GUIDED PATHWAYS
Requirements PeopleSoft Demo

August 19 - 20, 2019
WHAT ARE THE 3CS AND MESSAGE CENTER?

• Checklists
  • List of to-do items required for a specific student

• Comments
  • Department specific or general student notes

• Communications
  • Used for sending and tracking letters, emails, phone calls and other communications

• Message Center
  • A specific communication tool used to send communication to the student via Student Homepage
PEOPLESOFETH CHECKLISTS

• List of items required for a student
  • Optional display to Students
  • Displays to Students as a “Task” List with “To-Do” items
  • Ability to include detailed description w/contact info, hyperlink, and links to other areas in self-service

• Can be assigned individually or in batch
  • Batch process can use population selection queries to pull applicable students

• Can assign another staff member to the checklist
TYPES OF CHECKLISTS

- Admissions
- Residency
- FA Processing
- Program Requirements
- Graduation Requirements
- Payment Plan requirements
- Veteran Requirements
### To Do List

<table>
<thead>
<tr>
<th>Task</th>
<th>Institution</th>
<th>Due Date</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personal Information Verification</td>
<td>Clark College</td>
<td>In Progress</td>
<td></td>
</tr>
<tr>
<td>Institutional Form</td>
<td>Tacoma CC</td>
<td>⚠️ Overdue</td>
<td>Initiated</td>
</tr>
<tr>
<td>Standard 2018-2019</td>
<td>Tacoma CC</td>
<td>⚠️ Overdue</td>
<td>Initiated</td>
</tr>
<tr>
<td>Military Info</td>
<td>Tacoma CC</td>
<td></td>
<td>Initiated</td>
</tr>
</tbody>
</table>
Task Details

Military Info

Institution  Tacoma CC

In order to determine your admissions residency your military information is required.
PEOPLESOFTHF COMMENTS

- Allows staff to track important notes regarding a student’s record
  - Advising notes will be discussed this afternoon
- Does not display to students
- Added to an individual student or in batch
TYPES OF COMMENTS

• Admissions
• Enrollment
• Student Program
• FA Processing
• Student Account
• Collections
• Veterans Benefits

• Academic Standing
• General
• Other Special Populations
Variable Data

Academic Career: UGRD
Term: 2197
Class Number: 1263

OK  Cancel
COMMUNICATION OPTIONS

• PeopleSoft Communications
  • Used for sending and tracking letters, emails, phone calls and other communications

• HighPoint Message Center
  • A specific communication tool used to send messages to the student via Student Homepage
PEOPLESOF COMMUNICATIONS

• Can be sent individually or in batch
  • Batch process can use population selection queries to pull applicable students
  • Ability to schedule communication generation & recurrence

• Can be assigned along with Comments or Checklists
• Sent directly to the recipient’s email
• Ability to include/access a PDF copy of letter
• Also used to generate hard copy letters
HIGHPOINT MESSAGE CENTER

- Sent to Message Center in student self-service and mobile application
- Can be sent individually or in batch
  - Batch process can use population selection queries to pull applicable students
  - Ability to schedule message sending & recurrence
- View Read/Unread status
- Student replies and threaded conversation (optional)
HIGHPOINT MESSAGE CENTER – CONT.

• Nightly email sent to students with a new unread Message Center message
• Secure message requiring log in to Student Homepage
• Easier individual student communications
• Easier configuration/maintenance
TYPES OF COMMUNICATIONS

- Admissions
- Academic Standing
- Assignment of Tasks
- Program Requirements
- Enrollment
- Waitlist
- Graduation
- Transfer Credit
- Commencement

- FERPA notifications
- Tuition Due
- 1098-T communications
- Collections
- Drop for non-payment
- FA Awards
- FA requirements
- SAP
<table>
<thead>
<tr>
<th>TACOMA CC</th>
<th>Aug 15</th>
</tr>
</thead>
<tbody>
<tr>
<td>Example Subject Line</td>
<td></td>
</tr>
<tr>
<td>Petition - Administrative</td>
<td></td>
</tr>
</tbody>
</table>

**Example Subject Line**

Regarding: Petition - Administrative

Institution: Tacoma CC

This is an example Message Center message. This functionality includes font/paragraph formatting, hyperlinking, tables, and photo upload capability.
SERVICE INDICATORS

• Service Indicators (SI’s) are used to restrict or enables services to students
  • Similar to legacy Unusual Action (UA) codes
• SI’s can be positive or negative/punitive
  • Positive – prevent enrollment cancellation
  • Negative – enrollment hold for past due balance, disbursement hold on FA funds
SERVICE INDICATORS – CONT.

• Assigned and released either for an individual student or in batch

• Each college configured with a standard set of codes and can add additional codes for local business needs

• College can decide whether SI is visible to students
  • Ability to include detailed description w/contact info, hyperlink, and links to other areas in self-service
<table>
<thead>
<tr>
<th>Hold</th>
<th>Institution</th>
<th>Department</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delinquent Payment</td>
<td>Clark College</td>
<td>ACCOUNTING SERVICES</td>
</tr>
<tr>
<td>Past Due Balance</td>
<td>Clark College</td>
<td>ACCOUNTING SERVICES</td>
</tr>
<tr>
<td>Past Due Balance</td>
<td>Clark College</td>
<td>ACCOUNTING SERVICES</td>
</tr>
<tr>
<td>Prevent Enrollment Canc</td>
<td>Cascadia College</td>
<td>Finance</td>
</tr>
</tbody>
</table>
Hold Details

Past Due Balance

- Institution: Clark College
- Department: ACCOUNTING SERVICES
- Reason: Past Due Balance
- Start Date: 08/08/2019

Our records indicate that you have a past due balance on your account. Please contact the Cashier's Office at 360-982-2177, or visit the office in Gasier Hall, to make a payment.

Make a Payment
UPLOADING DOCUMENTS

• Customization to the system that allows students to upload important documents through self-service
• Staff can also upload documents on behalf of student
• Global list of document categories, but college determines which types of documents are available for upload
  • Example – residency forms, unofficial transcripts, petitions
Upload Documents

Empl ID: 201333301  Lady Bird Johnson

Document Group: WA140  Clark Coll

<table>
<thead>
<tr>
<th>Document Upload</th>
<th>Personalize</th>
<th>Find</th>
<th>Attach</th>
<th>View</th>
</tr>
</thead>
<tbody>
<tr>
<td>Document Class:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Document Class:**

- Document Type
- File Name

- [Attach]
- [View]

[Save]

Upload Documents | Document Audit
### Upload Documents

**Empl ID:** 201333301  Lady Bird Johnson  
**Document Group:** WA140  Clark Coll

#### Document Upload

<table>
<thead>
<tr>
<th>Document Type</th>
<th>File Name</th>
<th>Reviewed</th>
<th>Attach</th>
<th>View</th>
</tr>
</thead>
<tbody>
<tr>
<td>CBAS_APP</td>
<td>Example_Document.docx</td>
<td></td>
<td>Attach</td>
<td>View</td>
</tr>
</tbody>
</table>

[Save](#)  

[Upload Documents](#) | [Document Audit](#)
STUDENT ACTIVITY GUIDES

• Step-by-step task for students to complete via self-service
• Tasks and sequence are globally designed but have additional functionality each college can opt to use
• Assigned locally by each college - colleges can determine applicable usage, frequency
• Shows as a “To Do” on students’ landing page
PERSONAL INFORMATION VERIFICATION

• Prompts students to verify and/or update* their bio/demo information
  • Name
  • Contact Details – email and phone
  • Addresses
  • Emergency Contacts
  • Privacy Restrictions

*Information available to be updated via self-service is based on globally agreed upon restrictions.
BENEFITS

• Student has one set of bio/demo information, regardless of how many colleges they attend
  • All colleges and all departments will have the most up-to-date info
• Eliminates need for students to navigate to necessary pages on their own
• Ensures batch communications processes send to the most accurate, preferred contact info
<table>
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<td>Tacoma CC</td>
<td>! Overdue</td>
<td>Initiated</td>
</tr>
<tr>
<td>Standard 2018-2019</td>
<td>Tacoma CC</td>
<td>! Overdue</td>
<td>Initiated</td>
</tr>
</tbody>
</table>
Step 1 of 7: Introduction

Verify Your Personal Information

Please complete each section of this task to verify your personal information. Select Save if you have updated your details or select Confirm if the details we have for you are correct. Select Next to proceed to the following section.

Once you have reached the Complete Task page, please check that all sections are marked as complete before selecting Submit to complete the task. You can select Exit at any stage to leave the task if you wish to continue at a later date.

Some personal details may require additional documentation to update. Please contact your college if you are unable to update your details or have any questions.
### Step 2 of 7: Personal Details

**Date of Birth**: 12/05/1991  
**Gender**: Female  
**Social Security Number**: *****2161

<table>
<thead>
<tr>
<th>Name</th>
<th>Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lady Bird Johnson</td>
<td>Primary</td>
</tr>
<tr>
<td>Ms ExampleAH Student</td>
<td>Preferred</td>
</tr>
<tr>
<td>Task</td>
<td>Institution</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>-----------------</td>
</tr>
<tr>
<td>Personal Information Verification</td>
<td>Clark College</td>
</tr>
<tr>
<td>Institutional Form</td>
<td>Tacoma CC</td>
</tr>
<tr>
<td>Standard 2018-2019</td>
<td>Tacoma CC</td>
</tr>
</tbody>
</table>
Step 7 of 7: Complete Task

Personal Information Verified

Thank you for completing all steps in this task. Once you have checked that each section is marked as complete, select Submit to finalize the task and then select Exit.
AAR STUDENT EXCEPTIONS

• Student Exceptions are used to record approved substitutions in student’s AARs.

• Student Exceptions are placed on the student’s AAR manually on a case-by-case basis.

• Only limited staff members should have access to apply Student Exceptions.

• Student Exceptions can be granted before or after the student has earned credit in the course(s).
AAR STUDENT EXCEPTIONS - CONTINUED

Student Exceptions may be used to:

• Swap a course(s) with an approved substitution(s)
• Apply a course to a requirement not ordinarily satisfied by that course
  • Example: A student petitions to have her transfer business math course approved to satisfy the quantitative reasoning requirement.
COURSE PLACEMENT

• Course placement may be added to the student’s AAR.

• Course placement AAR rules may be based on:
  • Individual test scores
  • A combination of test scores
  • Classes current in-progress or completed
    • GPA minimums can be applied to rules
  • Transfer or test credit awarded
• Student Test Results (scores) are global, i.e., if another college loads ACUPLACER scores, those scores will automatically satisfy pre-requisite rules at your college.

• Test Results may be set to expire in pre-requisite rules.

• Although Test Results are global, colleges will not have access to each other’s placement rules.
COURSE PLACEMENT GUIDE

• AAR Quick Reference Guide
### Test Credits

<table>
<thead>
<tr>
<th>Transfer Term</th>
<th>Test ID</th>
<th>Test Component</th>
<th>Score</th>
<th>Status</th>
<th>Equivalent Course</th>
<th>Units</th>
<th>Grade</th>
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</thead>
<tbody>
<tr>
<td>FALL 2015</td>
<td>AP</td>
<td>CH</td>
<td>3.00</td>
<td>Posted</td>
<td>CHEM&amp; 121</td>
<td>5.00</td>
<td>S</td>
</tr>
<tr>
<td>FALL 2015</td>
<td>AP</td>
<td>ENGC</td>
<td>3.00</td>
<td>Posted</td>
<td>ENGL&amp; 101</td>
<td>5.00</td>
<td>S</td>
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<tr>
<td>FALL 2015</td>
<td>AP</td>
<td>STAT</td>
<td>5.00</td>
<td>Posted</td>
<td>MATH&amp; 146</td>
<td>5.00</td>
<td>S</td>
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</tbody>
</table>

### Other Credits

<table>
<thead>
<tr>
<th>Transfer Term</th>
<th>Description</th>
<th>Status</th>
<th>Equivalent Course</th>
<th>Units</th>
<th>Grade</th>
</tr>
</thead>
<tbody>
<tr>
<td>WINTER 2017</td>
<td>PLA-Joint Services Transcript</td>
<td>Posted</td>
<td>CS 142</td>
<td>5.00</td>
<td>A</td>
</tr>
</tbody>
</table>
FINANCIAL AID SELF SERVICE

• View Financial Aid allows students to see their offered, accepted, and disbursed Financial Aid Awards.

• Financial Aid Awards include federal and state grants, federal loans, and college and external grants and scholarships.
STUDENT FINANCIALS SELF SERVICE

• Financial Account tile allows students to view detailed charges due, make a credit card payment, and sign up for payment plans.
FINANCIAL AID SELF SERVICE DEMO
GRADUATION

• College has option to allow graduation applications via student self-service
• Student must be coded in degree in order to apply for graduation via self-service
• Can allow all students to apply, or enable application by flagging students who are eligible to apply
• College determines dates each term is available for application submission and instructions text
GRADUATION – CONT.

• Application fees can be applied to student’s account once application is received

• Degree Boost type queries to identify students who are nearing/have completed degree requirements, but have not applied for graduation

• Batch functionality to identify and award students
  • Can be used without a formal app for auto-conferral
The ctcLink Student Homepage is shown, with a focus on the 'Academic Progress' section. This section highlights the user's academic progress with icons indicating completed and in-progress assignments, as well as visual representations of course progress.
Apply for Graduation

Select Program and Degree

Select an Academic Program

<table>
<thead>
<tr>
<th>Academic Program</th>
<th>Degree</th>
<th>Major</th>
<th>Academic Transfer AA DTA</th>
</tr>
</thead>
</table>

Academic Program | Academic |
Degree | Associate in Arts |
Major | Business DTA/HRP |
Select Graduation Term

Apply for Graduation

Select Graduation Term

The academic program listed here was selected to apply for graduation. If this is not correct, return to the previous page and select a different academic program.

Select a valid term to apply for graduation by selecting a value from the dropdown. Only terms in which you are able to apply for graduation will be displayed.

<table>
<thead>
<tr>
<th>Program</th>
<th>Academic</th>
<th>Career</th>
<th>Academic Career</th>
</tr>
</thead>
<tbody>
<tr>
<td>Degree</td>
<td>Associate in Arts</td>
<td>Major</td>
<td>Business DTA/MRP</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Select the appropriate term from the drop down. If no values are found, you are not eligible to apply for graduation at this time.

Expected Graduation Term: FALL 2019

Graduation Instructions

Students must apply for graduation to be awarded a degree or certificate. Students are encouraged to apply one term before they plan to complete all of their requirements. Once submitted, your application will be reviewed by the Credential Evaluations team. Please track the status of your application in Student Center by selecting the My Academics link.

[Select Different Program] [Continue]
Apply for Graduation

Verify Graduation Data

Verify that all data is correct.

If the academic program/degree is not correct, select the Select Different Program button to select a different value.
If the term is not correct, select the Select Different Term button to select a different value.
If everything is correct, select the Submit Application button to continue the process.

---

<table>
<thead>
<tr>
<th>Program</th>
<th>Academic</th>
<th>Career</th>
<th>Academic Career</th>
</tr>
</thead>
<tbody>
<tr>
<td>Degree</td>
<td>Associate in Arts</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Major</td>
<td>Business DTA/MP</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Expected Graduation Term: FALL 2019

Graduation Instructions

Students must apply for graduation to be awarded a degree or certificate. Students are encouraged to apply one term before they plan to complete all of their requirements. Once submitted, your application will be reviewed by the Credential Evaluations team. Please track the status of your application in Student Center by selecting the My Academics link.

Select Different Program
Submit Application
Select Different Term
Apply for Graduation

Submit Confirmation

✓ You have successfully applied for graduation.
ADVISOR HOMEPAGE

• My Advisees
  • View your advisees
  • Send notification messages
  • Create/view advising notes

• Advising Notes
  • Filter and view advising notes
  • View notes for other students

• Advisor Center
  • One-stop shop to view advisees or other students’ records
  • Enrollment & course history
  • Transfer credit
  • Shopping Cart
  • Holds
  • Student Groups
  • Planner
<table>
<thead>
<tr>
<th>Notify</th>
<th>Name / ID</th>
<th>Committee</th>
<th>Email</th>
<th>Advising Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Betty Locherty</td>
<td>101005590</td>
<td><a href="mailto:bettyloechert@qctclink.local">bettyloechert@qctclink.local</a></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Roberta Johanson</td>
<td>101005596</td>
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</tr>
<tr>
<td></td>
<td>Trevor Black</td>
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<tr>
<td></td>
<td>Kyoko Mizumi</td>
<td>101006954</td>
<td>kioko@ctclocal</td>
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<tr>
<td></td>
<td>Karen McMillan</td>
<td>101008766</td>
<td><a href="mailto:cs_button_2@qctclink.local">cs_button_2@qctclink.local</a></td>
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<tr>
<td></td>
<td>Shania Norton</td>
<td>201033048</td>
<td><a href="mailto:shanina@qctclink.local">shanina@qctclink.local</a></td>
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</tr>
<tr>
<td>Name</td>
<td>Email</td>
<td>Advising Notes</td>
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</tr>
<tr>
<td>-----------------------</td>
<td>----------------------------</td>
<td>----------------</td>
<td></td>
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<tr>
<td>Betty Locherty</td>
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<tr>
<td>Roberta Johanson</td>
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<td></td>
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<tr>
<td>Trevor Black</td>
<td><a href="mailto:tb1985@qctclink.local">tb1985@qctclink.local</a></td>
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<tr>
<td>Brock McMillan</td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Shania Norton</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Options:
- Notify Selected Advisees
- Notify All Advisees
- My Advising Notes
Send Notification

Type e-mail addresses in the To, CC or BCC fields using a comma as a separator.

Notification from Advisor Name

From: cs_cctcl_1@cctclink.local

To: cs_cctcl_1@cctclink.local

CC:

BCC: bettylochery@cctclink.local, johanson58@gmail.com, tb1985@cctclink.local, kioko@cctclink.local, cs_cctcl_2@cctclink.local

Subject: <From the desk of Advisor Name>

Message Text: Example message here.
ADVISING NOTES

• Used to track student interactions and important notes
  • Although referred to as “Advising” notes, this functionality can be used across campus departments

• Includes ability to attach documents

• Can be made visible to student, with responses and document upload
ADVISING NOTES – CONT.

• Can be assigned to other staff members and add action items w/due dates

• Ability to notify students and other staff regarding note
  • Includes link to note, category, subcategory, status, and additional message
Add a New Note Item

Example note here

Apply
ADVISER NOTES PAGE

Betty Locherty
101005590

Advising Notes
Enter an advising note and select Submit when done.

Create Advising Note

- Institution: Tacoma CC
- Category: Advising Notes
- Subcategory: Educational Plan
- Subject: Example Subject

Status: Open
Advisee Access: No
Assigned To: 101005779
Advisor Name
Contact Type:

Note Items
1 row

<table>
<thead>
<tr>
<th>Note Item</th>
<th>Entered By</th>
<th>Entered On</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Advisor Name</td>
<td>08/19/2019</td>
<td>Example note here.</td>
</tr>
</tbody>
</table>

Action Items
No data exists.
Add Action Item

Attachments
No attachments.
Add Action Item

- Action Item: 1
- Entered On: 08/19/2019
- Description: Action item here.
- Action Item Status: Incomplete
- Due Date: 09/15/2019

Apply
### Advising Notes

**Betty Lochert**
101005590

**Advising Notes**

<table>
<thead>
<tr>
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**Action Items**

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<td>Action item here.</td>
<td>Incomplete</td>
<td>09/15/2019</td>
</tr>
</tbody>
</table>
EMAIL SCREEN SHOT FROM ADVISOR

To: k@t.edu

Wed, 1 May 2019 11:43:05 -0700

Approved for 18 credits, Fall 2019

To: cs_ctcl_1@qctclink.local

Advising Note: Approved for 18 credits, Fall 2019

Category: Advising Sub Category: Credit Overload Request
Note Status: Open

Additional Message: Enrollment Services will update your enrollment limit in 3 business days.
EARLY ALERT

- Customization that allows instructors, advisors, and staff to raise concern regarding student performance
- Student can be notified of alert entry
- Workflow allows two levels of staff reviewers
  - Entry and review
  - Mark worked, approve, and close
EARLY ALERT - CONTINUED

• College specifies dates each term for Early Alerts to be entered

• Instructors enter alert via Faculty Center (self-service) – grade roster must be open

• Advisors enter alert via Advisor Center (self-service)

• After alerts are submitted, a workflow routes the alert to designated staff member(s)
  • Staff members can view the alert details and mark it as complete

• Communications can be sent out based on both the early alert and the workflow
EARLY ALERT – CONTINUED

• Early Alert Categories are:
  • Notes on Class/Attendance
  • Notes on Low Grades
  • Notes on Incomplete Assignment
  • Poor Class Participation
  • Known/Unknown Ext Factors
  • Notes on Other
EARLY ALERT - DEMO

• Advisor Center