UNIVERSITY OF OREGON

USING TECHNOLOGY TOOLS TO MEET OUTRAGEOUS TRANSFER ARTICULATION SERVICE AGREEMENTS

AACRAO TECH 2015 – AUSTIN, TX

SUE EVELAND, UNIVERSITY REGISTRAR
UNIVERSITY OF OREGON

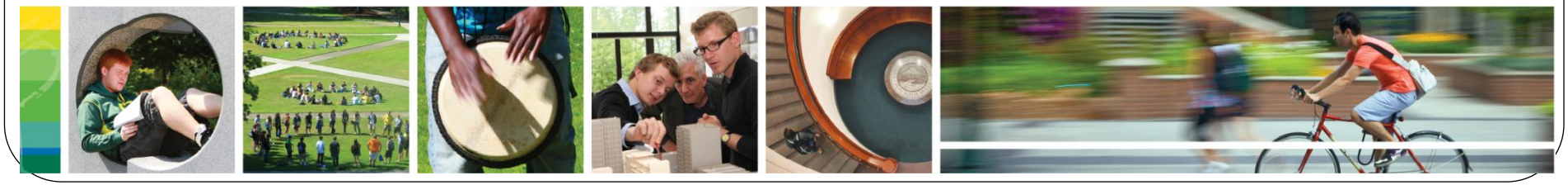
SESSION ID 4085

Overview: 18,000 in 3-5 Days

- Techniques for tracking work
- Tips for making/storing equivalencies
- Tips for serving equivalencies
- Hands-Free EDI Processing
- Hands-free Reverse Transfer

Tracking Work (Tasks) to Meet Service Agreements

- What is a Service Agreement?
- Tricks for meeting outrageous service agreements
  - Spread out work over time and people
  - Monitor and manage tasks daily

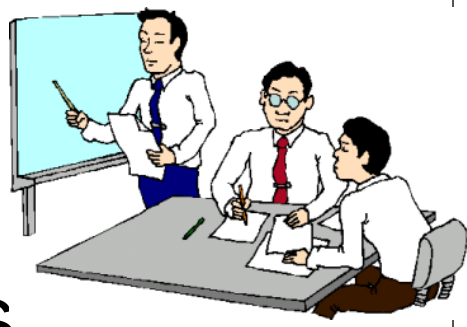


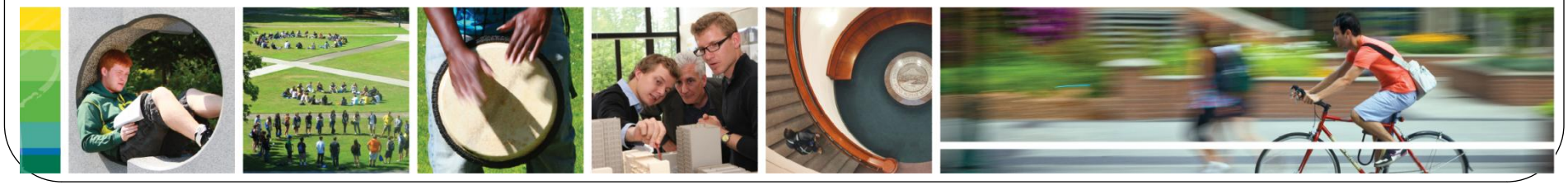
Spread out work…

- Over time (articulate credit upon application rather than at admission)
- Over people (10 front-line staff plus some lead workers)
- Through an alpha split to provide feeling of ownership to staff
- By using students to open/scan incoming documents

Monitor and Manage Tasks Daily

- Run tasks stats out of document imaging/use excel macro to produce pivot table of daily tasks
- Review Indexing counts
- Review Major changes counts
- Send via email to managers every morning

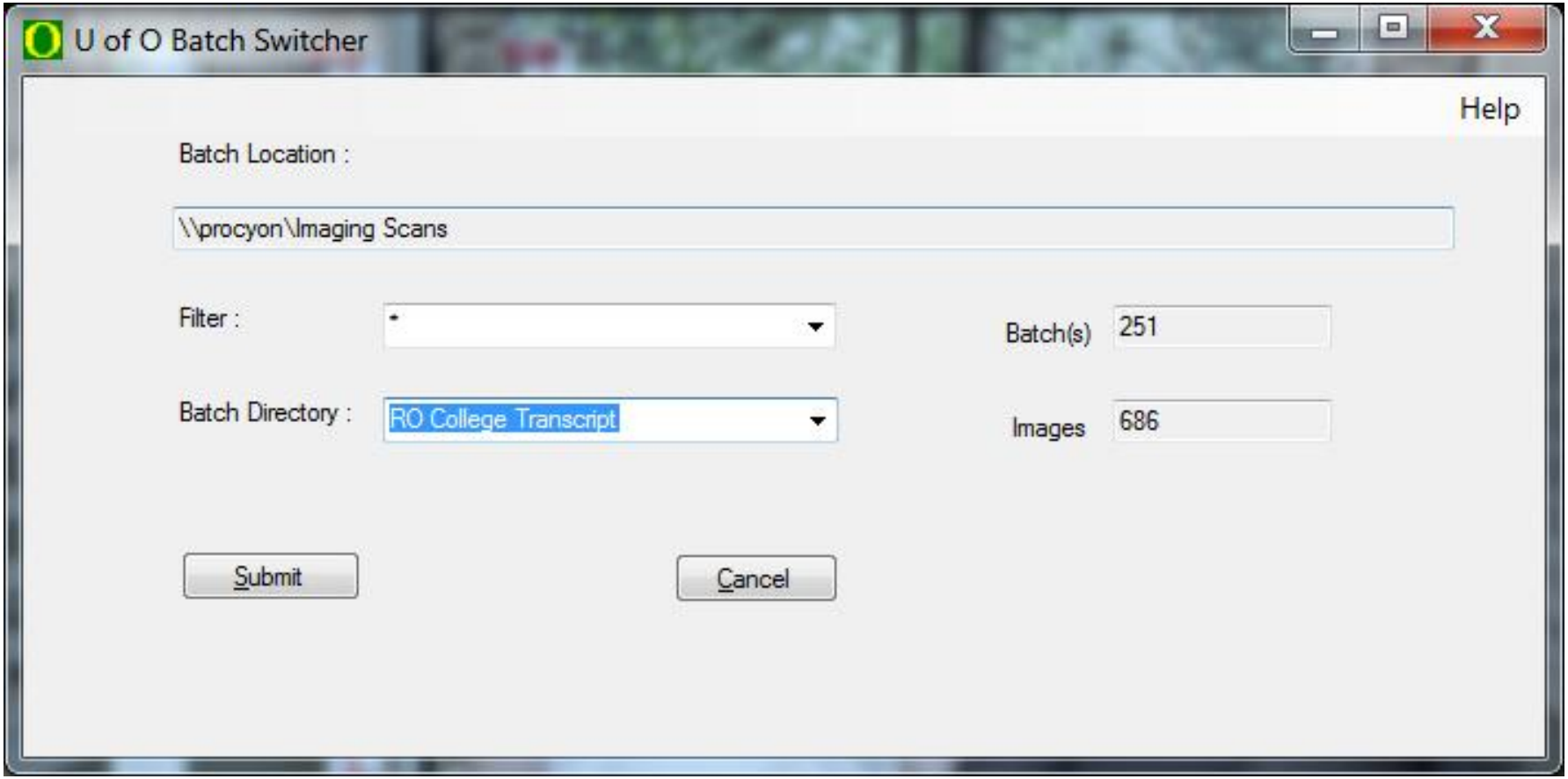




Pivot of Tasks from Imaging

Count of Process ID	Net Days			
TaskAssignedTo	2	3	5	Grand Total
Axxxxxxxxx	18			18
Fxxxxxxxxx	5	1	2	8
Jxxxxxxxxx	10	2		12
Cxxxxxxxxx		2	1	3
Lxxxxxxxxx	2			2
Mxxxxxxxx	5			5
Txxxxxxxx	3			3
Rxxxxxxxx	2			2
Grand Total	45	5	3	53

Scanned Images Counts



Sent by email to managers daily

- RO College Transcript: 74
- RO Current: 3
- RO Priority: 4
- PDF Transcripts: 2

- Major Changes:

- Group 1: 22
- Group 2: 10

Month-End Report

	0	1	2	3	4	5	6	7	Tot	% by User	Avg Days
Axxx	36	21	10	14	7	12	16		116	10.9%	2.3
Bxxx	52	22			11	26	1		112	10.5%	1.8
Fxxx	6	3				1			10	0.9%	0.8
Jxxx	22	27	18	17	11	36	8		139	13.1%	2.8
Kxxx	4	3		1		1	2	2	13	1.2%	2.8
Cxxx	23	32	6	12	5	14	16		108	10.1%	2.5
Lxxx	52	20	2	21	9	13	4		121	11.4%	1.8
Mxxx	54	44	8	14	6	1			127	11.9%	1.0
Nxxx	51	25	1	8	1	10	10		106	10.0%	1.6
Sxxx	39	24	7	1	16	6	2		95	8.9%	1.5
Txxx	2		1					1	4	0.4%	7.7
Yxxx	50	38	5	4	2	12	3		114	10.7%	1.3
Total	**391**	**259**	**58**	**92**	**68**	**132**	**62**	**3**	**1065**		
%	36.7%	24.3%	5.4%	8.6%	6.4%	12.4%	5.8%	0.3%			
Cum%	36.7%	61.0%	66.5%	75.1%	81.5%	93.9%	99.7%	100%			

Dashboard – track by month

	Day 0	Day 1	Day 2	Day 3	Day 4	Day 5	Day 6	Day 7
J-14	21.5%	47.4%	64.3%	72.1%	79.5%	91.0%	98.7%	99.8%
F-14	18.3%	45.9%	61.3%	74.7%	86.8%	93.8%	99.7%	100.0%
M-14	4.3%	16.7%	33.3%	48.4%	60.5%	78.7%	99.6%	100.0%
A-14	8.6%	23.4%	36.3%	48.0%	54.3%	74.0%	99.5%	100.0%
M-14	11.7%	24.6%	34.8%	49.6%	62.1%	74.9%	93.2%	99.5%
J-14	18.2%	38.1%	53.8%	65.4%	73.1%	85.9%	98.8%	99.9%
J-14	10.6%	39.6%	55.9%	65.6%	78.9%	91.4%	99.5%	100.0%
A-14	38.6%	61.9%	70.7%	82.8%	91.6%	97.6%	99.7%	100.0%
S-14	43.1%	71.4%	77.0%	86.0%	92.2%	97.6%	99.8%	100.0%
O-14	26.9%	58.9%	70.6%	81.6%	91.1%	97.6%	99.8%	100.0%
N-14	36.7%	61.0%	66.5%	75.1%	81.5%	93.9%	99.7%	100.0%
D-14	47.2%	79.8%	90.9%	95.0%	97.0%	98.8%	100.0%	100.0%

Dashboard – track by month

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D-14	47.2%	79.8%	90.9%	95.0%	97.0%	98.8%	100.0%	100.0%

UNIVERSITY OF OREGON

Making and Storing Equivalencies

Tips for Making /Storing Equivalencies

- Authority (get some)
  - Create all lower-division equivs without question/input from faculty
    - Some direct course-to-course equivs
    - Some “electives” course equivs with “smart numbers”
  - Create all upper-division direct course-to-course equivs that are obvious
  - Create non-obvious upper-division courses with subject code and “smart numbers”

Smart Subjects and Numbers

- Used to drive transfer courses to clear specific one or more degree requirements in the degree audit (show smart number and title)
- On Transfer Evaluation, show
  - 1XXT
  - 2XXT (where the number is the level and the T means Transfer)

Smart Subjects and Numbers

- **Arts and Letters**
- 100T, 200T, 300T (A&L Group)
- 131T, 231T, 331T (A&L/AC)
- 132T, 232T, 332T (A&L/IP)
- 133T, 233T, 333T (A&L/IC)

AC/IP/IC are three multi-cultural designations.

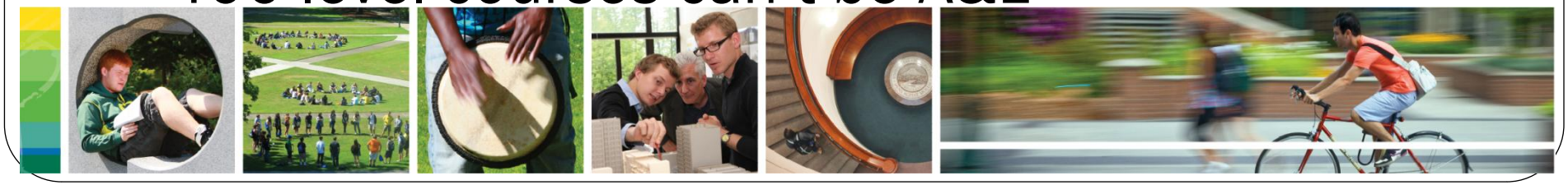
400-level courses can't be A&L

Smart Subjects and Numbers

- **Social Sciences**
- 110T, 210T, 310T (Soc Sci Group)
- 151T, 251T, 351T (SSC/AC)
- 152T, 252T, 352T (SSC/IP)
- 153T, 253T, 353T (SSC/IC)

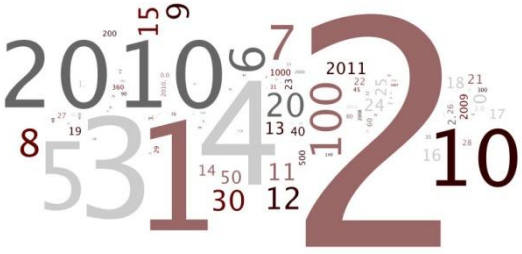
AC/IP/IC are three multi-cultural designations.

400-level courses can't be A&L



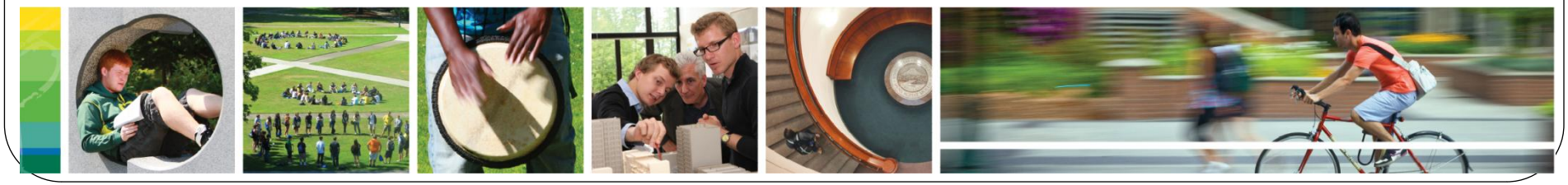
Smart Subjects and Numbers

- Wash. Rinse. Repeat.
  - Sciences
  - Math and Computer Info Sciences
  - Multi-cultural only
  - Writing
  - Languages we do not teach



Smart Subjects and Numbers

- What about Non-Transferrable?
  - Course Number: NT 100
  - Course Title: Non-transferrable
    - Shows on articulation report
    - Shows on degree audit (not used bucket)
  - Decreases phone calls/emails



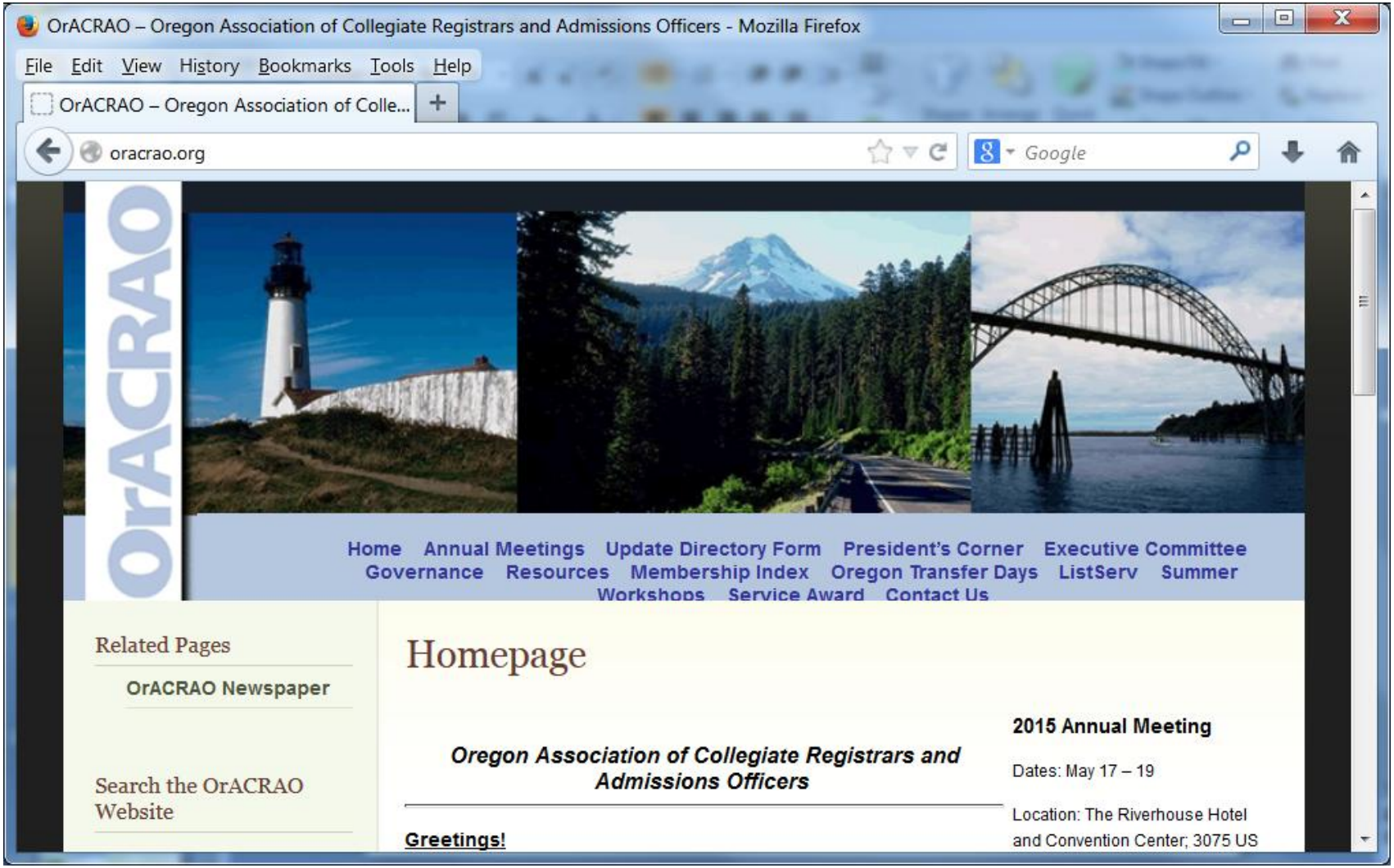
Tips for Making /Storing Equivalencies

- Tools (get some)
  - CollegeSource TES (transfer equivalency system) to find info
  - Banner to store equivs (or DARS or even Excel! SAVE your work so you/others can use it again!)
    - Speeds up your work
    - Assures consistent credit award for each student
  - OrACRAO Template

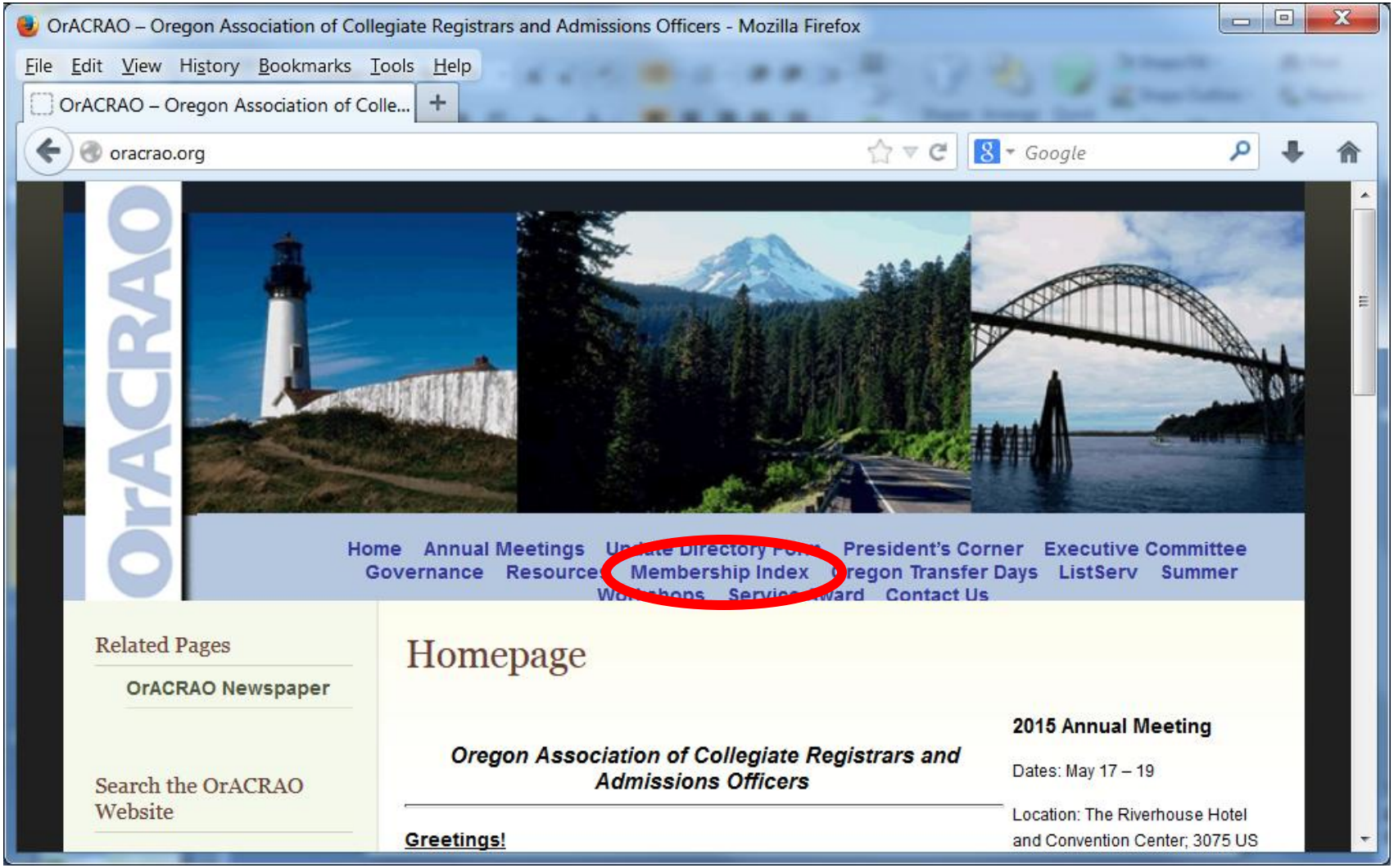
College Source (TES)

- Annual Subscription Service
- Searchable database
  - Catalog course descriptions
- Routing capabilities (in case you need faculty sign-off)
- Compare feature (compare another college's current and prior catalog to see what is different)

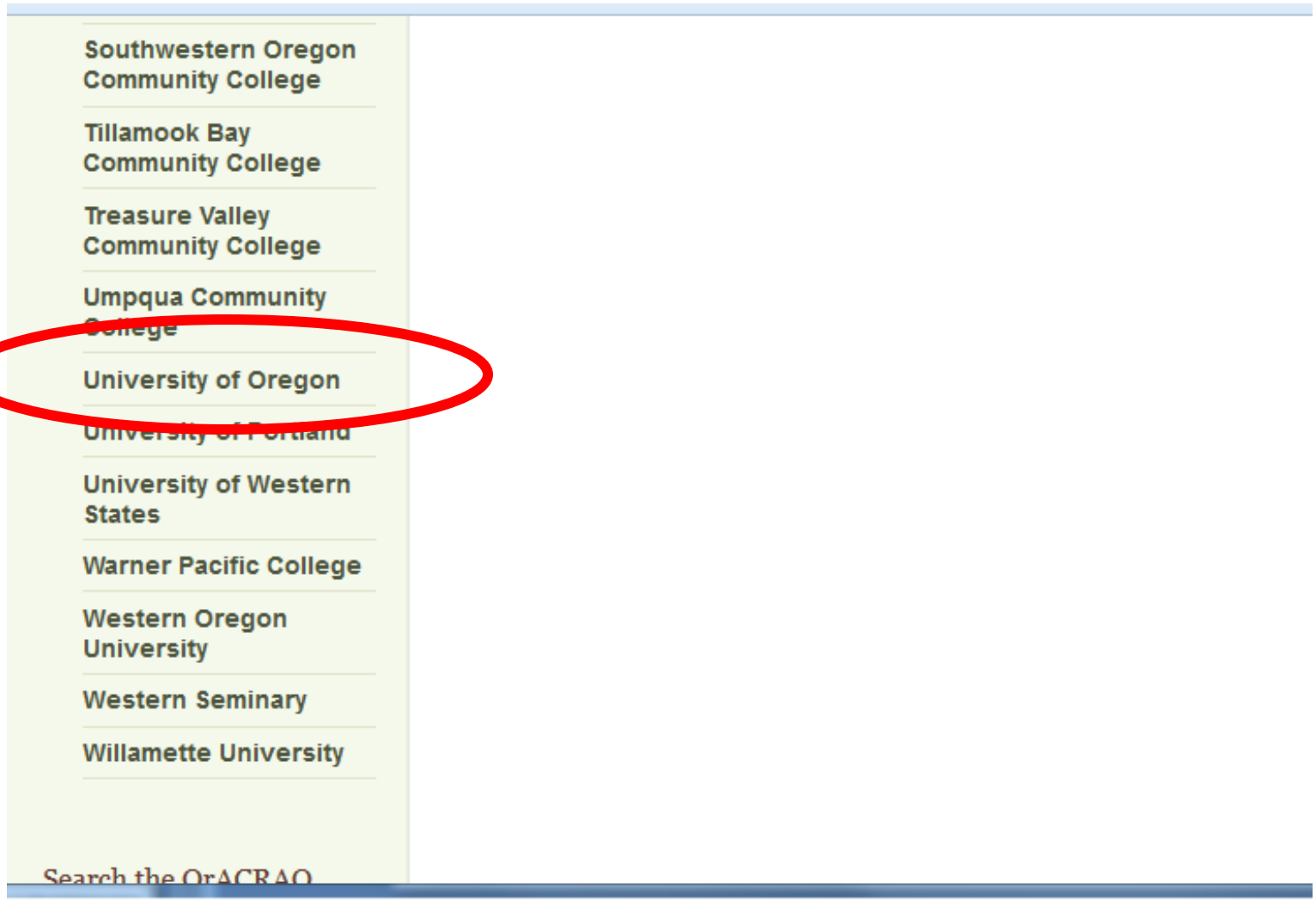
OrACRAO Template (oracrao.org)



OrACRAO Template (oracrao.org)



OrACRAO Template



OrACRAO Template

OrACRAO Template

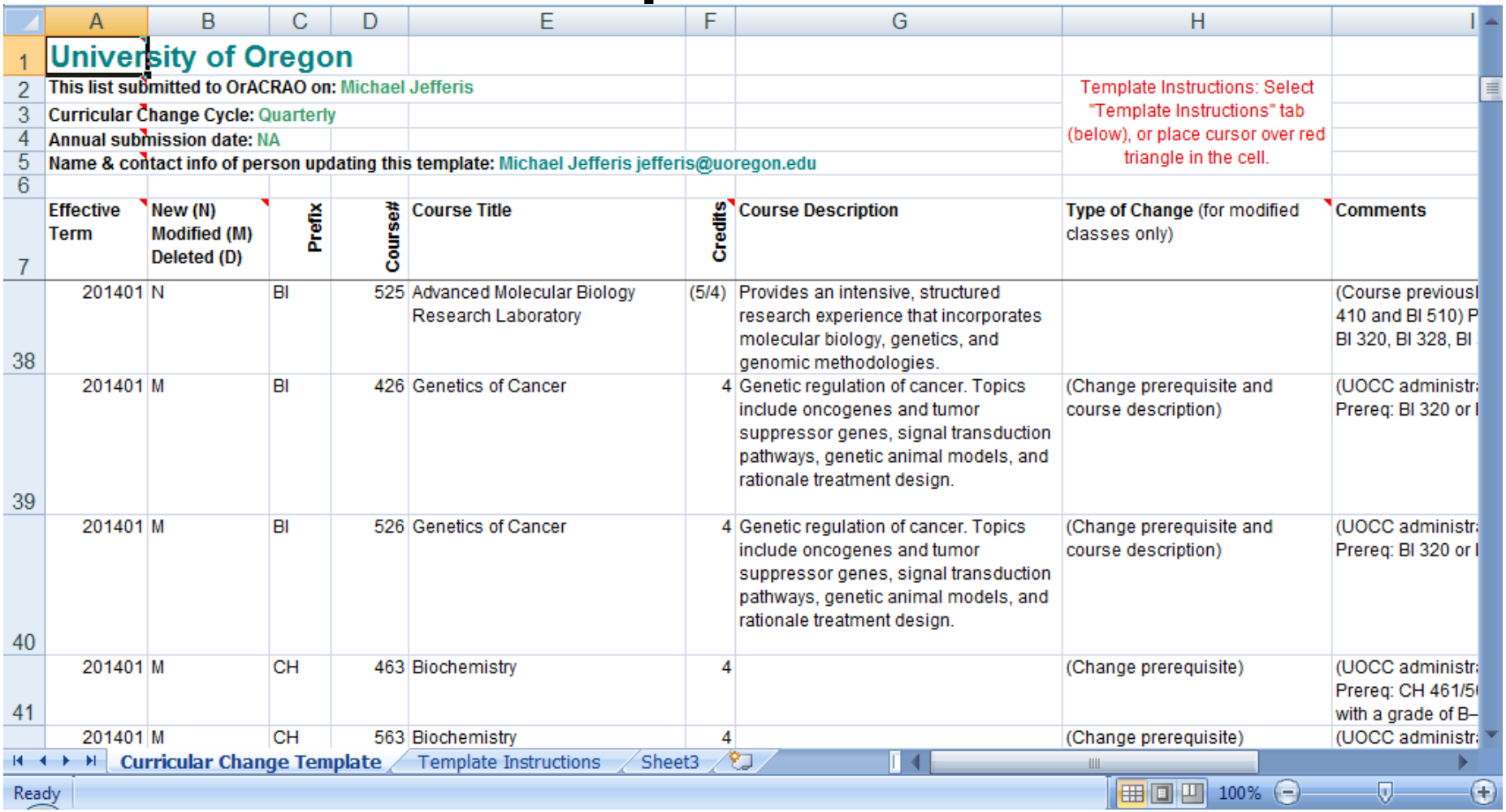
Oregon Association of Collegiate Registrar and Admissions Officials (OrACRAO) Template Reports

Showing 1 to 8 of 8 entries

Search:

Year	Fall	Winter	Spring
2006-2007	Fall 2006	Winter 2007	Spring 2007
2007-2008	Fall 2007	Winter 2008	Spring 2008
2008-2009	Fall 2008	Winter 2009	Spring 2009
2009-2010	Fall 2009	Winter 2010	Spring 2010
2010-2011	Fall 2010	Winter 2011	Spring 2011
2011-2012	Fall 2011	Winter 2012	Spring 2012
2012-2013	Fall 2012	Winter 2013	Spring 2013
2013-2014	Fall 2013	Winter 2014	Spring 2014

OrACRAO Template



	A	B	C	D	E	F	G	H	I
1	University of Oregon								
2	This list submitted to OrACRAO on: Michael Jefferis							Template Instructions: Select "Template Instructions" tab (below), or place cursor over red triangle in the cell.	
3	Curricular Change Cycle: Quarterly								
4	Annual submission date: NA								
5	Name & contact info of person updating this template: Michael Jefferis jefferis@uoregon.edu								
6									
7	Effective Term	New (N) Modified (M) Deleted (D)	Prefix	Course#	Course Title	Credits	Course Description	Type of Change (for modified classes only)	Comments
38	201401	N	BI	525	Advanced Molecular Biology Research Laboratory	(5/4)	Provides an intensive, structured research experience that incorporates molecular biology, genetics, and genomic methodologies.		(Course previousl 410 and BI 510) P BI 320, BI 328, BI
39	201401	M	BI	426	Genetics of Cancer	4	Genetic regulation of cancer. Topics include oncogenes and tumor suppressor genes, signal transduction pathways, genetic animal models, and rationale treatment design.	(Change prerequisite and course description)	(UOCC administr Prereq: BI 320 or
40	201401	M	BI	526	Genetics of Cancer	4	Genetic regulation of cancer. Topics include oncogenes and tumor suppressor genes, signal transduction pathways, genetic animal models, and rationale treatment design.	(Change prerequisite and course description)	(UOCC administr Prereq: BI 320 or
41	201401	M	CH	463	Biochemistry	4		(Change prerequisite)	(UOCC administr Prereq: CH 461/5 with a grade of B–
	201401	M	CH	563	Biochemistry	4		(Change prerequisite)	(UOCC administr

Curricular Change Template | Template Instructions | Sheet3

Ready 100%

OrACRAO Template

38	201401	N	BI	525	Advanced Molecular Biology Research Laboratory
39	201401	M	BI	426	Genetics of Cancer
40	201401	M	BI	526	Genetics of Cancer
41	201401	M	CH	463	Biochemistry
	201401	M	CH	563	Biochemistry

Curricular Change Template | Template Instructions | Sheet1

Ready

Save Your Work

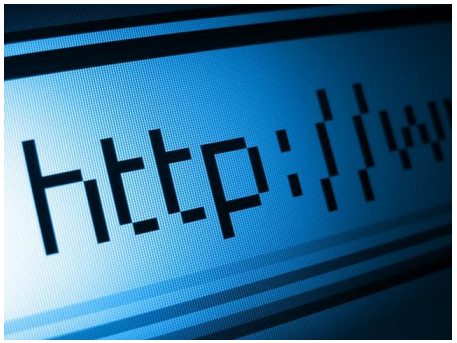
- Banner or DARS or Excel
- Re-use equivalencies:
  - For future incoming transfer work
  - For posting to the Web

UNIVERSITY OF OREGON

Tips for Serving Equivalencies

Tips for Serving Equivalencies

- Technology (get some)
  - Serve an equivalency search on your web site
    - Eliminates calls and emails from students, advisers, parents
    - Helps students plan their transfer



Transfer Course Equivalencies

Transfer Course Equivalencies | Individual Course Lookup

This page will help you determine how courses from other schools will transfer to the University of Oregon.

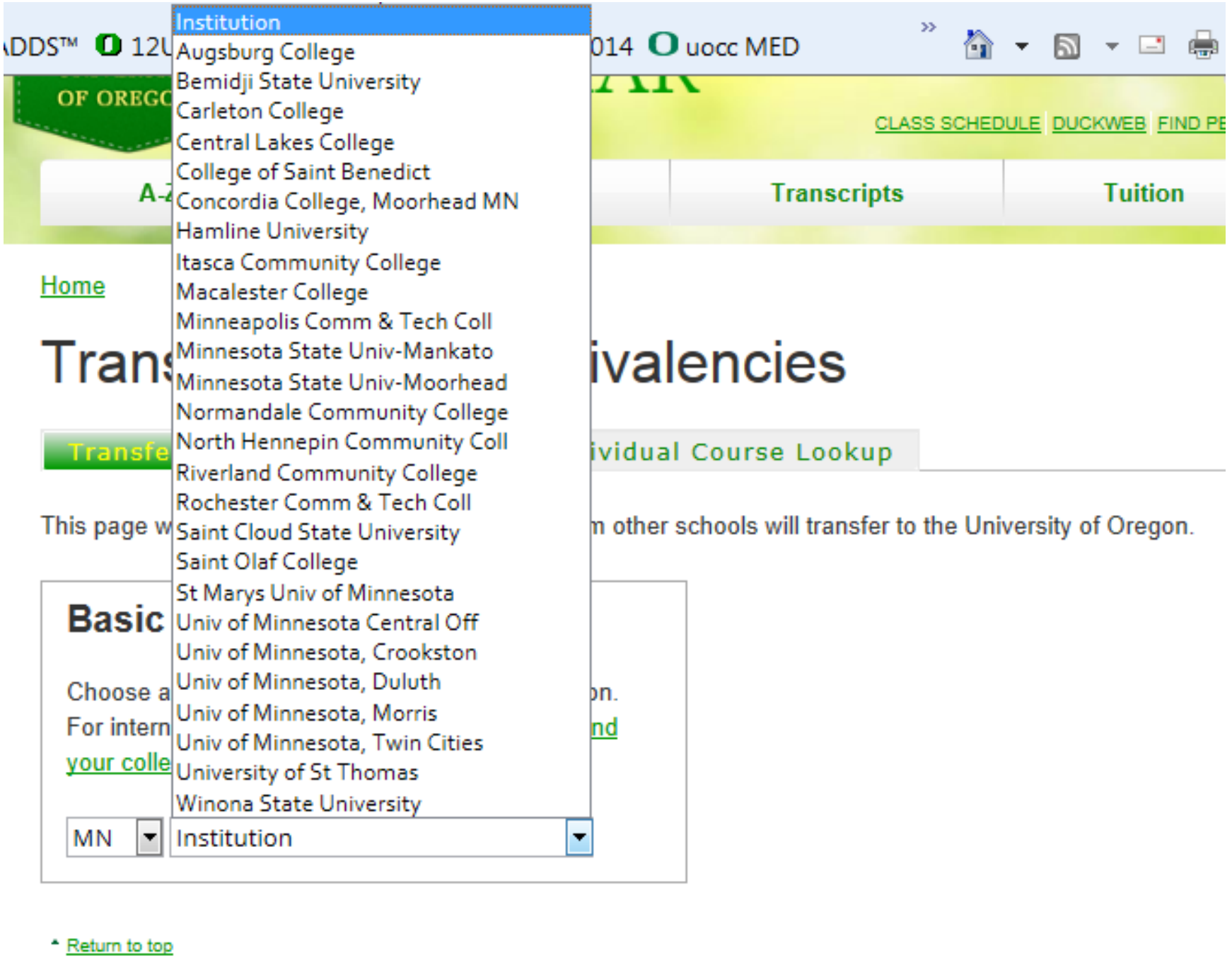
Basic Search:

Choose a state or province first, then an institution.
For international institutions, select "XX". Can't find your college in the list? Click here!

[ ] Institution

Quick Links

- Quick link to Oregon schools
- Quick link to International schools
- Individual Course Lookup


Institution
Augsburg College
Bemidji State University
Carleton College
Central Lakes College
College of Saint Benedict
Concordia College, Moorhead MN
Hamline University
Itasca Community College
Macalester College
Minneapolis Comm & Tech Coll
Minnesota State Univ-Mankato
Minnesota State Univ-Moorhead
Normandale Community College
North Hennepin Community Coll
Riverland Community College
Rochester Comm & Tech Coll
Saint Cloud State University
Saint Olaf College
St Marys Univ of Minnesota
Univ of Minnesota Central Off
Univ of Minnesota, Crookston
Univ of Minnesota, Duluth
Univ of Minnesota, Morris
Univ of Minnesota, Twin Cities
University of St Thomas
Winona State University
CLASS SCHEDULE
DUCKWEB
Transcripts
Tuition
Home
Transfe
ividual Course Lookup
This page w
m other schools will transfer to the University of Oregon.
Basic
Choose a
on.
For intern
nd
your colle
MN
Institution
Return to top

Transfer Course Equivalencies | Individual Course Lookup

This page will help you determine how courses from other schools will transfer to the University of Oregon.

Basic Search:

Choose a state or province first, then an institution. For international institutions, select "XX". Can't find your college in the list? Click here!

MN | Saint Olaf College

Quick Buttons:

Return complete list of classes.

Current Catalog | View All Historic Records

Advanced Search:

Enter all or part of a word or number; wildcards are not needed.

Subject:

Course:

Title:

Group Codes:

Include Historic Records in Search

Submit Query | Reset

Search Results

Saint Olaf College			University of Oregon Equivalent			
Subject	Course	Title	Subject	Course	Title	Group Codes
AMCO	101	Freedoms: 1607-1865	HIST	110T	Social Science Group	SS
AMCO	102	Democratic Vistas 1800-1900	HIST	110T	Social Science Group	SS
AMST	100	Perspec Amer Culture	HIST	151T	Social Science Group, AC	SS,AC
APMU	102	Voice 1-30	MUS	1AAT	MUS 100-level Course	
APMU	104	Piano 1 - 30	MUS	1AAT	MUS 100-level Course	
APMU	106	Organ 1 - 30	MUS	1AAT	MUS 100-level Course	
APMU	134	Piano 1-30	MUS	1AAT	MUS 100-level Course	
APMU	152	Voice 1-30	MUS	1AAT	MUS 100-level Course	
APMU	16	Flute 2-30	MUP	1AAT	MUP 100-level Course	
APMU	2	Voice 1-30	MUS	1AAT	MUS 100-level Course	
APMU	4	Piano 1-30	MUP	1AAT	MUP 100-level Course	
ART	1	Women in Visual Arts	ARH	132T	Arts & Letters Group, IP	IP,AL
ART	103	Foundation 3-D Media	ART	1AAT	ART 100-level course	
ART	111	Found Perceptual Drawing	ART	233	Drawing	
ART	112	Found Conceptual Drawing	ART	233	Drawing	

UO Study Abroad Course Equivalencies

This page will help you determine how courses from UO Study Abroad Programs will apply toward your UO requirements.

To begin, select the **region**, **country**, and the **program or location** below. For more information about the region, country, or program, click on the hyperlinks beneath each column. For additional information, see Frequently Asked Questions.

Choose a region, country and program/location:

- Any -

▸ Advanced search options

Go Reset

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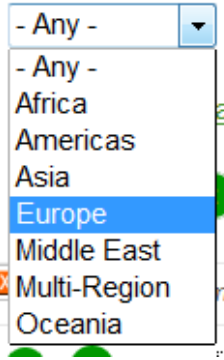

arch options

message saying, "The file you are trying to open is in a different format than specified by the file extension," just click YES.)

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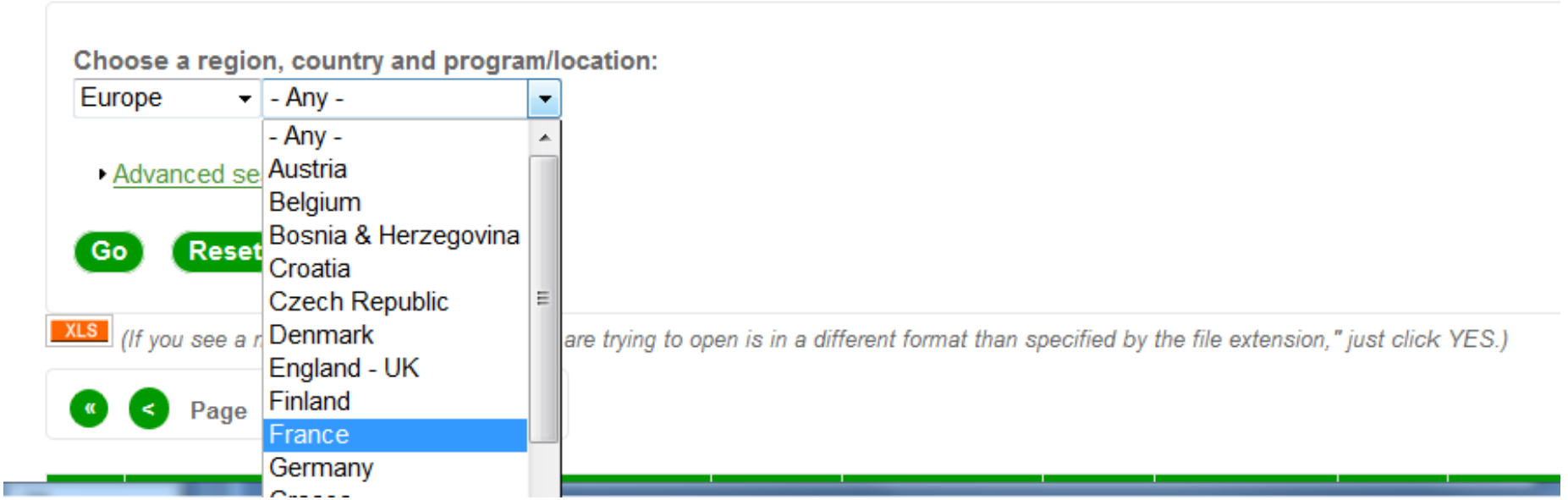

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Choose a region, country and program/location:

Europe | France | Angers

- Any -
- Angers
- Lyon - ESDES
- Lyon - ILCF
- Lyon - SELF
- Lyon I - Claude Bernard
- Lyon II - Lumière
- Lyon III - Jean Moulin
- Reims
- Sciences Po
- University of Poitiers

Advanced search options

Go Reset

XLS *(If you see a message saying, "The file you ... nt format than specified by the file extension," just click YES.)*

Region	Country	Program/Location	Foreign Co	Subject and Title	Recorded As	Group/Language Satisfying	Satisfies UO Course	Major/Minor Notes

Region	Country	Program/Location	Foreign Course Title	Foreign Course Number	UO Subject and Title	Recorded As	Group/Language Satisfying	Satisfies UO Course	Major/Minor Notes
Europe	France	Angers	20th Century Literature (Moyen 2ème degré)		FR: 20th Century Literature	OANG 388	AL, IC	ELEC	FR: elective credit
Europe	France	Angers	Anjou under the Occupation		HIST: Anjou under the Occupation				HIST: Major approved
Europe	France	Angers	Anjou under the Occupation		HIST: Anjou under the Occupation	OANG 388		ELEC	HIST: Major approved
Europe	France	Angers	Compréhension écrite-1er degré		FR: Reading Comprehension				FR: elective credit
Europe	France	Angers	Dreaming in French: Culture, Language, and Identity		ENG: Dreaming in French				ENG: elective credit
Europe	France	Angers	Dreaming in French: Culture, Language, and Identity		ENG: Dreaming in French	OANG 388	IC	ELEC	ENG: elective credit
Europe	France	Angers	English-French Translation (Moyen 2ème degré)		FR: Translation	OANG 388		ELEC	FR: elective credit
Europe	France	Angers	Expression théâtrale -1er degré		FR: Theatrical Expression				FR: elective credit
Europe	France	Angers	Francois Rabelais: Satire as Social Commentary		COLT: Theories of Novel				COLT: M Minor a

Back to to

The following information is intended for students entering Fall 2014 and beyond.

After completing an Advanced Placement course, high school students have the option of paying a fee to take the appropriate examination. Test scores determine the type and number of credits the UO can award. See Alternative Ways to Earn Credit for ordering instructions.

Post AP, IB, and CLEP Credit info, too!

The following AP scores generate university credit:

Subject	Score	CR	Courses Awarded	Groups
Art History	4 or 5	8	ARH 204, 206	A&L
Biology	4 or 5	12	BI 211 plus two Biology courses	SC
Calculus AB	3 4 5	4 8 8	One MATH course MATH 251 and one MATH course MATH 251, 252	SC, BS Math SC, BS Math SC, BS Math
Calculus BC	3 4 or 5	8 12	MATH 251, 252 MATH 251, 252, 253	SC, BS Math SC, BS Math
Chemistry[1]	4 or 5	12	CH 221, 222, 223	SC
Chinese Language & Culture	3, 4, or 5	15	CHN 201, 202, 203	A&L, BA Lang
Comparative Government & Politics	4 or 5	4	PS 204	SS
Computer Science A	4 or 5	4	CIS 210	SC, BS Math
Economics: Macroeconomics	3, 4, or 5	4	EC 202	SS
Economics: Microeconomics	3, 4, or 5	4	EC 201	SS
English Language and Composition	3, 4 or 5	4	WR 121	COMP
English Literature and Composition	3, 4 or 5	4	ENG 104	A&L
Environmental Science	3, 4, or 5	4	ENVS 202	SC

Back to to

115%

UO credit is awarded for the following IB exams:

Post AP, IB, and CLEP Credit info, too!

Higher Level Exam (Jump to Standard Level Exam)

Subject - Higher Level	Score on Higher Level Exam	Credit	UO Course Equivalent	Satisfies Group Requirements
Social & Cultural Anthropology	5	4	ANTH 161	SS,IC
Visual Arts (Art History)	5	4	Art History (1 course)	A&L
		4	Art History (1 course)	Elective
Biology	5	12	BI 211,212,213	SC
Business	5	4	BA 101	SS
Chemistry	5	12	CH 221,222,223	SC
Computer Science	5	8	CIS 210, 211	SC
Dance	5	4	DAN 251	A&L
		4	Dance (1 course)	Elective
Design Technology	5	4	Digital Arts (1 course)	Elective
Economics	5	8	EC 201,202	SS
English A Literature	5	8	WR 121,122	COMP
		4	ENG 104	A&L
English A Language & Literature	5	8 4	WR 121, 122 ENG 104	COMP A&L
Film	5	8	ENG 265, 266	A&L
Further Mathematics	5	12	MATH 251, 252, 243	SC, BS Math
		4	GEOG 141	SC

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Post AP, IB, and CLEP Credit info, too!

CLEP Score Chart

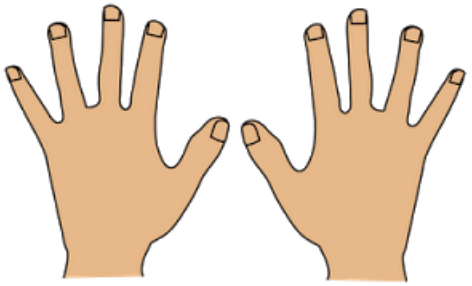
Subject Examinations	Passing Score	Credits	UO Course Equivalent	Satisfies Group Re
American Literature	55	4	English (one course)	A&L
Calculus	50	4	MATH 251	SC, BS MATH
Chemistry [4]	50	12	CH 221, 222, 223	SC
College-level French Language [5]	54 56 59	4 8 12	FR 201 FR 201, 202 FR 201, 202, 203	A&L A&L A&L, BA Lang
College-level German Language [5]	60	12	GER 201, 202, 203	A&L, BA Lang
College-level Spanish Language [5]	55 59 63	4 8 12	SPAN 201 SPAN 201, 202 SPAN 201, 202, 203	A&L A&L A&L, BA Lang
English Literature	55	4	English (one course)	A&L
Introductory Sociology	74	4	SOC 204	SS
Principles of Microeconomics	60	4	EC 201	SS
Principles of Macroeconomics	60	4	EC 202	SS

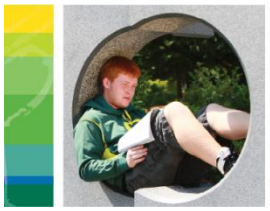
Footnotes

4. Students should complete CH 227, 228, 229 (labs) prior to organic chemistry or should complete honors chemis 226 with labs 237, 238, 239 prior to organic chemistry.
5. Native speakers must confirm with the Office of the Registrar that they are eligible to earn credit in their own

UNIVERSITY OF OREGON

Hands-Free EDI Processing



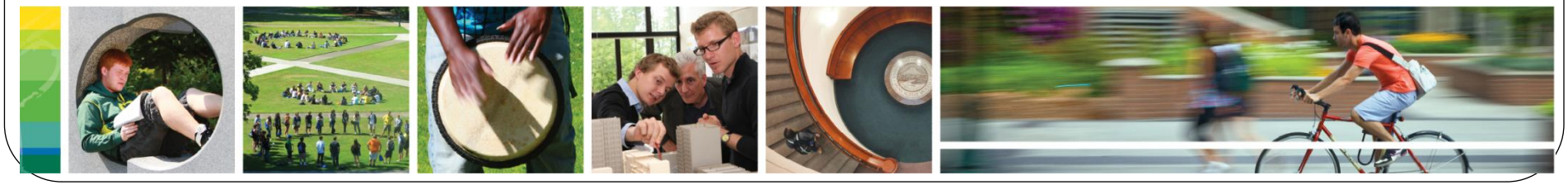


“Hands Free” EDI Processing

- Our Server pings the EDI server every 20 minutes; new documents load into SHAEDIS
- Staff sort list, looking for “pending/not matched”
- Staff can view the document to determine if it is a HS or College Transcript

“Hands Free” EDI Processing

- If it belongs to us (i.e., it’s a college transcript), we use GOAMATCH to attach it to the right person record in Banner.
- We launch a “Route to Imaging” option (either directly to archive or to launch a workflow)
- Doc Imaging makes a picture of the doc, indexes it automatically, which fires off the workflows.

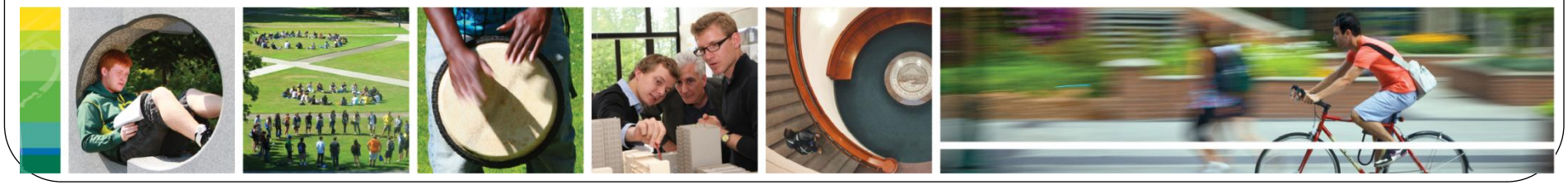


“Hands Free” EDI Processing

- When workflow is accepted, we check a few things (entry term, admissions holds) then with a keystroke or two, pulls the academic course data right onto SHATAEQ.
- We press the articulate button, and the equivalencies all pop in.
- We check credit totals and cum GPA on the transcript against Banner, then roll to history.

“Hands Free” EDI Processing

- We update the degree audit
- We launch a canned email message from Talisma telling the student that he/she can log into DuckWeb (Banner Self-serve) to view
  - How their credits transferred
  - How the classes will count toward their degree.

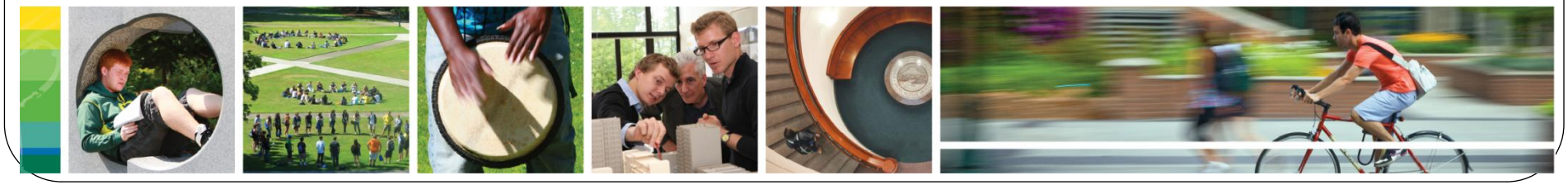


“Hands Free” EDI Processing

- Systems Used:
  - EDI Smart
  - Banner SIS
  - Singularity Document Imaging
  - Talisma CRM
  - DuckWeb Self-Serve

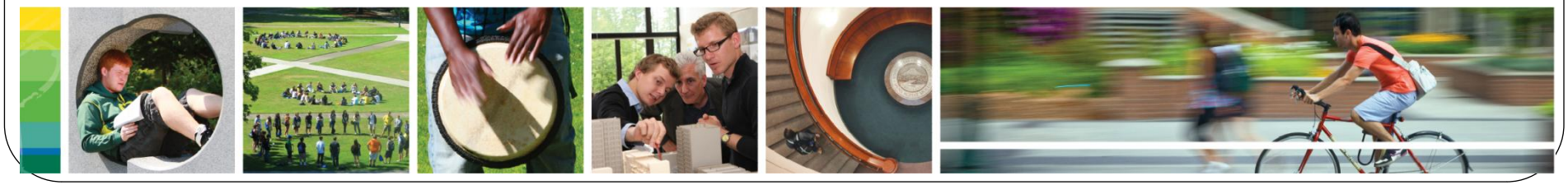
“Hands Free” EDI Processing

- 11 seconds
  (not that anyone is being timed!)



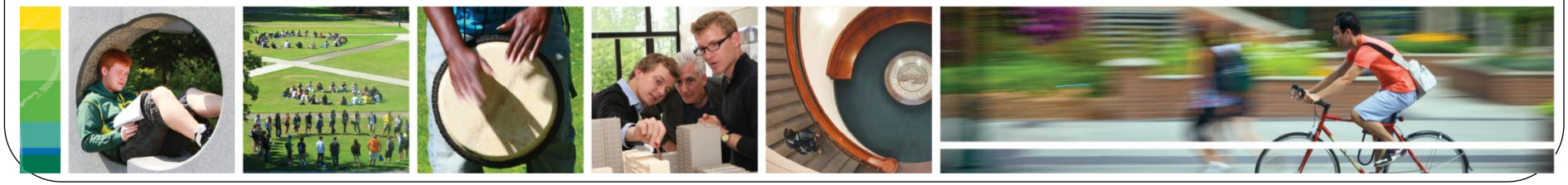
Trolling for More EDI Partners

- Leverage successful work processes by seeking out additional trading partners
  - Help others get started with EDI
  - Work with third-party providers to deliver electronic data in standard ways



Trolling for More EDI Partners

- Keep track of third-party providers
  - A serendipitous conversation at SACRAO led to another 2,200 transcripts annually arriving via EDI (Credentials)
  - How many more serendipitous conversations can be had???



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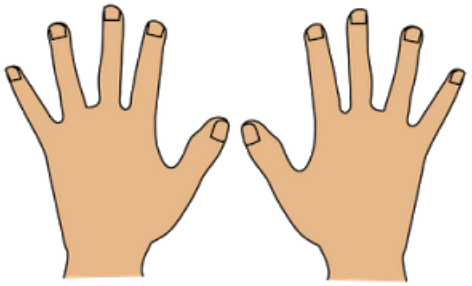
Hands-Free Reverse Transfer



“Hands Free” Reverse Transfer

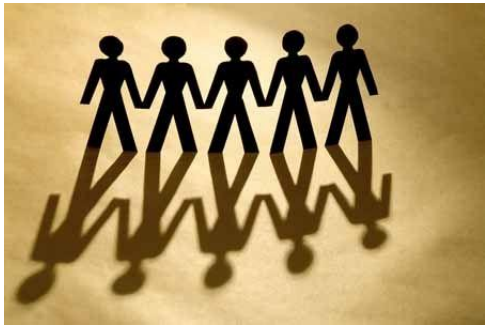
- Uses same “terms of exchange” as the PORT/Lumina Grant terms
  - 24 credits from the CC
  - 90 credits overall
  - Not applied to graduate at UO
  - Etc…
- Piloting with four partners (all EDI)

Lane CC

Linn-Benton CC

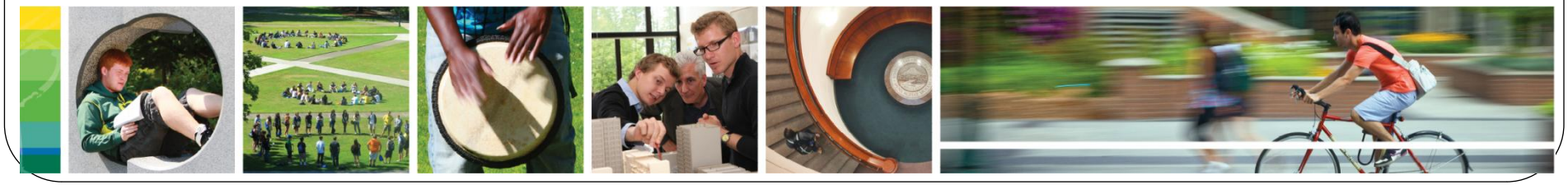
Portland CC

Mt Hood CC



“Hands Free” Reverse Transfer

- Supports the Governor’s 40-40-20 goal
- Student opts in through Self-Serve
  - Smart menu item on the Student Page
- Student who opt in:
  - Can “Send Transcript Now” OR
  - An EDI transcript will be sent at the end of every term in which the student earns credit until
    1) the student sends us a transcript with the AA Degree or
    2) until the student opts out of Reverse Transfer.
- EDI transcript notes “Reverse Transfer”



Reverse College Transfer

Based on your transfer credits and your UO credits, you are eligible for Reverse Transfer with your transfer institution(s) listed below. Select the college(s) to which you want your UO transcripts sent. Transcripts will automatically be sent at the end of every term during which you earn credit until the point in time that UO has received notice of an associate's degree (AA, AS, AAOT, etc.) from any community college.

Click here for more information about Reverse Transfer at the **University of Oregon**

Click here for more information about Reverse Transfer at **Mt. Hood Community College**, **Portland Community College**, and **Lane Community College**.

Eligible College	Opt In/Out	Change to
Lane Community College	In	Opt Out

Your transcripts will automatically be sent at the end of each term. If you would like to send one now, click on "Order Electronic Transcript" and your transcript will be sent today.

Order Electronic Transcript

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Order Electronic Transcript

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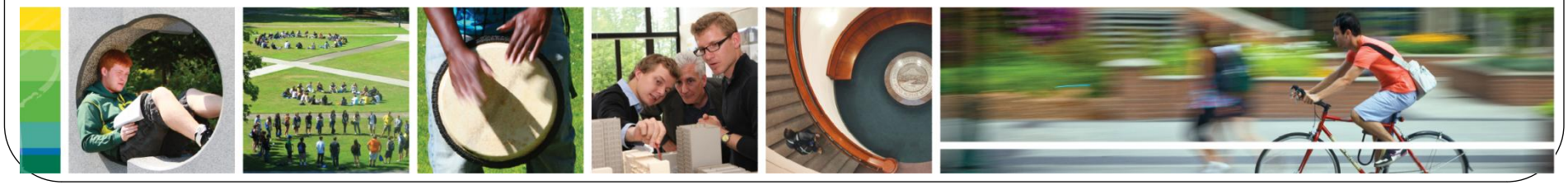
End of Term Job

- Schedule Job as part of End-of-Term Grade Processing
  - Or Run in Audit Mode anytime
  - Only Parameter is “Term”
- Job produces excel list of
  - All eligible students/email address
  - Whether each has opted in or not
- Job sends EDI Transcript to partner CC

Results

- Fall 2014:
  - Audit job ID'd 1,492 eligible
  - 132 opted in
- Winter 2015:
  - Audit job ID'd 1,814 eligible
  - 140 have opted in as of Jan 26



Looking Ahead for RT

- New Partners Wanted Now
  - Oregon CC's who are EDI partners

- New Partners Wanted Later
  - Oregon CC's who are not EDI partners

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Questions/Comments?

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Contact Me

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registrar.uoregon.edu