

Articulation and Transfer Update

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Jim Ginzer

OACRAO Conference
November 2, 2006

Agenda

- Policy
- Implementation
- Tools
- Questions and Answers

Where were we a year ago when we talked with you?

- Policy and Implementation
 - Firming up Policy and Processes
 - Received Autumn HEI AN submissions
 - Received many Round 1 TAG Course Material submissions
 - Planning for Round 1 TAG Reviews
 - Starting Policy Redevelopment
- Articulation and Transfer Clearinghouse
 - Just starting institutional requirements reviews
 - No hardware or software
 - Draft Interface specifications

Focus Areas

- Policy work
- Course reviews
- Articulation and Transfer Clearinghouse development

Policy Redevelopment

- Chief Academic Affairs Officers and Provosts are reviewing materials now
- Articulation and Transfer Council members will receive materials before December 5 meeting
- Vote to accept or not at December 5 Articulation and Transfer Council

Translating Policy Into Operational Terms

- Developing Definitions of Terms
- Developing Business Rules
- Development of Articulation and Transfer Clearinghouse
- Planning Development of a Course Management and Tracking System

Other Changes

- Conceptual Model of Effective Dates and Respective Transfer Guarantee
- Public Use of the Ohio Articulation Numbers (OANs)

Definitions of Transfer Guarantee and Effective and Withdrawal Dates

10/30/06

	“Leap of Faith” Era Autumn 2005 Winter 2006 Spring 2006	Summer 2006	Autumn 2006
Effective Dates	All TAG Course Matches approved up to August 31, 2006 will be effective starting Autumn 2005		All TAG Course Matches approved September 1, 2006 and after will be effective the academic term following the term they were approved
Withdrawal Dates	The final term in which the course is considered a TAG course		
Definition of Transfer Guarantee	<p>TAG courses taken during this time will transfer and apply in one of the following ways: direct equivalency, major course credit (possibly a major elective) or degree credit</p> <p>Direct equivalencies of TAG Course Matches that are now in effect apply</p>	<p>TAG courses taken during this time will transfer and apply in one of the following two ways: Direct Equivalency or No Direct Equivalency and then the course will transfer and apply toward meeting a major course requirement or elective (not increasing degree requirements)</p> <p>Identified specific problem set of learning outcomes – corresponding TAG Course Match will count as meeting a degree requirement in addition to direct equivalency and major credit until the problem is resolved</p>	
HEI Submissions	HEI file contains all TAG Course Matches	HEI file contains only approved TAG Course Matches	
Method for Monitoring Process	<ul style="list-style-type: none"> - HEI Course Matches from Autumn 2005 - Listing of institution’s majors 		

Working toward a universal course equivalency classification system

TAG Course Validation Review

- 38 Transfer Articulation Guide (TAG) Faculty Panels Functioning
- # Courses Approved
- # Courses in Faculty Panel Work Lists
- # Course Without Institutional Course Material for Validation Review (A challenge!)
- December 31, 2006 Goal for Review of All Courses in Faculty Panel Work Lists.

Revised Course Material Submission Form

- Can identify specific type of change made
- Course Material Submission Information Still Needs to Be Better Connected to the Learning Outcomes.

**Ohio Articulation Number (OAN)
Course Submission Form**



College/University:	
Institutional OAN Matching Data	
Course matching is a (Click to Check one) :	
<input type="checkbox"/> New Match	
<input type="checkbox"/> Existing Match	
<input type="checkbox"/> Modified Match	
<input type="checkbox"/> Renumbered Course (Renumbering only - no other changes)	
<input type="checkbox"/> Course Credit Hour Change Credit hour change only - no other changes)	
Proposed effective year and term of Match (i.e. Final effective date will depend on actual approval of match by faculty panel. Effective Year and Term is the first term in which students taking the course will receive matching credit.)	
20 ____ Academic Year	<input type="checkbox"/> Summer <input type="checkbox"/> Winter <input type="checkbox"/> Autumn <input type="checkbox"/> Spring

Course Submitted (Title & Course Number) <small>(Note: The course number must be exactly what will appear on a student's transcript.)</small>	
Ohio Articulation Number	

Course _____ of a _____ Course OAN Matching.

Name and title of individual submitting on behalf of the college/university

Name:		Title:	
-------	--	--------	--

Address	
E-mail	
Phone	
Fax	

How will the ongoing backlog of course material awaiting approval by faculty panels be addressed?

- We recognize that a substantial amount of review work remains for the faculty panels. Our objective to clear the backlog is December 31, 2006.
- To reach this goal it will require the full cooperation of all the institutions to have their TAG course information submitted in a timely fashion and for the faculty review panels to complete their reviews as quickly as possible.
- In addition, plans are underway to develop a new TAG course approval and tracking system by the Regents staff.

What timeline should I follow when requesting approval of a course for inclusion in a TAG?

- Considering the submissions of new courses for TAG inclusion, our goal is to work toward a timeline as follows:
 - Submit Course Material: Start of Term 1
 - Faculty Panels Review Submitted Courses: During Term 1
 - Approved course is effective: Start of Term 2
 - Approved course is matched for transcript processing: Term 3

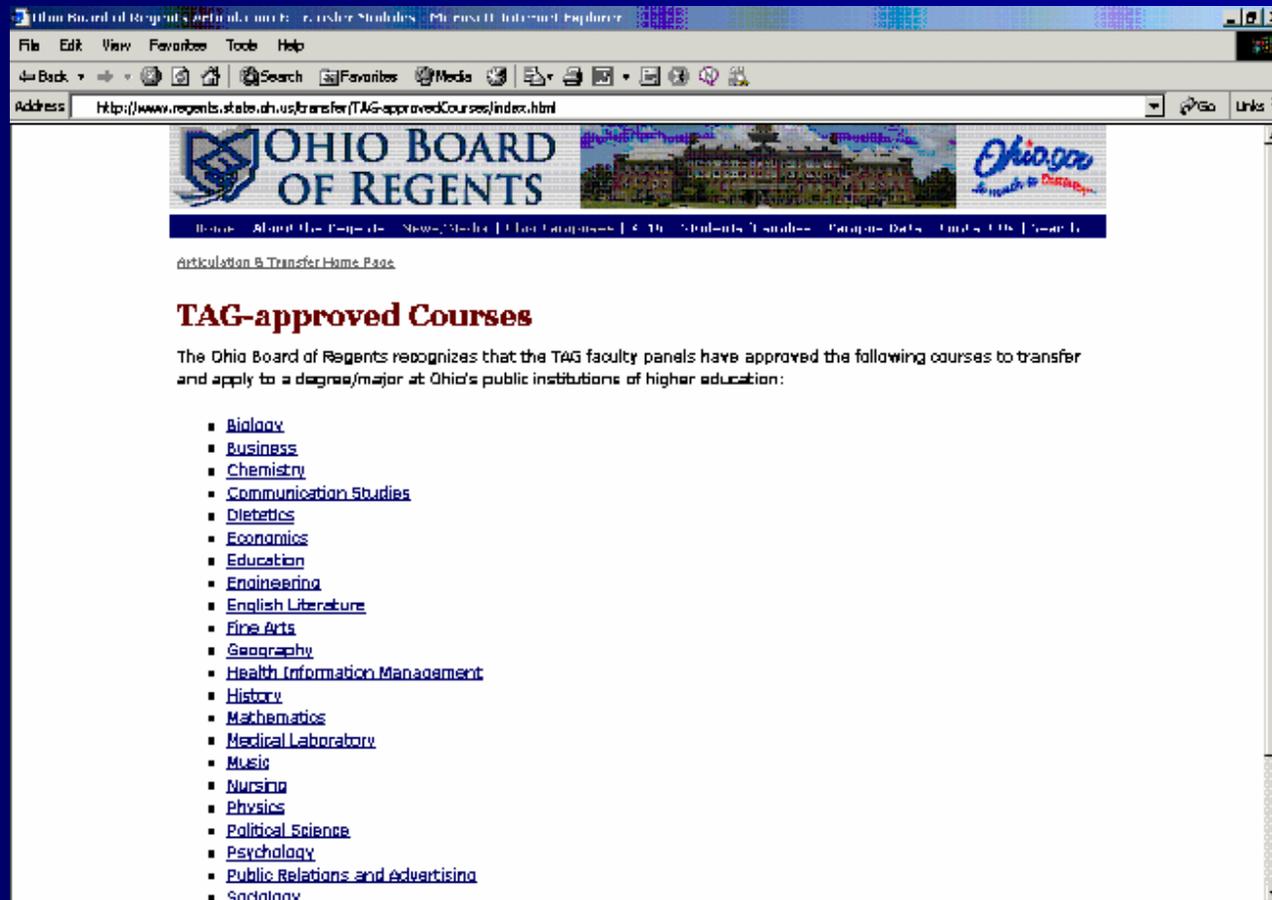
TAG Education and Marketing Plans

- TAG Education Plans – Assisted by Ohio Transfer Council
- Marketing Plans – Implementation to Happen After Courses Are Reviewed

Articulation and Transfer Website

- Plans to revise A&T website
- Approved Course Listing to become more than a Static Bulletin Board.
- For now:
<http://www.regents.state.oh.us/transfer/TAG-approvedCourses/index.html>

Approved Course List Web Site



The screenshot shows a web browser window displaying the Ohio Board of Regents website. The address bar shows the URL: <http://www.regents.state.oh.us/transfer/TAG-approvedCourses/index.html>. The page features the Ohio Board of Regents logo and a navigation menu. The main content area is titled "TAG-approved Courses" and includes a paragraph explaining that the board recognizes TAG faculty panels' approvals for course transfer. Below this is a list of 21 approved course categories, each with a blue square bullet point and a blue underlined link.

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TAG-approved Courses

The Ohio Board of Regents recognizes that the TAG faculty panels have approved the following courses to transfer and apply to a degree/major at Ohio's public institutions of higher education:

- [Biology](#)
- [Business](#)
- [Chemistry](#)
- [Communication Studies](#)
- [Dietetics](#)
- [Economics](#)
- [Education](#)
- [Engineering](#)
- [English Literature](#)
- [Fine Arts](#)
- [Geography](#)
- [Health Information Management](#)
- [History](#)
- [Mathematics](#)
- [Medical Laboratory](#)
- [Music](#)
- [Nursing](#)
- [Physics](#)
- [Political Science](#)
- [Psychology](#)
- [Public Relations and Advertising](#)
- [Sociology](#)

Approved Course List Example



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*The Ohio Board of Regents recognizes
the following TAG-approved courses for
Dietetics.*

*The following courses have been approved by the TAG faculty review panel to transfer
and apply to the degree/major at Ohio's public institutions of higher education.*

Institution	OAN Title	Course ID	Number of Course Matched	Date of Official Notice
AKRN	Food Science W/ Lab	7400250	Course 1 of 1	4/6/2006
BGSU	Basic Nutrition	F&N 207 F	Course 1 of 1	4/6/2006
BGSU	Basic Nutrition	F&N 207 H	Course 1 of 1	4/6/2006
BGSU	Basic Nutrition	F&N 207 M	Course 1 of 1	4/6/2006
BGSU	Basic Nutrition	F&N 207HM	Course 1 of 1	4/6/2006
BGSU	Food Science W/ Lab	F&N 210 M	Course 1 of 1	4/6/2006
BGSU	Food Science W/ Lab	F&N 210 O	Course 1 of 1	4/6/2006
BGSU	Food Service And Management	F&N 331 M	Course 1 of 2	4/6/2006
BGSU	Food Service And Management	F&N 422 M	Course 2 of 2	4/6/2006

Important Meetings

- November 16, 2006 – Key Policy Implementers
- November 17, 2006 – Transfer Module Faculty Subcommittee
- December 5, 2006 – Articulation and transfer Advisory Committee
- Workshops as Needed

How does this all fit together?

- Institution
 - Academic Policies
 - Schools/Departments
 - General Education Requirements
 - Programs/Majors
 - Course Catalogs
 - Class Schedules

 - Transcripts
- Board of Regents
 - Legislative Policies
 - Discipline Areas
 - Ohio Transfer Module
 - Transfer Articulation Guides
 - Learning Outcomes (OANs)
 - Term-by-Term Submissions of Approved Courses
 - Supplements

Articulation and Transfer Clearinghouse

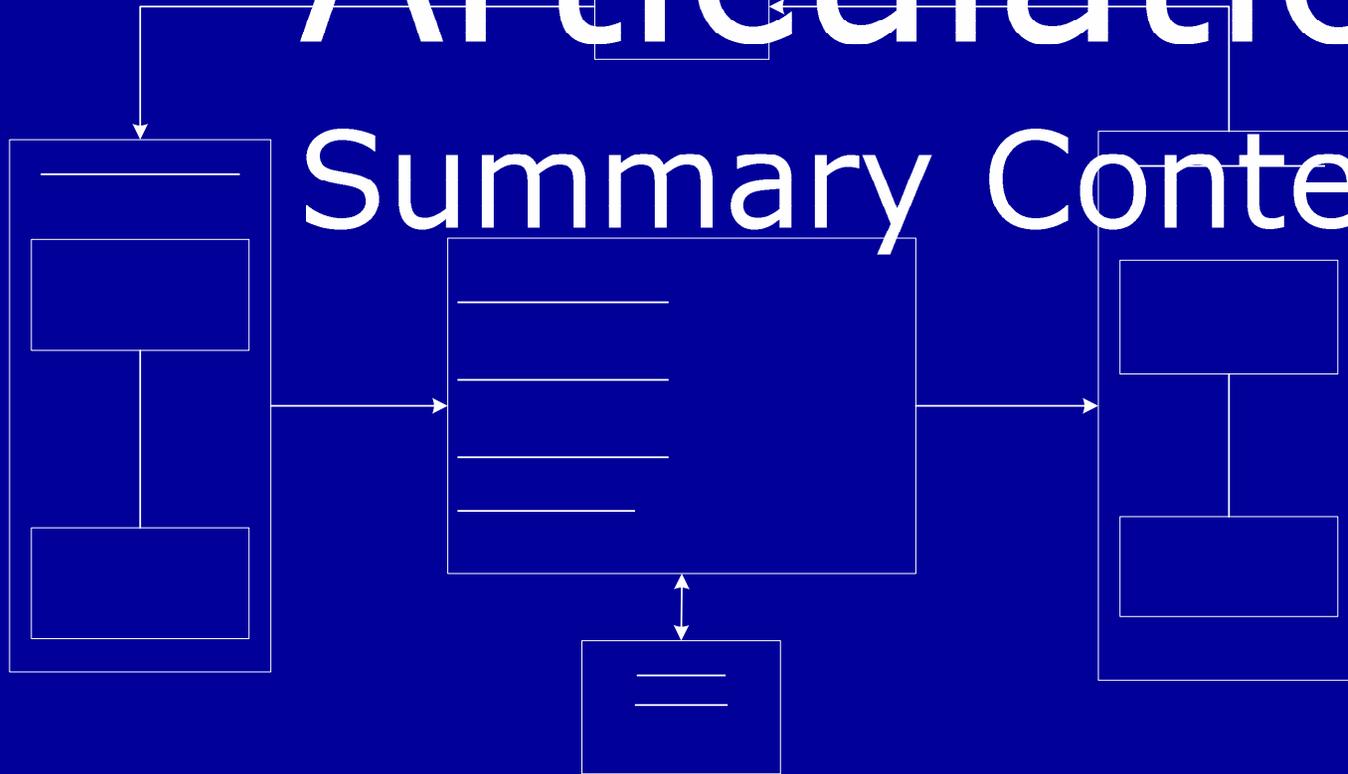
- The purpose of the Articulation and Transfer Clearinghouse is to
 - Facilitate the electronic exchange of transcripts among the Ohio state supported colleges and universities
 - Uniformly add supplementary course information regarding courses that are guaranteed to transfer and apply to majors
 - Allow institutional configuration and development of advising tools.

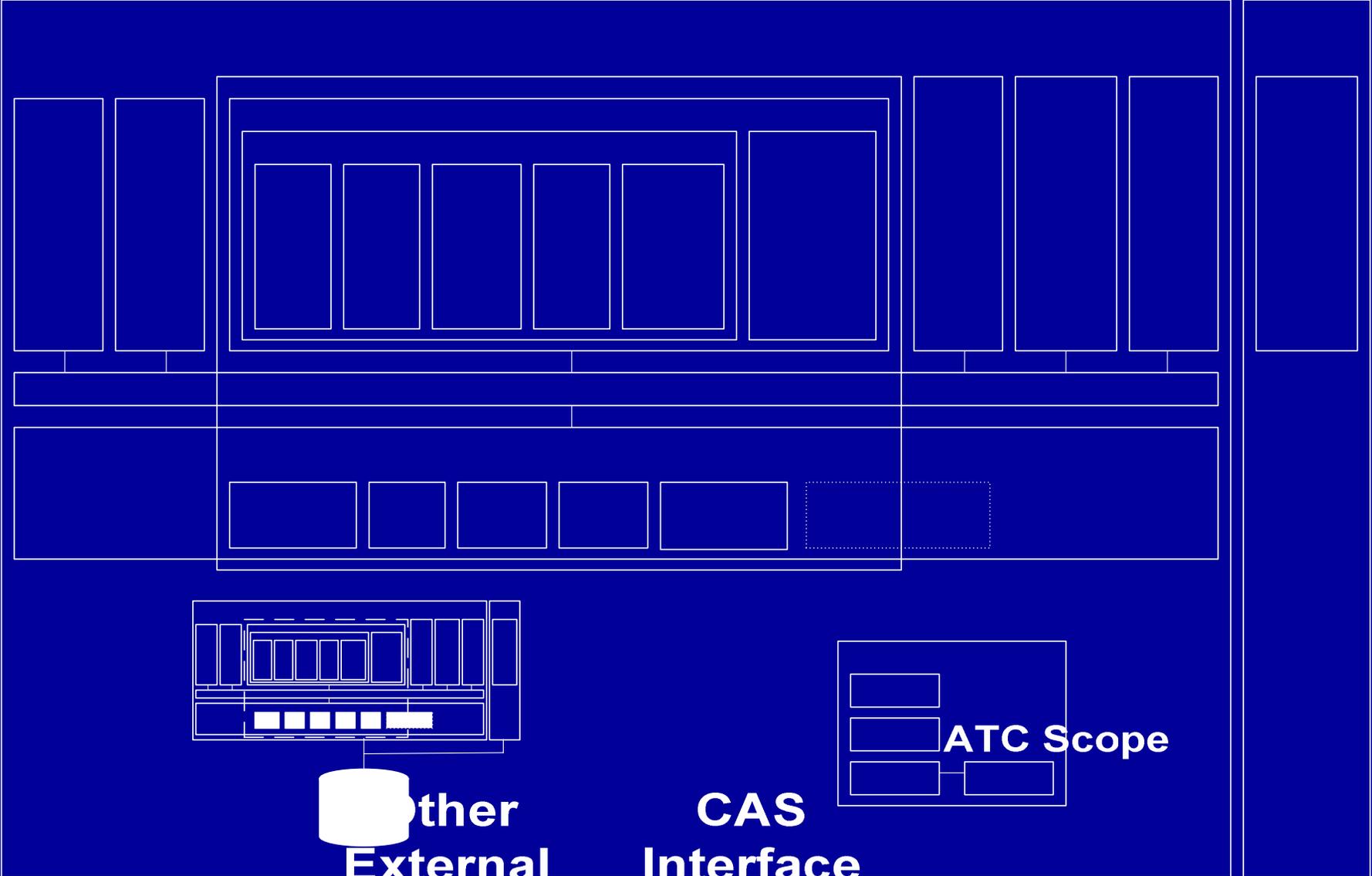
Articulation and Transfer Clearinghouse - Today

- Institutional Requirements Reviews Held
- Requirements being implemented using a web services architecture
- Have hardware and software in house and have built three development and test environments.
- Interface specification using PESC XML standard baselined.
- **Have simulated an electronic transcript exchange!**

Articulation T

Summary Context Di





**Other
External
Systems**

**CAS
Interface**

ATC Scope

How Will the ATC Deliver Transcripts?

- Electronically via a web services call in XML format (preferred)
- Via an ATC Central-based login screen
 - Display or download transcripts and supplements
 - XML or PDF format
- Transcript Supplement will contain information regarding matching courses
 - Some courses taken during the Leap of Faith era will require manual intervention and will be flagged as such in the XML and PDL versions of the supplement.
 - Special handling required so student is “held harmless” due to errors in matching or delays in course approvals.

Articulation Transfer Clearinghouse

Official Transcript

Document Details

DocumentID: 2006-10-20T09:25:00-50012341234213
 Date Created: 2006-10-20T09:25:00
 Document Type: Request
 Transmission Type: Original

Student

Name: John Doe JR

Source Organization

IPEDs: 203748
 Address: 3005 Abbe Road
 OH 44035 US

Destination Organization

IPEDs: 204796

Academic Record

Academic Session

Academic Session Detail

Section Designator	Section Designator Suffix	Section Name	Session Type	Session Begin Date	Session End Date	Notes
2005-08				2005-09-22	2005-12-18	

Course

Subject Abbreviation:	ENGL	Credit Basis:	Regular	Academic Grade Scale Code:	
Number:	167	Credit Units:	Semester	Narrative Explanation Grade:	
Section Number:		Credit Level:	Undergraduate	Level:	
Title:	WRITING POETRY	Begin Date:		Original Course ID:	
Credit Value:	3	End Date:		Override School Crse Number:	
Credit Earned:	3	Add Date:		Applicability:	
Quality Points Earned:		Drop Date:		Instruction Site:	
Academic Grade:	B	Repeat Code:		Instruction Site Name:	
CIP Code:	230501			Note:	

Course

Subject Abbreviation:	HSTR	Credit Basis:	Regular	Academic Grade Scale Code:	
Number:	151G	Credit Units:	Semester	Narrative Explanation Grade:	
Section Number:		Credit Level:	Undergraduate	Level:	
Title:	CIVILIZATION I	Begin Date:		Original Course ID:	
Credit Value:	3	End Date:		Override School Crse Number:	
Credit Earned:	3	Add Date:		Applicability:	
Quality Points Earned:		Drop Date:		Instruction Site:	
Academic Grade:	C	Repeat Code:		Instruction Site Name:	
CIP Code:	540101			Note:	

Course

Subject Abbreviation:	MUSC	Credit Basis:	Regular	Academic Grade Scale Code:	
Number:	155	Credit Units:	Semester	Narrative Explanation Grade:	
Section Number:		Credit Level:	Undergraduate	Level:	
Title:	ELEMENTARY CLASS PIANO I	Begin Date:		Original Course ID:	
Credit Value:	2	End Date:		Override School Crse Number:	
Credit Earned:	2	Add Date:		Applicability:	
Quality Points Earned:		Drop Date:		Instruction Site:	
Academic Grade:	W	Repeat Code:		Instruction Site Name:	
CIP Code:	500503			Note:	

Course

Subject Abbreviation:	PEFT	Credit Basis:	Regular	Academic Grade Scale Code:	
Number:	188	Credit Units:	Semester	Narrative Explanation Grade:	
Section Number:		Credit Level:	Undergraduate	Level:	
Title:	TAI CHI	Begin Date:		Original Course ID:	
Credit Value:	1	End Date:		Override School Crse Number:	
Credit Earned:	1	Add Date:		Applicability:	
Quality Points Earned:		Drop Date:		Instruction Site:	
Academic Grade:	W	Repeat Code:		Instruction Site Name:	
CIP Code:	310501			Note:	

Academic Session

Draft Transcript

Ohio XML Format

- Adopted PESC XML Standard
- Ohio Implementation Guide has been accepted by all state-assisted institutions through public comment period
- Have validated content and structure of XML transcripts from Lorain, Cincinnati, Sinclair, Ohio State
- Resources:
http://www.regents.state.oh.us/articulation_transfer/AT/ATC/XML/index.html

XML Web Site

Articulation and Transfer Clearinghouse XML Resources - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites Media Print Copy Paste

Address http://www.regents.state.oh.us/articulation_transfer/AT/ATC/XML/index.html



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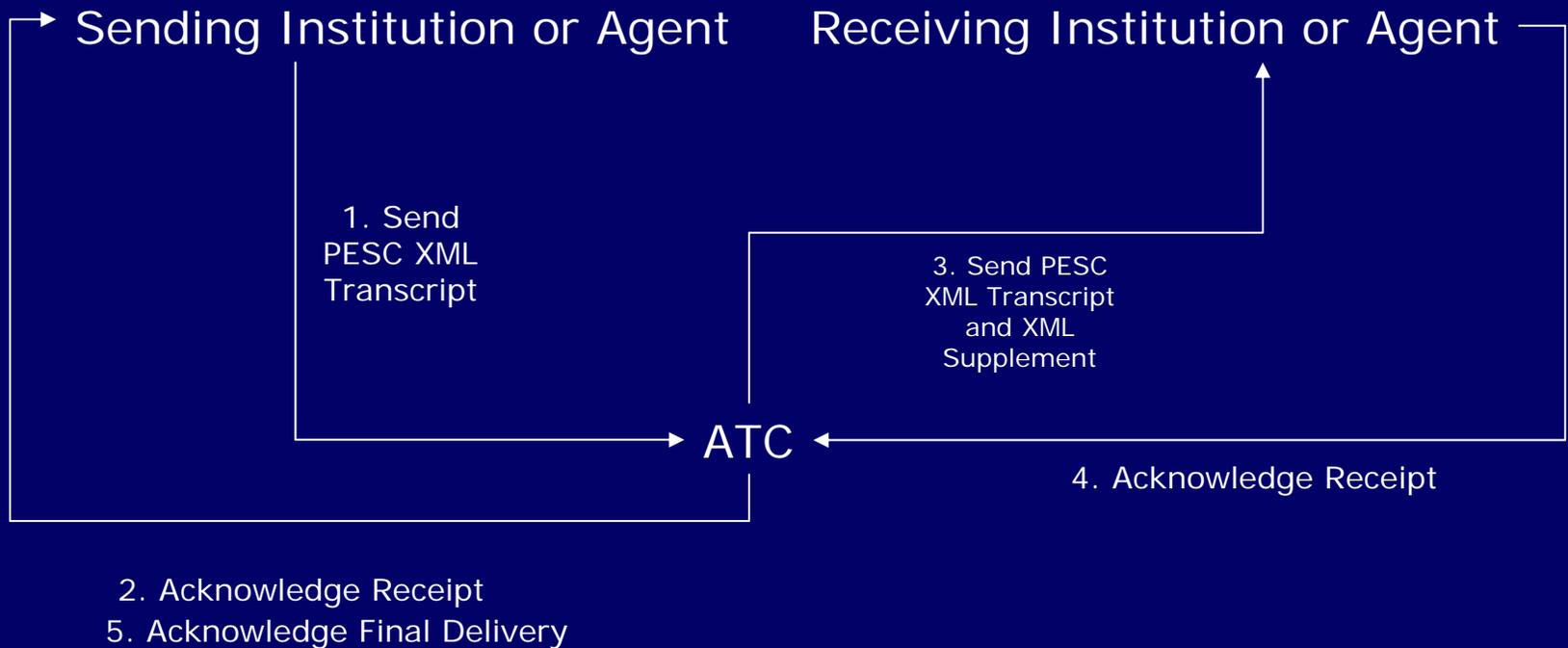
ATC XML Resources

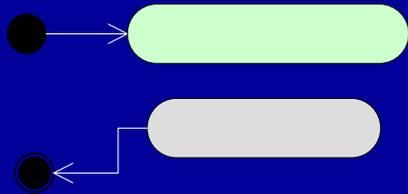
This site contains information related to the use of XML in the Articulation and Transfer Clearinghouse.

- XML Knowledgebase - A collection of links and documents which provide introductory information about XML.
- Transaction Sets Library - A repository for schemas and supporting documentation of XML used by the ATC.
- XML Pilot Group - Information for XML Pilot Group members.
- Services - Provides services for validating and viewing XML documents.

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Transcript Process Flow



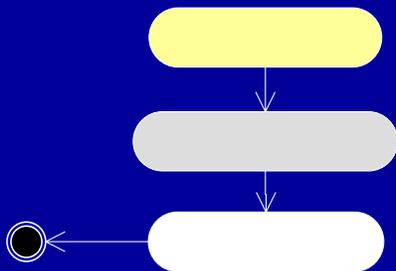


Articulation Activity Diagram (D

Name: ATC Transcript & Acknowledge

Source Institution

A1.1: Send PESC PostSecondary
Transcript to ATC



S1.1: Student
transcript request

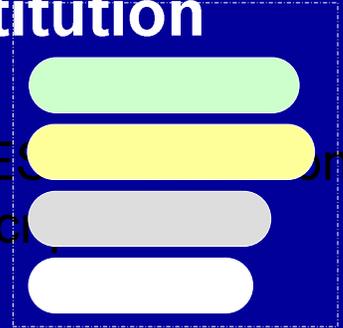
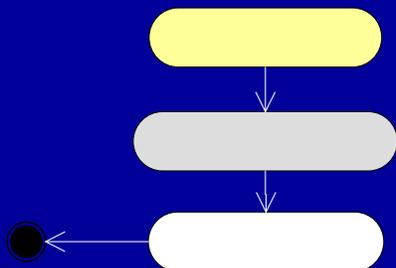
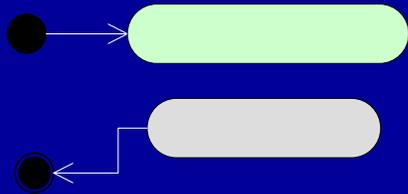
Articulation Activity Diagram (D

Name: ATC Transcript Acknowled

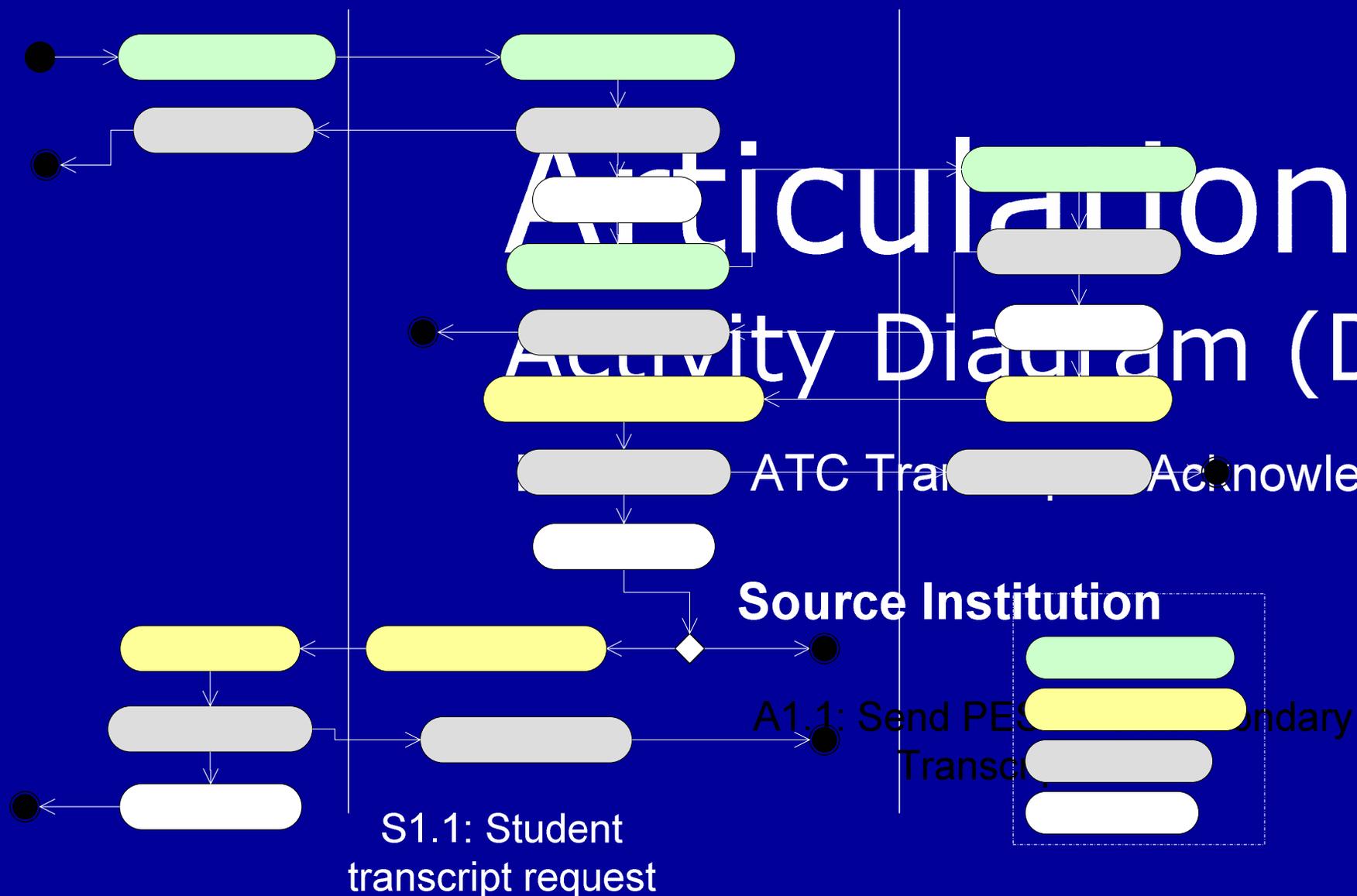
Source Institution

A1.1: Send PE
Transcr

S1.1: Student
transcript request



Articulation Activity Diagram (D



Security Considerations

- Full security policies will be publicized on finalization of ATC Security Model
- Firewalls built around and within the ATC Central
- Will use SSL for communications
- Transcript and Supplement will be digitally signed
- ATC Central will authenticate against receiving institution's policies
- ATC Central will hold transcripts and supplements at least as long as it takes for a successful delivery to occur
- Longer term holding of transcripts will be at control of institutions

Tools – SIS Interfaces

- ATC Central is treating institutions as black boxes
- Institutions should view ATC Central as a black box
- Therefore, meet the interfaces
- SIS Data Extraction and Insertion Teams formed for:
 - Banner
 - Datatel
 - Jenzabar
 - Homegrown – University of Cincinnati
 - Others will come later
 - Peoplesoft
 - Banner Powercampus
 - More Homegrown

Current State of Ohio SIS

11/2/2006 7:29	Current SIS	Future Plans?
Belmont Technical College	CAST	Jenzabar
Bowling Green		
Central Ohio Technical College	Jenzabar	Datatel - 2/2008
Central State University	Banner 6.2	7.3 Sept
Cincinnati State Technical and Community College	Datatel	
Clark State Community College	Datatel	
Cleveland State University	Peoplesoft	
Columbus State Community College	Datatel	
Cuyahoga Community College	Banner 7.1	7.3 Sept
Edison Community College	Datatel	
Hocking College	Homegrown	Datatel - 2/2007
James A. Rhodes State College	Banner 7.3	
Jefferson Community College	Banner	PowerCampus
Kent State University	Banner 7.3	

11/2/2006 7:31	Current SIS	Future Plans?
Lakeland Community College	Banner 6.1	7.2 Dec
Lorain County Community College	Jenzabar TE	??? - Fall 2008
Marion Technical College	Banner	PowerCampus
Miami University	Banner 7.2	7.3 Spring 07
NEOUCOM	Banner 7.3	
North Central State College	COCO?	RFP out
Northwest State Community College	Homegrown	Update 2008
Ohio University	Homegrown?	RFP out
Owens Community College	Banner 6.3	7.3 Oct
Rio Grande Community College	Jenzabar	
Shawnee State University	Jenzabar	
Sinclair Community College	Datatel	
Southern State Community College	Jenzabar	
Stark State Community College	COCO?	
Terra Community College		
The Ohio State University	Home Grown	Peoplesoft 2009
University of Akron	Peoplesoft	
University of Cincinnati	Home Grown	
University of Toledo	Banner 7.3	
Washington State Community College	Datatel	
Wright State University	Banner 7.1	7.3 Oct/Nov - 12/7
Youngstown State University	Banner 7.3	
Zane State Community College	Jenzabar CX	

Early Thoughts On Deployment Strategy

- Connect to ATC in “Bundles”
 - Identify Institutions Far Along on Learning Curve
 - Identify Institutions with Various SIS
 - Identify Institutions with Strong Communities of Interest - Geography
- For Example
 - Cincinnati, Cincinnati State, Sinclair, Wright State
 - Lorain, Cleveland State, Akron, Kent State, Toledo, Youngstown State

Deployment Considerations

■ Early Activities

- What will your business process be for a student requesting that a transcript be sent?
- What will your business process be for handling an ATC-delivered transcript
- How will you deal with the “special handling” courses?

Pre-Deployment Considerations

- Must validate interfaces for sending and receiving transcripts during User Acceptance Test
- Will require a “final” review of the course matches – what you’ll send to the other schools and what you’ll receive from the other schools
 - Includes OTM
- Administrative roles will need to be addressed
- Training

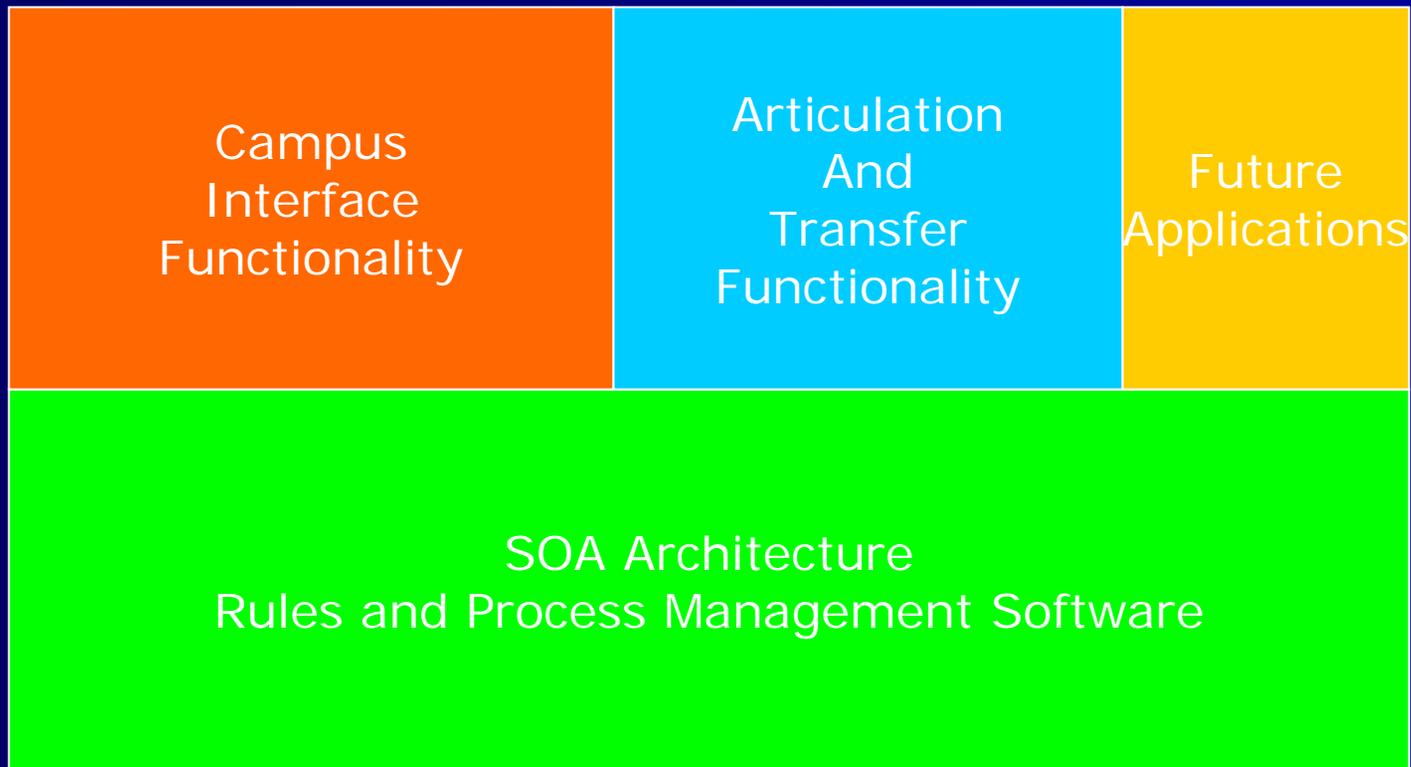
Ongoing Communications

- Bi-weekly SIS Lead Team Conference Calls
- Monthly Conference Calls with Interested Institutions
 - Next Call: November 14, 2006 at 1:00 PM

The Future – Tool Evolution

- What's in the ATC releases?
 - Electronic Transcript Exchange
 - TAG Course Articulation
 - Advising Tools
- What Might the ATC and the Web Services Platform Allow Us to Do in the Future?
 - Choose one of multiple course matches
 - Pass along course catalog information

The Direction



Questions?

- Presentation will be posted on Regents web site in Articulation and Transfer Campus News
- Dr. Paula Compton
 - pcompton@regents.state.oh.us
 - (614) 466-9994
- Jim Ginzer
 - jginzer@regents.state.oh.us
 - (614) 752-9486
- Thank-you!

Backup Slides

Revised Code 3333.162 (H.B. 66)

- Five faculty panels have been formed to write Learning Outcomes
- Structure is in place so far – more to come

Course Material Submission Form - 2

Credit Hours		<input type="checkbox"/> Quarter Hours	<input type="checkbox"/> Semester Hours
Lecture Hours			
Laboratory Hours (if applicable)			
Pre-Requisites(s) Course work (if applicable)			

Catalog/Course Description (Includes Course Title and Course #)

--

Texts/Outside Readings/Ancillary Materials

--

Course Objectives and/or Plan of Work

(Provide a clear indication of how the course objectives align with the OAN's learning outcomes. This will facilitate the faculty panel course review process.)

--

Description of Assessment and/or Evaluation of Student Learning

--

Master Syllabi and Working Syllabi (if both are used)

--

Additional Documentation

--

How do I name my course material files?

- Suppose you submitting data for Rhodes Community College, and you were matching your MATH110 course for OMT005 proposed to be effective in the 2007-2008 academic year, the name of the file would be LMTC-2007-OMT005-MATH110.
- If two (or more) courses (e.g. MATH110 **and** MATH111) are required to fulfill that same OAN, you would submit, LMTC-2005-OMT005-MATH110 as one file and LMTC-2005-OMT005-MATH111 as the other.
- When two courses are required to satisfy the OAN learning outcomes, one Course Submission Form should indicate "Course 1 of a 2 Course OAN Matching" and the second Course Submission Form should indicate "Course 2 of a 2 Course OAN Matching" on page 1 of the form.
- For multiple courses, **each** of which can satisfy a single set of OAN learning outcomes, the Course Submission Forms should indicate "Course 1 of a 1 Course OAN Mapping" for **each** course.
- When you are done with your submissions, please send them electronically to the Ohio Board of Regents at atpanels@regents.state.oh.us so faculty panels can review to them.

Sample Course Review Timeframes

- If a new course has been matched to the learning outcomes, the new course will have to be approved according to the timeframes below:
- Quarter Institution

	Summer	Autumn	Winter	Spring
Course Material Submitted for Review	By 6/1	By 8/15	By 1/1	By 3/1
Faculty Panel Reviews Completed	By 8/1	By 12/31	By 2/28	By 5/31

Sample Course Review Timeframes

- If a new course has been matched to the learning outcomes, the new course will have to be approved according to the timeframes below:
- Semester Institution

	Summer	Autumn	Spring
Course Material Submitted for Review	By 6/1	By 8/15	By 1/1
Faculty Panel Reviews Completed	By 8/1	By 12/31	By 5/31