enter are linked to a transcript row. As soon as you exit this field, the system populates a number of the remaining fields with the data associated with this data

number. Do not enter a value in this field if the courses you enter are not linked to a data number.

b. **Term Type**: When Other is selected, the Begin Date and End Date fields are available. The External Term and Term Year fields become available if you choose any other value.

c. **Grading Scheme**: By selecting the grading scheme, you can convert the grading scheme of the external school to your own.

d. **Apply Defaults**: To populate the default values for the External Courses group box, click the Apply Defaults button. The defaults will be applied to all subsequent rows. It is only necessary to use the defaults once. Do not again select the Apply Defaults button if you enter another data number or change the default data. As you enter subsequent rows of course data, the new defaults will automatically be applied.

External Courses Tab

1. **School Subject**: Enter the school subject area for the course you are entering. If you have set up a course catalog for this school, you can prompt for valid values in this field. Enter the subject of a course catalog does not exist for this school.
2. **Course Nbr**: You can prompt for valid values in this field if you have created a course catalog for this school.
3. **Course Name**: This field is populated when you enter a course number. You can override this value. For example, if *Human Services* appears, you might add *Intro to Substance Abuse* as extra text. You can also add a course name if one is not automatically populated.

Grades Tab

1. Complete the **Subject Area** field.
2. **Units Taken**: Appear by default from the Units Taken field value in the External Course Defaults group box. When a value for External Units is defined on the School Course Classification page, the default value is overridden.
3. Complete the **Grading Scheme** field=CrGrd.
4. Complete the **Grading Basis** field=TRN. When manually converting a legacy record, change to appropriate Grading Basis (GRD, SUS, PNP, etc) with one exception: Leave Grading Basis TRN for any "I" grade that will not be lapsed.
5. Complete the **Grade In** field. Enter grades and grade changes. When you save grade changes, the **History link** appears.

Timeframe Tab

1. Choose a **Term Type from** the drop-down list:
   a. Full Year
   b. Miniterm
   c. Quarter
   d. Quinmester
   e. Semester

f. Trimester

2. Complete the **External Term** field.
3. Complete the **Term Year** field.

Details -1 to Details - 3 Tabs

1. Select the **Details-1** tab. Complete the **External Career** field. Complete the **Data Source**: It is necessary to enter the same Data Source on the Course Credits Automated page to fetch courses.
2. Select the **Details-2** tab. Complete the **Acad Level** and **Unit Type** field.
3. Select the **Details-3** tab. Complete the **Course Type, Course Level,** and **Academic Institution** field.

> ℹ️ If the **Academic Institution** field is not populated, you must select from the drop-down list and choose your college. This is a shared global page; therefore, you may notice that a different college has already been entered. This will result in you changing the Academic Institution from the other college to yours.
>
> If the other college did not process the transfer credit, it could impact it. For example, if you are from Olympic College and intend to accept the course to your institution, you would choose Olympic College from the Academic Institution drop-down list. This would not impact any transfer credit already processed by the other college. Business Process Decision: If the transcript was sent to another college, would you want a newly updated copy of the transcript sent directly to your college?

Transfer Credit/Comments

1. **Transfer Credit** checkbox is selected by default.
2. To enter comments about courses, click to access the **External Course Comments** page and enter comments about courses.
3. Select **Save** in the lower-left corner of the page.

External Degrees

> ℹ️ The transcript load process does not load external degrees into External Education. With this in mind, it is important to note that the External Education page is global so that colleges can change the External Degrees data. **External Degrees** allows staff to

enter information about student degrees associated with the specific External Org IDs. Select the "**Show All Columns**" icon to expand all columns.

1. Enter or look up the **Degree**, and the **Description** auto-populates. In the **Description** field, enter the Degree manually if it is unavailable.
2. **Degree Date:** A required field. Enter the date the Degree was earned. In the case of a degree in progress, enter the date the Degree will be awarded.
3. **Data Source:** Activate the drop-down menu and choose the appropriate Data Source.
4. **Degree Status:** Activate the drop-down menu and choose a status: **Complete**, **In Progress**, **Discontinued**, **Incomplete**. "Complete" displays by default.
5. **Honors Category:** If applicable, activate the drop-down menu and select the appropriate **Honors**.
6. **External Subject 1** and **External Subject 2:** Enter or look up an External Subject to associate with a school subject at your institution and the Field of Study populates. If the External Subject is unavailable, manually enter it in the Field of Study field.
7. **External Career:** Activate the drop-down menu and select the appropriate **External Career**.
8. **Data Number:** Select a Data Number from the drop-down menu. The **Data Number** is related to the Career Data panel on the External Education tab. In the External Degrees panel, you can enter a new transcript or source of information when you add a new row--associate the degree with the correct Data Number.
9. Select **Save** in the lower-left corner of the page.
10. Process complete.

The OAAP populates the following External Education fields:

1. **External Education Tab**

   Career Data Section

   • External Org ID
   • Term Year
   • Career - High School Diploma
   • Academic Level
   • "From and To" Date

   Transcript Summary Section

   • External Year
   • Academic Level - High School Diploma
   • Institution

   External Subjects

   • Institution

2. **Courses and Degrees Tab**

External Course Defaults

- Data Source
- Acad Level
- Institution
- Course Type
- External Career

Video Tutorial

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