

# **Ohio Articulation and Transfer Tools Update**

February 22, 2007

# Data Driven Tools

- Approved Course Bulletin Board – already shown
- Surveys for TAG improvement
- TAG Course Management System
- Articulation and Transfer Clearinghouse

# Survey Tools

- Use of short surveys for TAG Panel support
- Data collection for Articulation and Transfer Clearinghouse
- Other needs that may arise
- [www.surveymonkey.com](http://www.surveymonkey.com)

# Business TAG OAN Survey

- Purpose: to determine which 4-year institutions do and do not require course work corresponding to Business TAG OANs
- Asked about courses required, offered, not offered
- Results available at:  
<http://www.surveymonkey.com/Report.asp?U=320463223800>

# Business TAG Survey Results

(as of 2/21/07)

SurveyMonkey.com - The easiest way to create online surveys. - Microsoft Internet Explorer

Address: C:\Documents and Settings\jginzer\Local Settings\Temp\Summary.html

1. For which institution are you responding?

	Response Percent	Response Total
<b>Bowling Green State University</b>	9.1%	1
<b>Central State University</b>	9.1%	1
Cleveland State University	0%	0
Kent State University	0%	0
<b>Miami University</b>	9.1%	1
<b>The Ohio State University</b>	9.1%	1
<b>Ohio University</b>	9.1%	1
<b>Shawnee State University</b>	9.1%	1
<b>University of Akron</b>	9.1%	1
<b>University of Cincinnati</b>	9.1%	1
<b>University of Toledo</b>	9.1%	1
<b>Wright State University</b>	9.1%	1
<b>Youngstown State University</b>	9.1%	1
<b>Total Respondents</b>		<b>11</b>
(skipped this question)		0

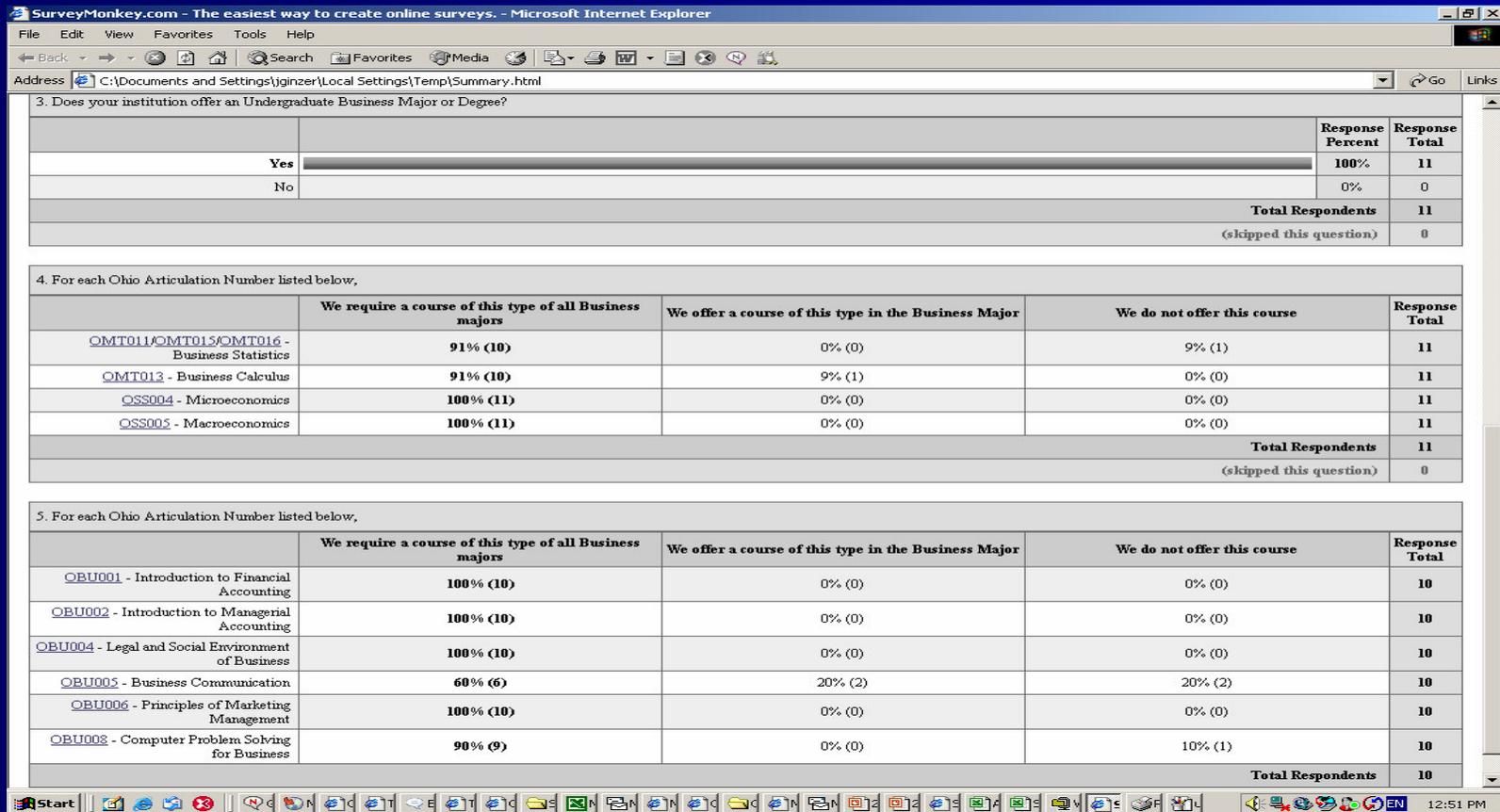
2. Please enter information about the person responding to this survey

	Response Percent	Response Total
<b>Name</b>	100%	11
<b>Email</b>	100%	11
<b>Phone Number</b>	100%	11
<b>Total Respondents</b>		<b>11</b>
(skipped this question)		0

3. Does your institution offer an Undergraduate Business Major or Degree?

	Response Percent	Response Total

# Business TAG Survey Results - 2



# TAG Course Management System

- Management of TAG and OAN information
- On-line submission of course materials, matching information, and withdrawals
- On-line support of materials reviews
- Integrated support of review rubrics
- Extendable to other initiatives – e.g. CT2, Stackables, and AP Credits

# TAG and OAN Information

- TAG description
  - Transfer Module recommendations
  - Major requirements
- OAN description
  - Credits
  - Prerequisites
  - Learning Outcomes

# On-line submission of institutional information

- Course materials – create a TAG course catalog or inventory
- Match – use the inventory to create matches and submit for review
  - Closely align submission data with learning outcomes and review rubric
- Withdrawal – submission of withdrawal notifications
- All forms are web-based under password – protection
  - Only your institution's work

# On-line support of materials reviews

- Web-based course material reviews
- Rubrics integrated into the process
- Electronic workflow
  - Notification of new submissions
  - Reminders
- Dispositions submitted electronically
- Secure
  - Only your panel's work
  - Dispositions under control of point person
- Flows into Clearinghouse, Bulletin Board, etc.

# Reporting

- Browse and retrieve course materials
- Status reporting
  - Statistics
  - Indexes
- By panel/TAG
- By institution

# How will we get there?

- Create two advisory groups
  - Submitters
  - Panel members
- Quick exploratory study
- Iterative development methodology

# Articulation and Transfer Clearinghouse

- Why is Ohio Doing an Articulation and Transfer Clearinghouse?
- What is the Articulation and Transfer Clearinghouse?
- How will it work?
- How will we implement it?

# What is the Articulation and Transfer Clearinghouse (ATC)?

- The ATC establishes a statewide transfer support mechanism to
  - Securely move electronic transcripts between the state-supported institutions using nationally accepted standards
  - Consistently apply the state-wide Articulation and Transfer course equivalencies established through TAGs, OANs, and review processes
  - Flexibly respond to changes in policies, curriculum, and technology

# Why do I need the ATC?

- Facilitate routing of electronic transcripts in nationally accepted, standard format
  - PESC XML with Ohio implementation details
- Off-load institutional complexity in application of course equivalency rules
- Consistently and comprehensively apply the rules based on latest faculty panel decisions

# Course Mapping Example

- Suppose OSU has indicated that MATH123 matches the learning outcomes of OTM001
- Suppose CSCC has indicated that MTH 166 matches the learning outcomes of OTM001
- Suppose WSUN has indicated that MTHM101 and MTHM102 together match the learning outcomes of OTM001
- WSUN also has indicated that MTHM200 matches the learning outcomes of OTM 001
  
- Suppose the Math Panel approves all these matches starting WI06
  
- Suppose I take MTH166 at CSCC in AU2005 – no match!
  
- Suppose I take MTH166 at CSCC in WI2006 and apply to transfer to WSU and OSU after SP2006
- ATC supplements my transcript destined for OSU with OTM001 and MATH123 information
- ATC supplements my transcript destined for WSUN with OTM001 and MTHM101 and MTHM102 information as well as MTHM200

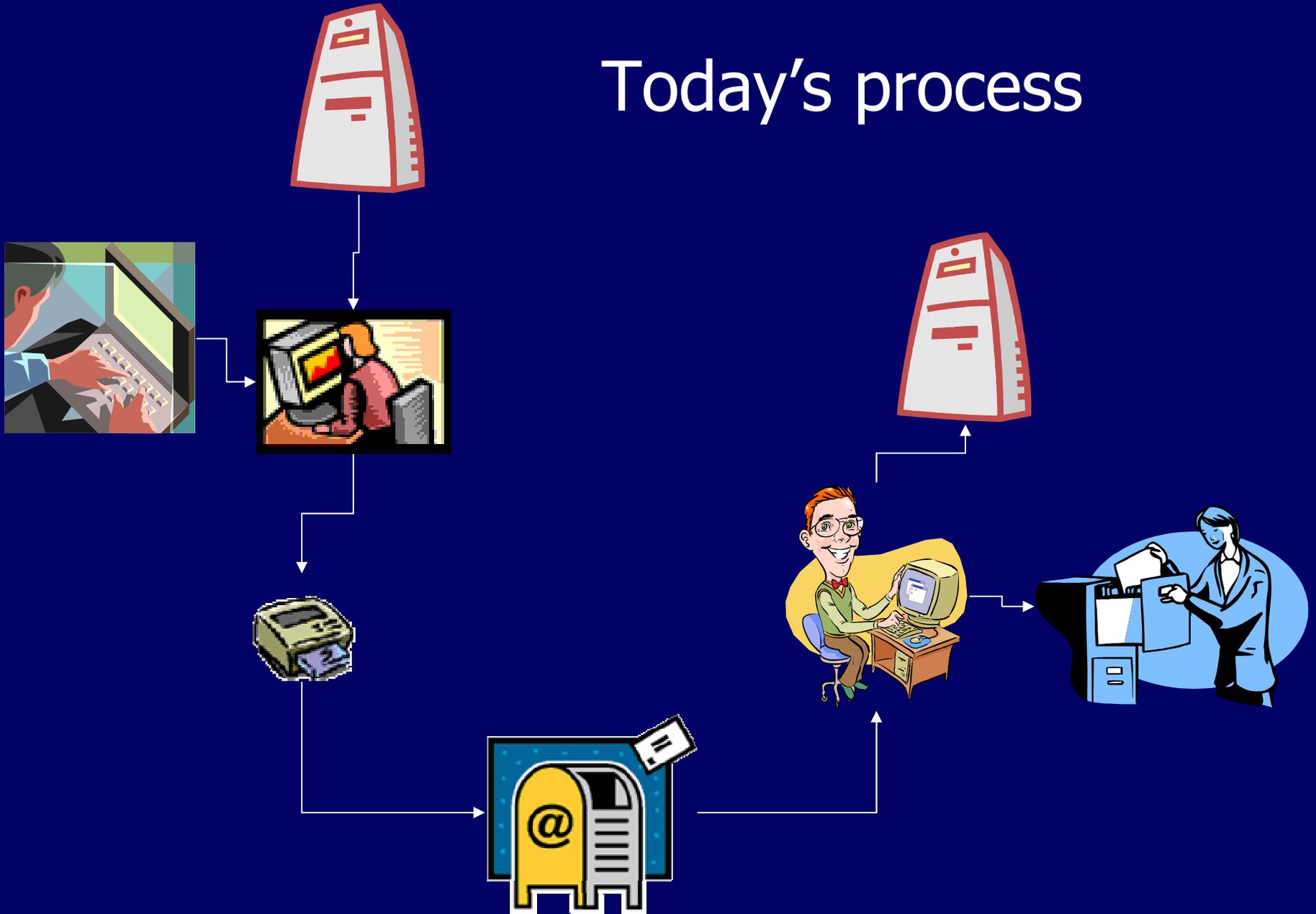
# Doesn't CAS already do this?

- CAS provides similar information for planning purposes
- ATC provides support for official transcript exchange when a student moves between campuses
- We will continue to address the overall Ohio Transfer and Articulation Architecture with CAS

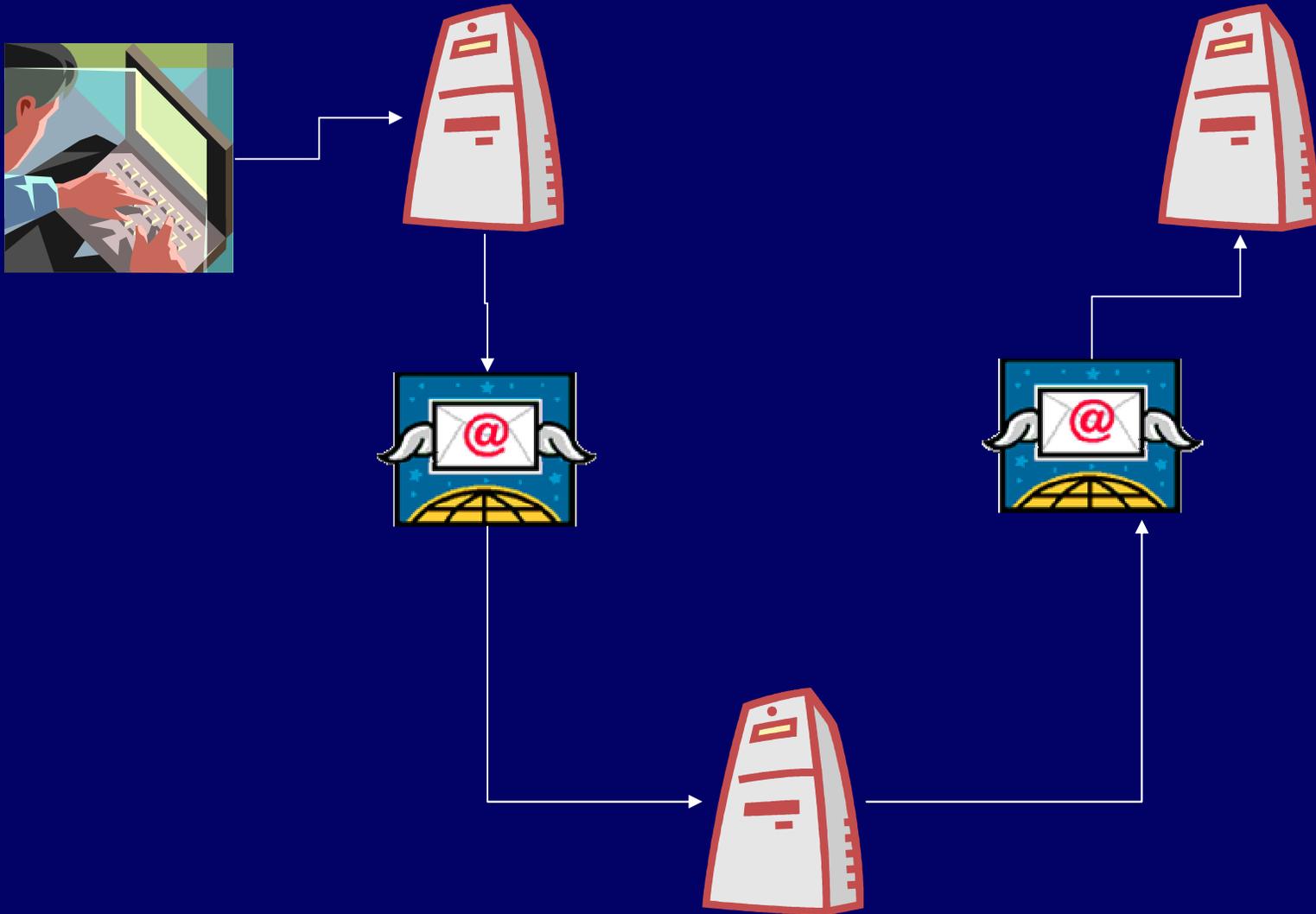
# Delivery of functionality

- Production – *Pilot appx. 3/1/07, production appx. 4/1/07*
  - Web page to send transcript
  - Web service to send transcript
  - Web page to receive transcript
  - User interface
  - Security model
  - Electronic communication – email
  
- June Update
  - Acknowledgement to source institution that transcript was received and processed by destination
  - Full Security Model
  - Institutional Configuration User Interface
  
- Course equivalency in supplement – *Pilot appx. 7/1/07, production appx. 8/1/07*
  
- TBD - Ohio Transfer Module in supplement
  
- Further enhancements...

# Today's process



# Long term new process



# Demonstration Scenario

- Gabriella Settle (not a real student) has requested her transcript be sent from Lorain County Community College to the University of Cincinnati via Lorain's web site
- Request has been received in Lorain's Records Office.

# Business Processes

## ■ At Lorain

### – Records office will

- clear student's accounts
- initiate an electronic process to extract student data from Lorain's Jenzabar TE Student Information System, format the transcript in the agreed upon standard, and deliver it to the Central Clearinghouse via a web service call

## ■ At Cincinnati

- ### – Registrar's Office will periodically log onto the Central Clearinghouse to see if any transcripts are available to view or download via a web page interface.

# Sending institution – records office transcript request

Electronic Transcript Center - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Refresh Home Search Favorites

Address <http://localhost/webtools/transcripts/send.aspx>

 **Electronic Transcript Center**

Type in the Student Number that a transcript needs to be sent for.

Select the college the student wants the transcript sent to

Lorain County Community College | 1005 N Abbe Rd -- Elyria, OH 44035 | 1-800-995-LCCC | Webmaster | Contact Us  
©2006 LCCC

# Sending institution – ATC central response

The screenshot shows a Microsoft Internet Explorer browser window with the title "Electronic Transcript Center - Microsoft Internet Explorer". The address bar displays "http://localhost/webtools/transcripts/send.aspx". The page content includes the Lorain County Community College logo and the title "Electronic Transcript Center". Below the title, the tracking ID is "151" and the document ID is "2006-11-29T13:05:40-50012341234213". There are two links: "go here" for sending another transcript and "go here" for the Admin Control Panel. The footer contains contact information for Lorain County Community College, including the address "1005 N Abbe Rd -- Elyria, OH 44035", phone number "1-800-995-LCCC", and copyright notice "©2006 LCCC".

Electronic Transcript Center - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Search Favorites

Address <http://localhost/webtools/transcripts/send.aspx>

 **Electronic Transcript Center**

TrackingID: 151  
DocumentID:2006-11-29T13:05:40-50012341234213

To Send another transcript, [go here](#)

To go to the Admin Control Panel, [go here](#).

Lorain County Community College | 1005 N Abbe Rd -- Elyria, OH 44035 | 1-800-995-LCCC | Webmaster | Contact Us  
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# ATC Central – Login Page



OHIO BOARD OF REGENTS

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- Rnet
- Career Opportunities
- Staff Directory
- Contact Us
- Regents Home
- Related Links

Hide Portal

Information For:

- Students & Families
- Pre-K - 16
- Policymakers
- Colleges & Universities
- Media Representatives
- Business Stakeholders
- Board of Regents

- Academic Programs
- Board Meetings
- Budget & Financial
- Capital Planning
- Credit Transfer
- HEI System
- Legislative Services
- Performance Reporting
- News & Publications
- State Grants & Scholarships



## Articulation & Transfer Clearinghouse

User Name

Password

# Welcome Screen



OHIO BOARD OF REGENTS

[Home](#)

[Transcript](#)

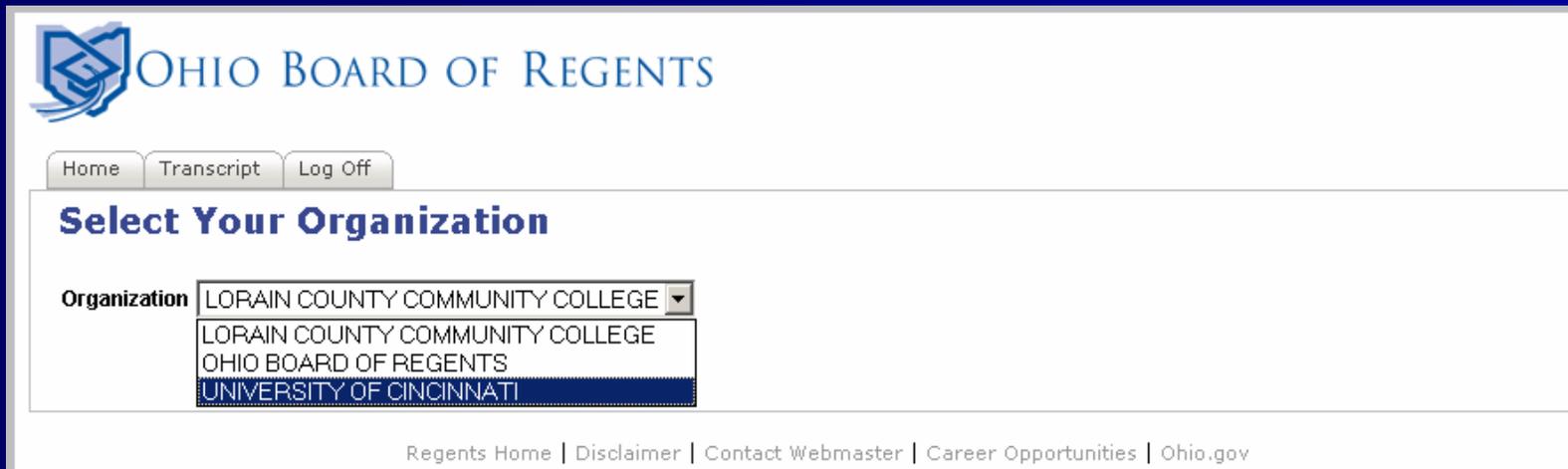
[Log Off](#)

## Welcome to the Articulation Transfer Clearinghouse

Enter text here to describe the ATC or present notifications to end-users.

[Regents Home](#) | [Disclaimer](#) | [Contact Webmaster](#) | [Career Opportunities](#) | [Ohio.gov](#)

# Select Institution



The screenshot displays the Ohio Board of Regents website interface. At the top left is the logo, which consists of a stylized blue 'O' with a book icon inside. To the right of the logo is the text 'OHIO BOARD OF REGENTS' in a blue, serif font. Below the logo and text are three navigation buttons: 'Home', 'Transcript', and 'Log Off'. The main content area is titled 'Select Your Organization' in a bold, dark blue font. Underneath this title is a dropdown menu labeled 'Organization'. The dropdown is currently open, showing four options: 'LORAIN COUNTY COMMUNITY COLLEGE' (selected), 'LORAIN COUNTY COMMUNITY COLLEGE', 'OHIO BOARD OF REGENTS', and 'UNIVERSITY OF CINCINNATI'. At the bottom of the page, there is a footer with the text 'Regents Home | Disclaimer | Contact Webmaster | Career Opportunities | Ohio.gov'.

 OHIO BOARD OF REGENTS

[Home](#) [Transcript](#) [Log Off](#)

## Select Your Organization

Organization

- LORAIN COUNTY COMMUNITY COLLEGE
- LORAIN COUNTY COMMUNITY COLLEGE
- OHIO BOARD OF REGENTS
- UNIVERSITY OF CINCINNATI

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# Search for Available Transcripts

Ohio Board of Regents - Articulation and Transfer Clearinghouse - IT - v0.3.0 - Microsoft Internet Explorer

Address: https://mcbain/ATC/transcript/transcriptSearch?sourceOrganization=3&destinationOrganization=NULL&trackingId=&status=NULL&firstName=&lastName=&ssn=&schoolAssigner=

**OHIO BOARD OF REGENTS**

Home Transcript Log Off

[Search](#)  
[Validate](#)  
[Upload](#)  
[Download](#)

**Search Transcript**

Source Org: UNIVERSITY OF CINCINNATI Destination Org:

Tracking ID:  Status:

Firstname:  Last Name:

SSN:  School ID:

Start Date:  End Date:

Search Reset

**Search Results**

Tracking Id	Source Org	Destination Org	Created Date
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4662	01/26/2007 10:21:54 AM	Transcript Validated	12345678900000000001
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4662	01/26/2007 10:22:01 AM	Transcript Saved	12345678900000000001
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4663	01/26/2007 10:22:51 AM	Transcript Validated	12345678900000000001

# View Transcript Details

Ohio Board of Regents - Articulation and Transfer Clearinghouse - IT - v0.3.0 - Microsoft Internet Explorer

Address: <https://mcbain/ATC/transcript/transcriptDetail?transcriptId=4665>

**OHIO BOARD OF REGENTS**

Home Transcript Log Off

Search  
Validate  
Upload  
Download

## Transcript Details

**Tracking ID** 4665  
**Source** LORAIN COUNTY COMMUNITY COLLEGE **Destination** UNIVERSITY OF CINCINNATI  
**Status** Transcript Viewed  
**Transcript** [XML](#) / [PDF](#)  
**Supplement** [XML](#) / [PDF](#)

After using the links on the left to download the transcript and supplement, click [here](#) to confirm that your downloads were successful and to remove the transcript from the Transcript Download Page.

Events			
Name	Date	User	Description
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Transcript Validated	01/26/2007 10:34:11:161 AM	ATC SYSTEM	Transcript validated successfully.
Transcript Saved	01/26/2007 10:34:11:582 AM	ATC SYSTEM	Transcript saved to database.
Pending Download	01/26/2007 10:34:11:588 AM	ATC SYSTEM	Transcript ready for download by UNIVERSITY OF CINCINNATI.
Transcript Viewed	01/26/2007 10:35:50:600 AM	BOECKMAN, JEREMY	Transcript viewed by UNIVERSITY OF CINCINNATI.
Transcript Viewed	01/26/2007 10:35:52:492 AM	BOECKMAN, JEREMY	Transcript viewed by UNIVERSITY OF CINCINNATI.
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Transcript Viewed	01/26/2007 10:39:00:484 AM	BOECKMAN, JEREMY	Transcript viewed by UNIVERSITY OF CINCINNATI.

Start | GroupWise Mess... | Novell GroupWise... | TNCHEMS - 20070... | Ohio Board of R... | untitled - Paint | Local intranet | 9:34 AM

# XML Transcript

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file://C:\Documents%20and%20Settings\jginzer\Desktop\ac\_Trans\_4588.xml

11/27/2006

# Screenshot of Draft Formatted Transcript

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Document Type:	Request						
Transmission Type:	Original						
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Address:	1005 Abbe Rd OH 44052 US			Birth Date:	1946-10-2		
Email:	webmaster@orainccc.edu			Gender Code:	Male		
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IPEDS:	203748			Destination Organization:	3340		
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<b>Academic Session</b>							
<b>Academic Session Detail</b>							
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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			Notes:			
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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:			
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Quality Points Earned:		Drop Date:		Instruction Site:			
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Section Number:		Credit Level:	Undergraduate	Level:			
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Credit Earned:	2	Add Date:		Applicability:			
Quality Points Earned:		Drop Date:		Instruction Site:			
Academic Grade:	W	Repeat Code:		Instruction Site Name:			
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# XML Supplement

Page 1 of 3

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file:///C:/Documents%20and%20Settings/jginzer/Desktop/plac\_Trans\_Suppl\_4588.xml 11/27/2006

# Screen Shot of Draft Formatted Supplement

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ISHIT	132		
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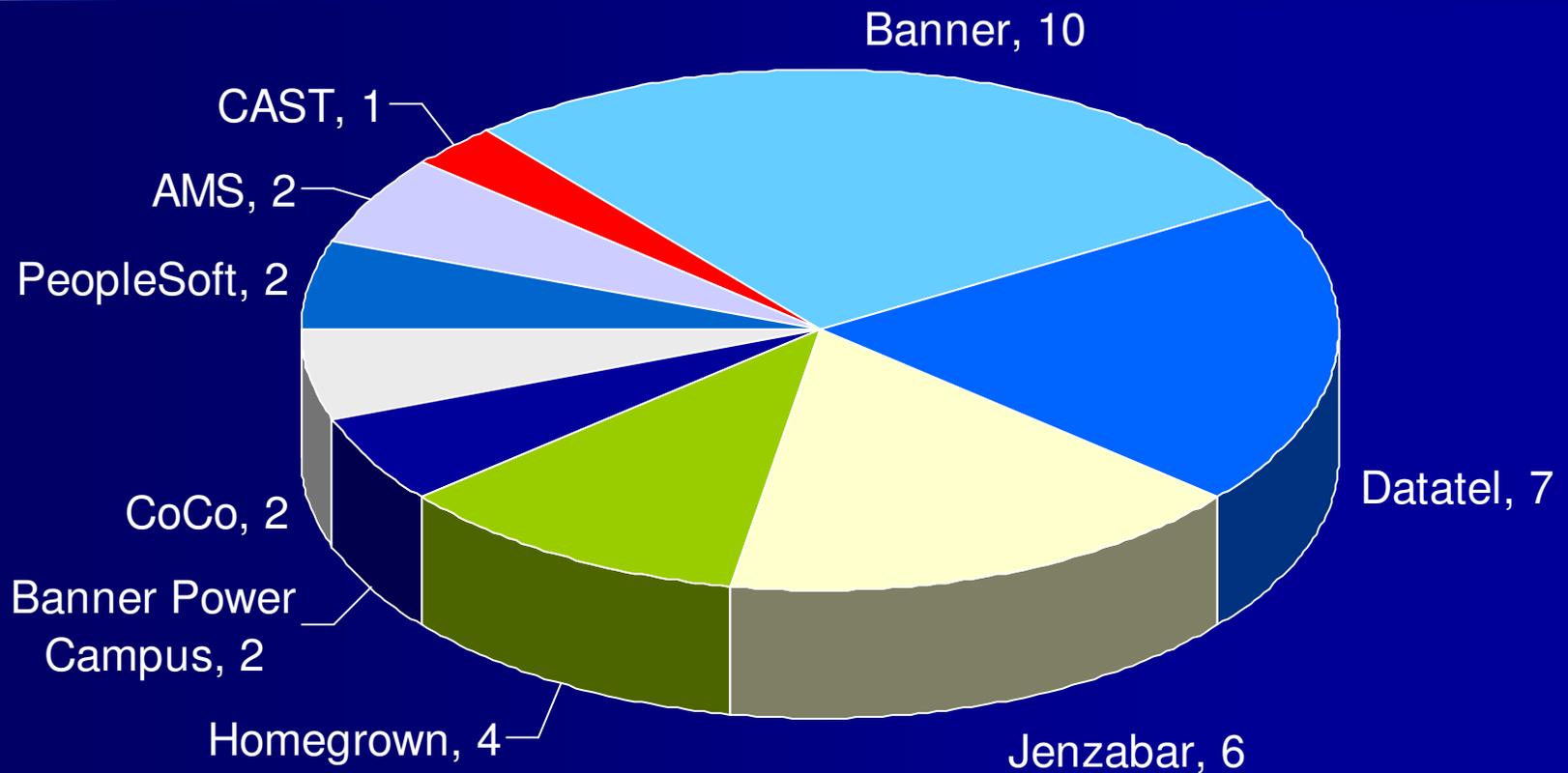
# Where are we now – Central Clearinghouse?

- Completed hardware and software procurement
- Have implemented 3 development and test environments at Regents
- Have started planning for hosting production environment
- Established development and testing infrastructure

# Deployment strategy considerations

- Which institutions will go into production use first?
  - What is the level of readiness?
    - Technology
    - Business Processes
  - What is the level of interest?
  - What software platform is being used?
  - How is transfer evaluation done today?
  - What third party products are in use?
  - What SIS are in use?
  - Are there any SIS changes or upgrades planned?
- Which institutions will be part of the pilots?

# Student information systems



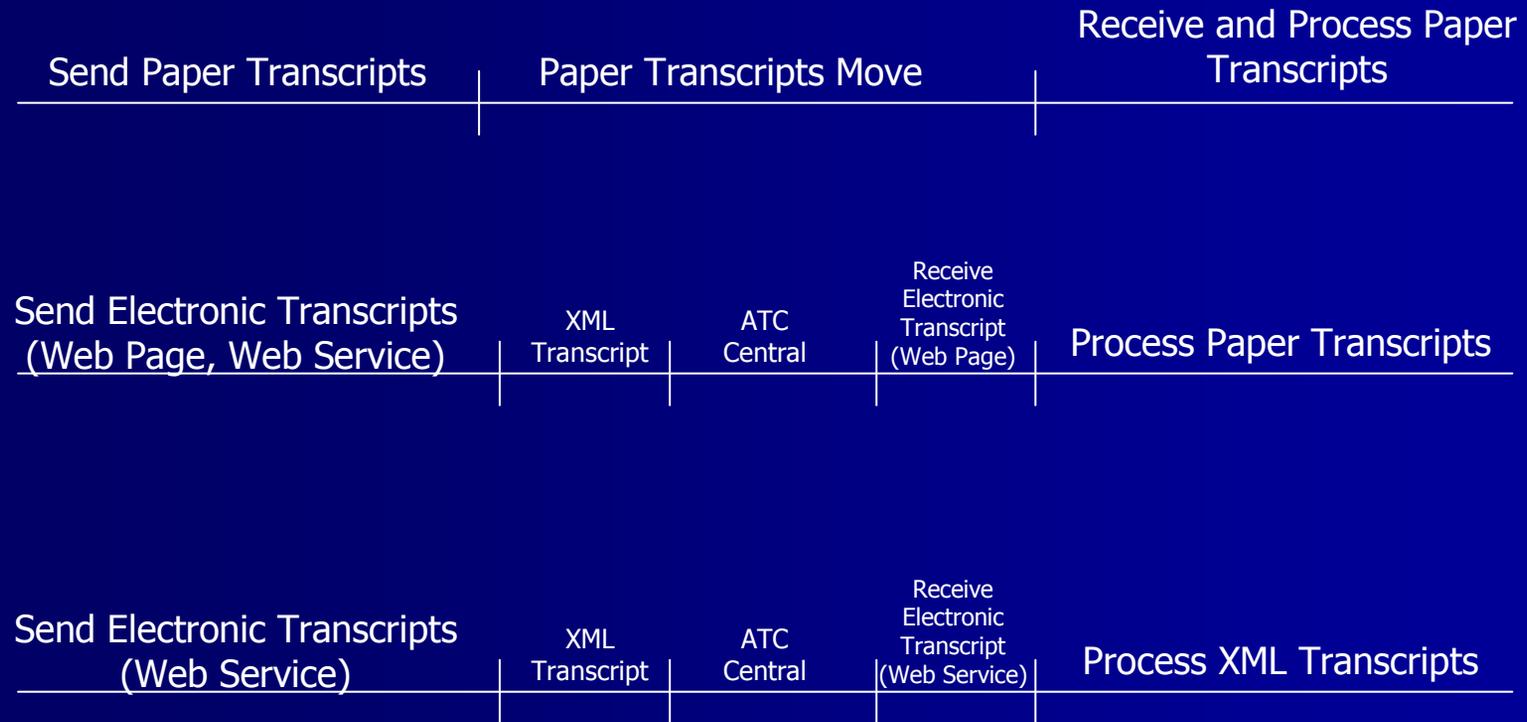
# SIS Considerations

- Known Changes
  - 1 CAST to Jenzabar
  - 1 AMS to PeopleSoft – 1/09
  - 1 AMS to TBD (RFP)
  - 1 Homegrown to Datatel – 2/07
  - 1 Homegrown to PeopleSoft - 2009
  - 1 Jenzabar TE to TBD – Fall 2008
  - 1 COCO to Banner – 1/2008
  - 1 COCO to Datatel - TBD
- Native PESC XML Support
  - Banner 7.3

# Institutional support so far

- Established 3 centers focused on institutional software development needs
- Worked with 2 other institutions to validate transcripts
- Initiated bi-weekly communications with SIS center leads
- Initiated monthly communications with all institutions to facilitate the technical implementation as well business process redevelopment
  - Will go to bi-weekly
- Added Regents staff to assist institutions with testing and support.

# Institutional Process Evolution



# Institutional implementation needs

- Identify single point of contact for all ATC implementation matters
- Document existing business processes
  - Send transcript
  - Receive transcript
  - Received-transcript processing
- Identify needed changes to sending and receiving processes
- Document institutional project implementation plan and merge with ATC Central implementation plan

# Future Opportunities and Expansions?

- Other Articulation and Transfer Tools Will Reside on the New Architecture
  - Course Materials Submission
  - Course Material Reviews
  - Student and Advisor Support Tools
  - Campus Self-Configuration
- Migrate BOR Data Collection and Queries to New Architecture
- Implement Other OSC Initiatives on New Architecture
- Career/Technical Schools
- Certificate Programs
- Private Institutions
- High Schools
- Out of State Neighboring Institutions

# Thank-you!