



Operationalizing Transfer Credit through Systems Development

ONTransfer.ca Day

February 25, 2019

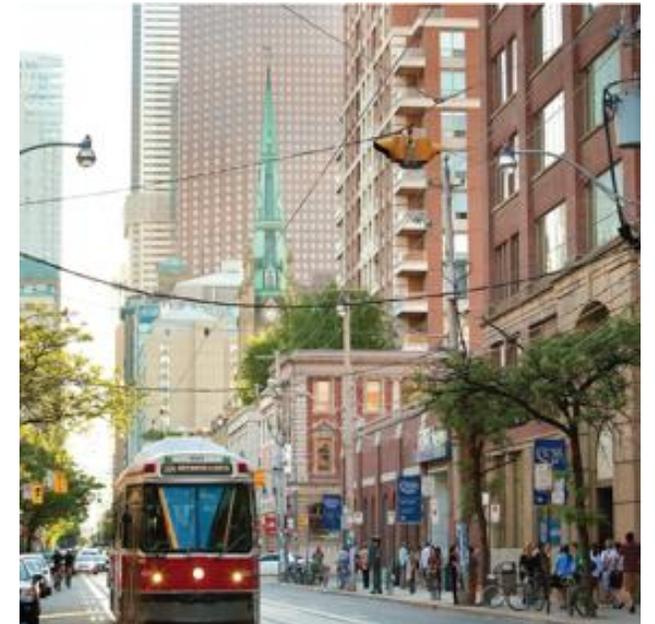
Presented by:

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About George Brown College

- Large urban college
- Located in downtown **Toronto, Ontario**
- **Three** main campuses and several satellite campuses
- Approximately **28,000** full-time students and **65,000** part-time students
- **183** full-time programs, including, Degrees, Diplomas, Certificates and Apprenticeships



Agenda

- 1** Introduction
 - 2** Project Objective and Goals, Glossary of Terms
 - 3** The Transfer Credit Process Prior to Automation
 - 4** The Project Team and Design Principles
 - 5** Project Deliverables and Demonstrations
 - 6** Successes and Challenges
 - 7** Still to Come
 - 8** Summary/Questions & Answers
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Introduction

Introduction

In this session:

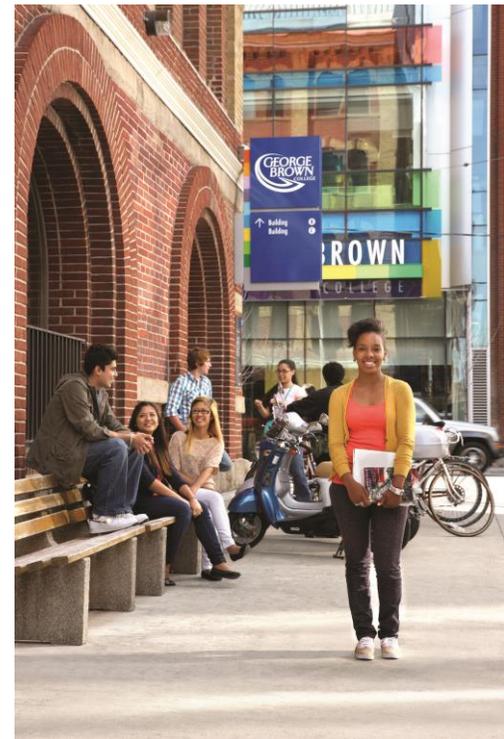
- We will explore how our online Transfer Credit Application as well as the administrative forms, reports and communication tools are used to support the automation and centralization of the transfer credit processes
- Demonstrate the student and evaluator application process

Note that operationalizing our Transfer Credit systems is an ongoing journey, and we continue to provide enhancements, training & support.

About George Brown College Cont'd

Each year, we:

- Receive **~90,000** applications (domestic & international) for full-time programs
- Receive **~20,000** transcripts (domestic applicants)
- Process **~6,700** transfer credits
- Process **~5,200** transfer credit applications
- Admit **~2,600** transfer students



Roles and Responsibilities

Academic Divisions:

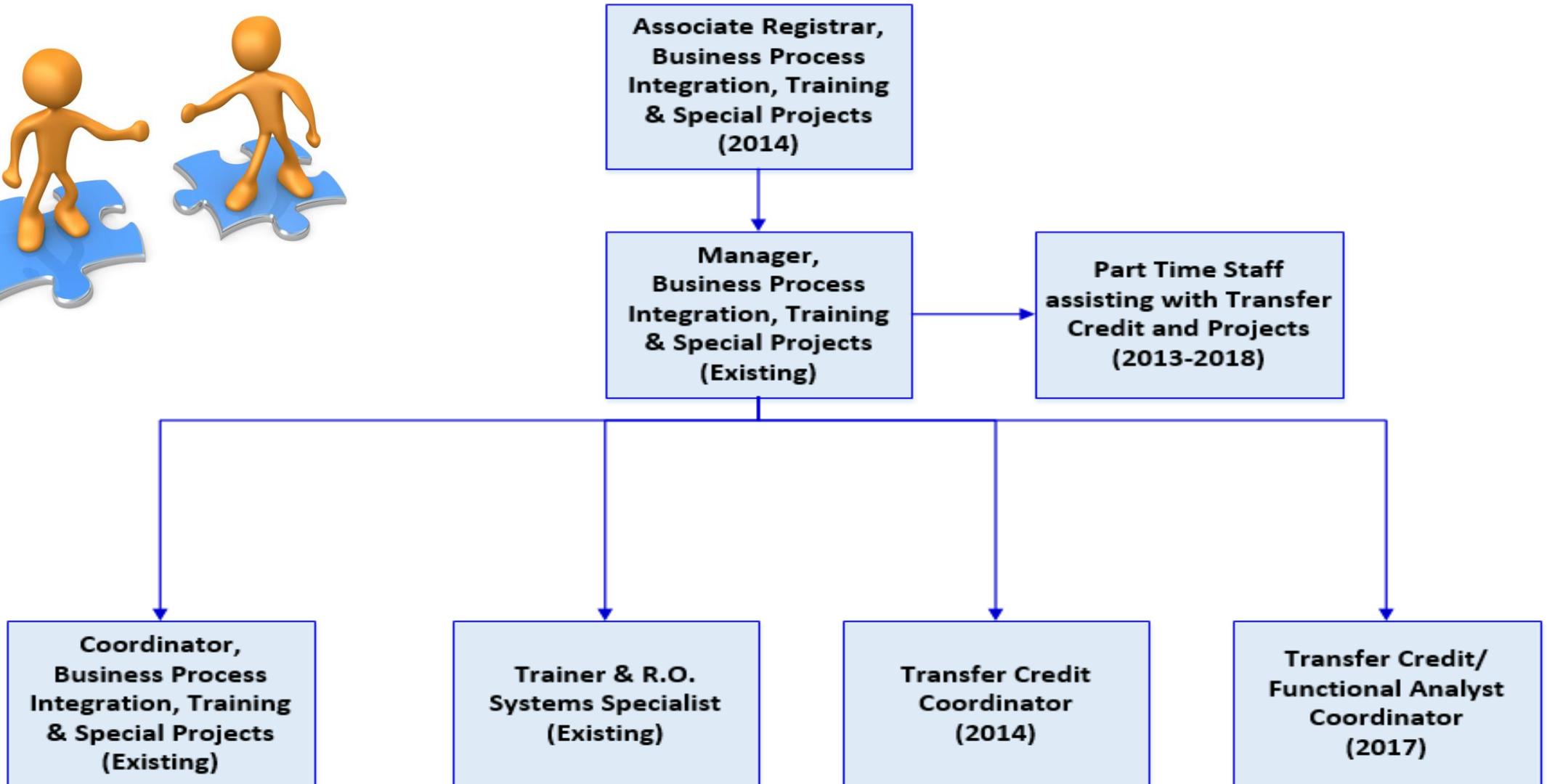
- Make all decisions regarding the granting of transfer credits using the new online functionality
- Negotiate all articulation agreements with other institutions

Office of the Registrar:

- Build and maintain the equivalencies for Transfer Credit using the Transfer Articulation module in Banner
- Support all the automated Transfer Credit systems and processes
- Review and enter a decision on Transfer Credit applications based on equivalencies



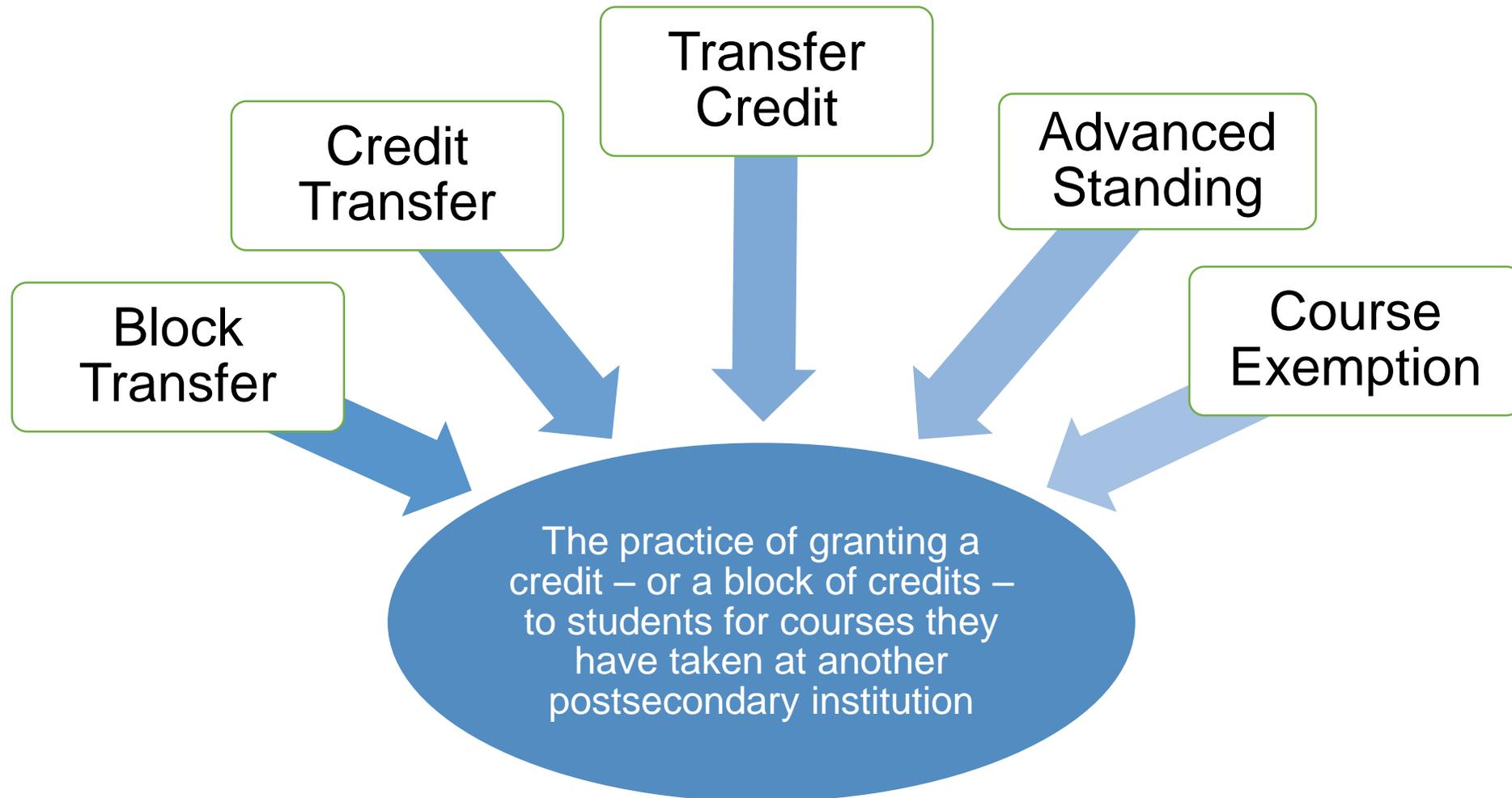
Organizational Structure





Glossary of Terms and Project Objectives & Goals

What is Transfer Credit at George Brown?



Glossary of Terms

- **Transfer Credits:** course-to-course transfers
 - Assigned an *EX* grade on the student record
 - Does not effect the GPA calculation
- **Advanced Standing:** block-to-block transfers that are used when students apply to an upper semester
 - Assigned an *AS* grade on the student record
 - Does not effect the GPA calculation
- **Banner OCAS Admissions Module:** Ellucian's Ontario-specific Admissions Module
 - Integrates with OCAS
- **OCAS:** Ontario Colleges Application Services
- **XML Transcript:** Electronic Transcript, data is transferred between Colleges and OCAS

Our Goals

- **Help students**, applicants and prospects by providing a vehicle to determine what previous learning credits could be applied to their program of choice
- **Streamline** the transfer credit application and approval process
- **Create operational efficiencies** in the recording of transfer credits on student records
- **Integrate** with the ONTransfer Course Equivalency system
- **Create accountability** in the Transfer Credit Application, Evaluation and Approval process

Project Objective

The objective of the **Transfer Credit Project** was to automate our transfer credit processes to:

- support enrolment targets
- provide an enhanced service for applicants, students, and faculty
- support student success at George Brown College





The Transfer Credit Process Prior to Automation

Our Starting Point



PAPER, PAPER EVERYWHERE!

George Brown College had a non-centralized, inefficient, paper-based transfer credit process

- Each term, students completed **paper applications** for transfer credit
- The paper applications were submitted to the corresponding Academic Department, along with a **course outline** and **official transcript**
- Students often had to complete **multiple applications** and go to **multiple departments** (e.g. English, General Education, etc.)

Our Starting Point (cont'd)

- In many cases, the Admissions Office already had an official transcript on file for the student, however this transcript was **not available** to the Academic Departments.
- Therefore, the student had to either:
 - (a) Obtain **another** official transcript, or
 - (b) Contact the Admissions Office to forward a copy of their official transcript to the Academic Department
- There was **no central database**, which meant that:
 - Students were **not aware of potential transfer credits** – we did not publicize this information anywhere
 - Evaluators were reviewing the same course combination **multiple times** since no rules were established

Our Starting Point (cont'd)

- Staff in the Academic Departments **manually entered** the approved and denied decisions in different Banner forms
- The paper applications were then **filed** in filing cabinets
- **No notifications** were sent to students
- Students were advised to register for any courses where they were applying for transfer credit and then **keep checking their timetables for a decision**
- The system had very few checks and balances and was therefore **error-prone**



The Project Team and Design Principles



Early Engagement

- Preliminary in-department assessment of requirements
- Research other institutions in Ontario and abroad
- Promotion and education about business needs & changes
- Build the College's readiness to adopt the change across multiple dimensions, such as people, process, and technology



Creating Project Teams and the Implementation Plan

- Set up a **Steering Team**
- Set up a **Working Team** made up of individuals from the:
 - Academic Departments,
 - I.T.S. Department, and
 - Registrar's Office
- **Established roles and responsibilities** for all team members
- **Mapped out the:**
 - (A) current paper-based process
 - (B) desired process at a high level
- Created a **training plan** and a **communications plan**

Created Supporting Roles

2013: Part-time Transfer Credit Project Assistant

2013: Created New Role – Transfer Credit Coordinator

2014: New Associate Registrar Role

2014: Approved and Hired for new positions

2016: Approved for permanent Transfer Credit Coordinator position

2017: Approved & hired for New Transfer Credit/ Functional Analyst Coordinator position

Our Project Team

From the Registrar's Office

- **2 Functional Project Leads**
(part-time)
- **1 Project Assistant** *(part-time)*
- **1 Transfer Credit Coordinator**
(full-time)

From the I.T.S. Department

- **1 Project Coordinator** *(part-time)*
- **1 Systems Analyst**
- **1 Developer**
- **1 Quality Assurance Analyst**
(part-time)

Our Project Timeline

Started in
2013

Completed in Phases
(i.e. development was not continuous)

Will finish
by 2020

Continuous
Support

Process Flow – High Level



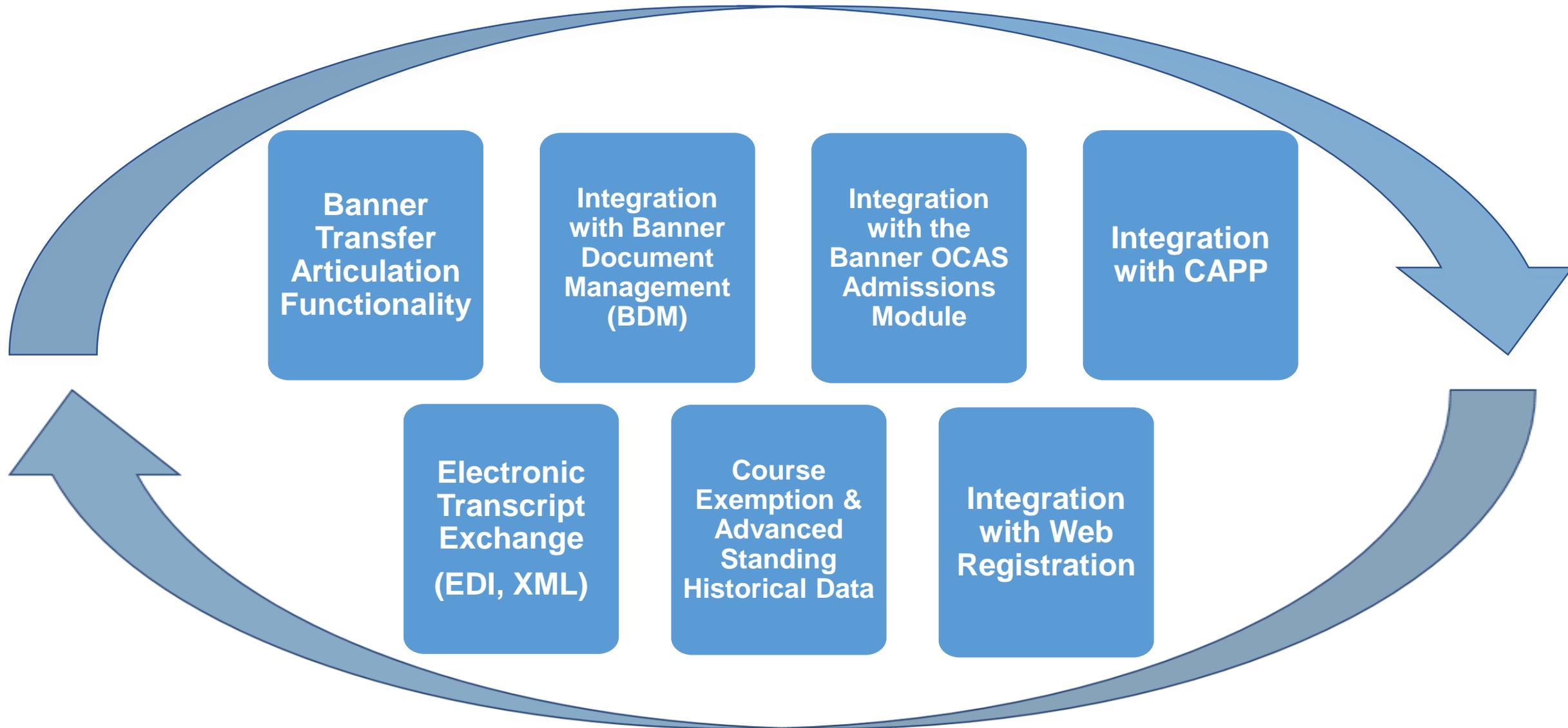
Highlevel TC
Processes

Design Principles

- Leverage existing transcripts (XML & Official Paper) on record to support transfer credit rules in 2013
- Leverage existing transfer credit (course exemption) and advanced standing data to build course equivalencies
- Create course equivalencies applicable to **all programs**
- **Automatic** approval of transfer credit requests and apply against the student record if:
 - a) Course equivalency rule exists in the system, and
 - b) Minimum grade is met* according to the student's official XML or Paper Transcript

* the required minimum grade for the course for promotion within a program
- The Academic Divisions **make decisions** on all other course equivalency requests
- Approved course equivalencies will be added to our database and **synchronized** with the ONTransfer Course Equivalency system

Key Components of the Transfer Credit Online Application





Project Deliverables and Demonstrations

Project Deliverables

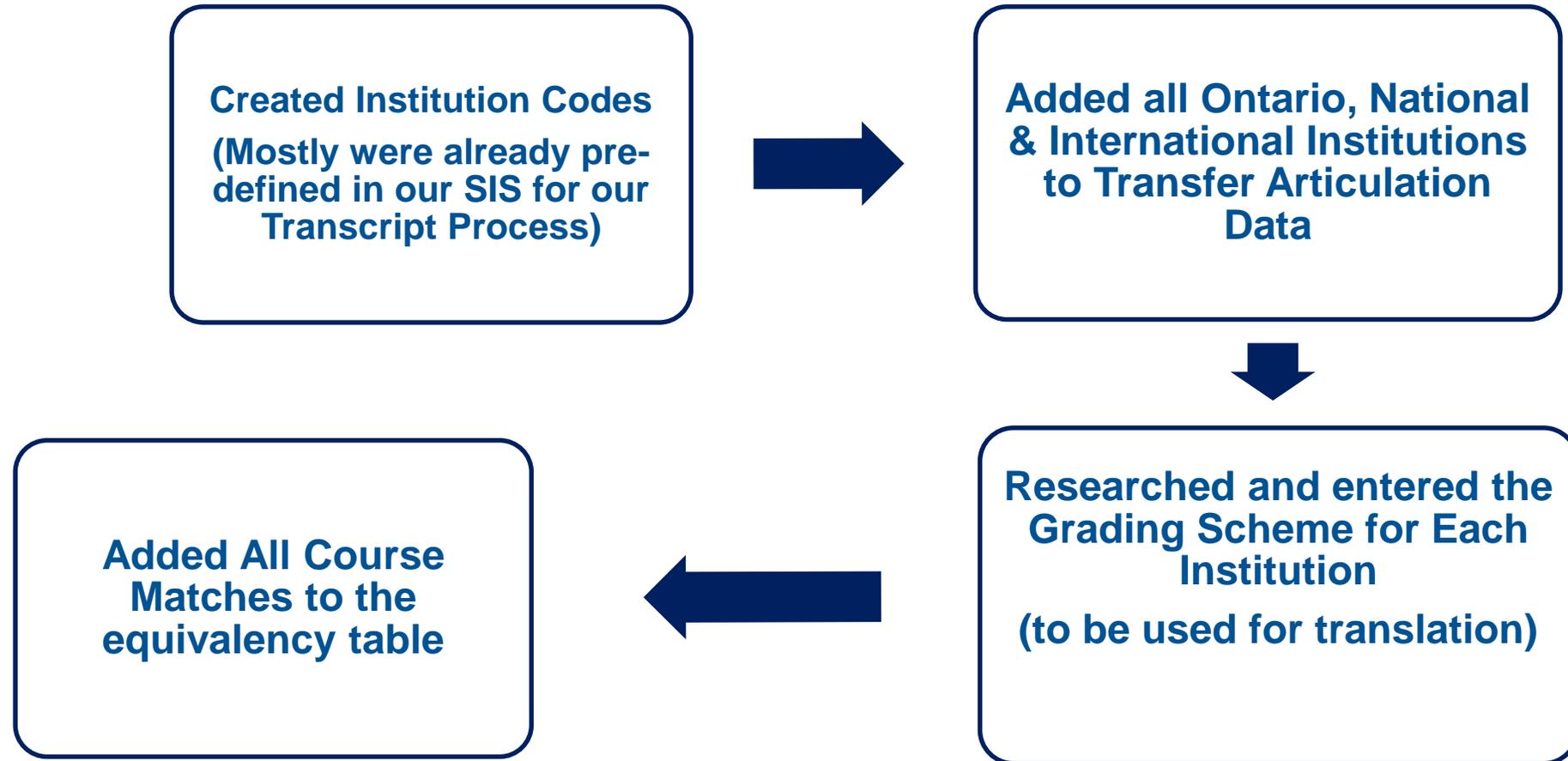
We needed to identify the current equivalency rules

- **This data was stored in filing cabinets within the Academic Offices**
- **So we went through all the filing cabinets and entered the data in excel spreadsheets**
- **The spreadsheets were then reviewed by Faculty to confirm rule creation**

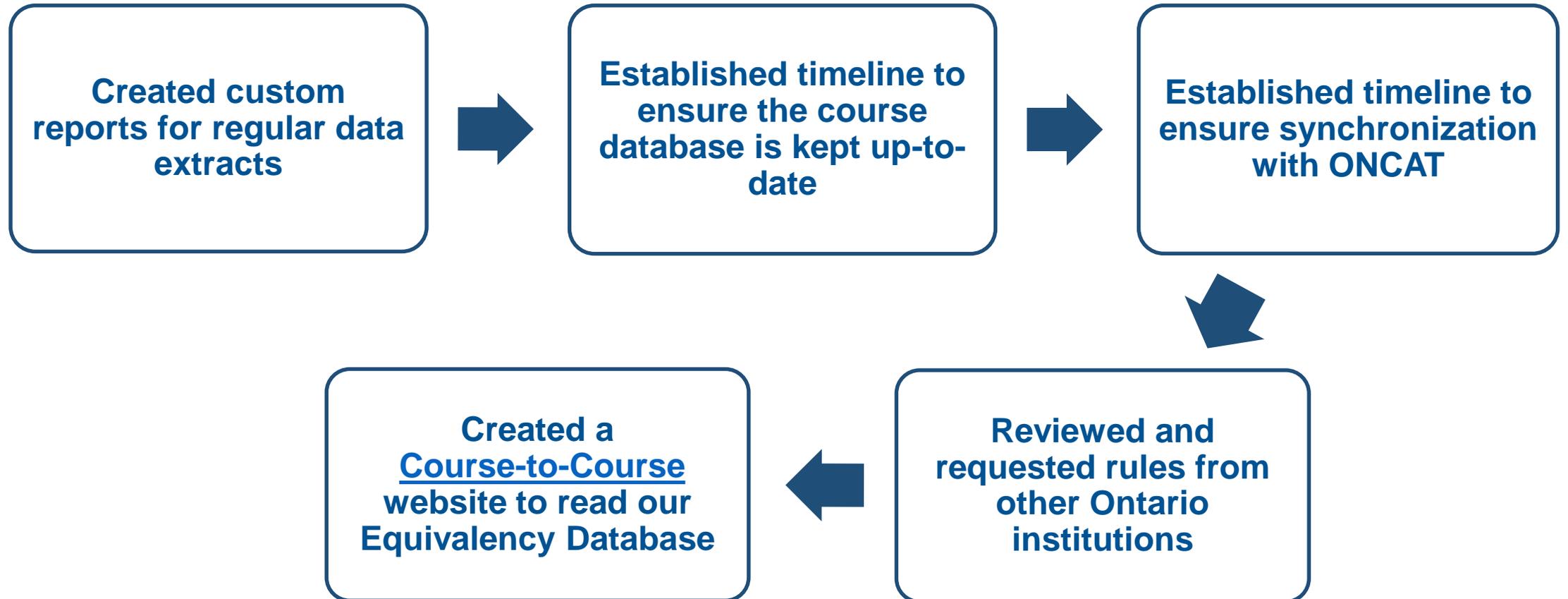


Project Deliverables (cont'd)

Building the Equivalency Rules in our SIS (Banner)

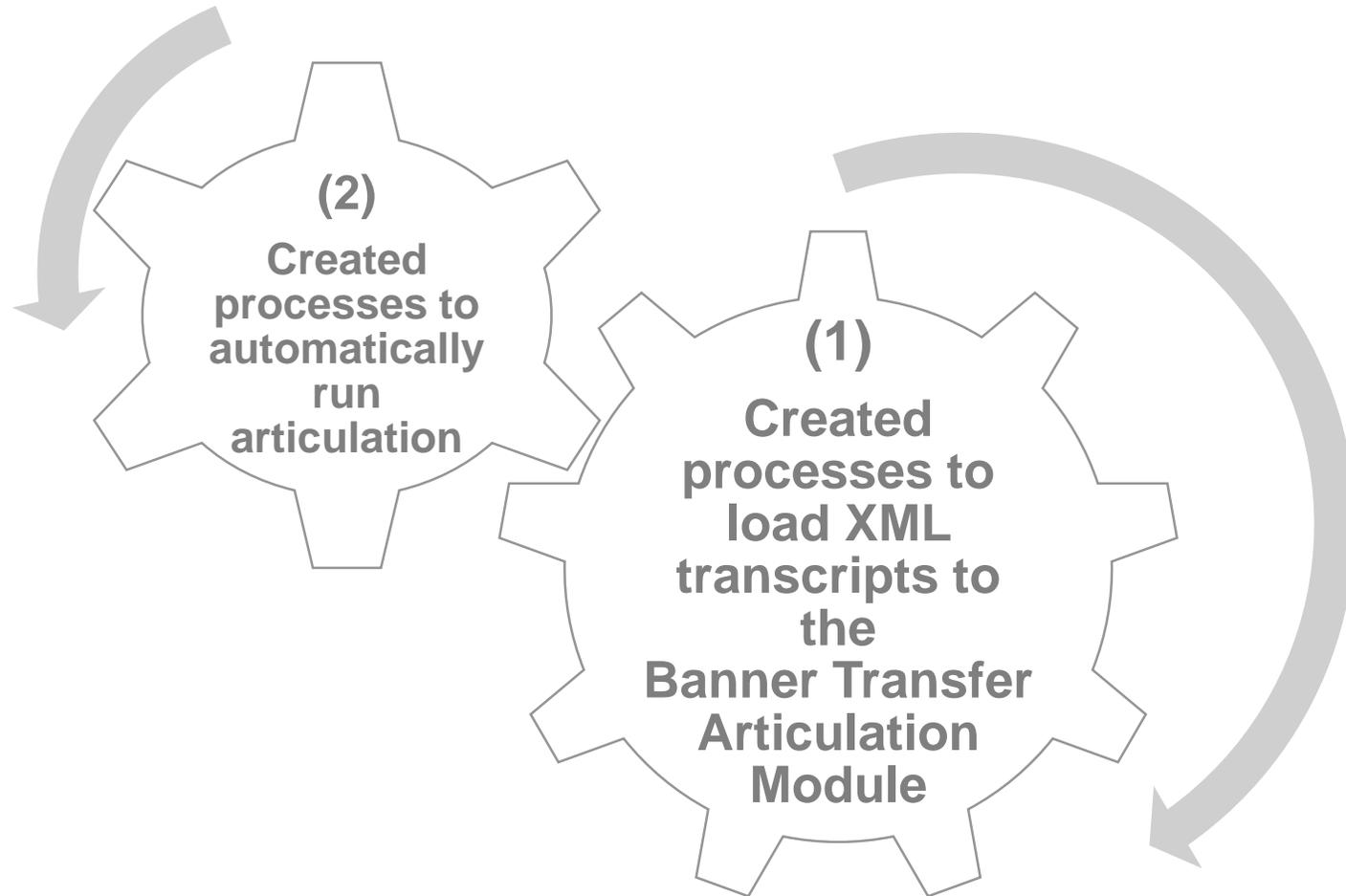


Project Deliverables (cont'd)



Project Deliverables (cont'd)

Automated Major Processes



Project Deliverables (cont'd)

Increase Transfer Credit Awareness

Created a variable to insert potential transfer credits in the offer letters



Created a new dynamic web page to display admissions status and possible transfer credits to applicants (DEMO)

Project Deliverables (cont'd)

SAMPLE: Transfer Credit Information in the Offer Letter

Eligibility for Transfer Credit

Dear Sara,

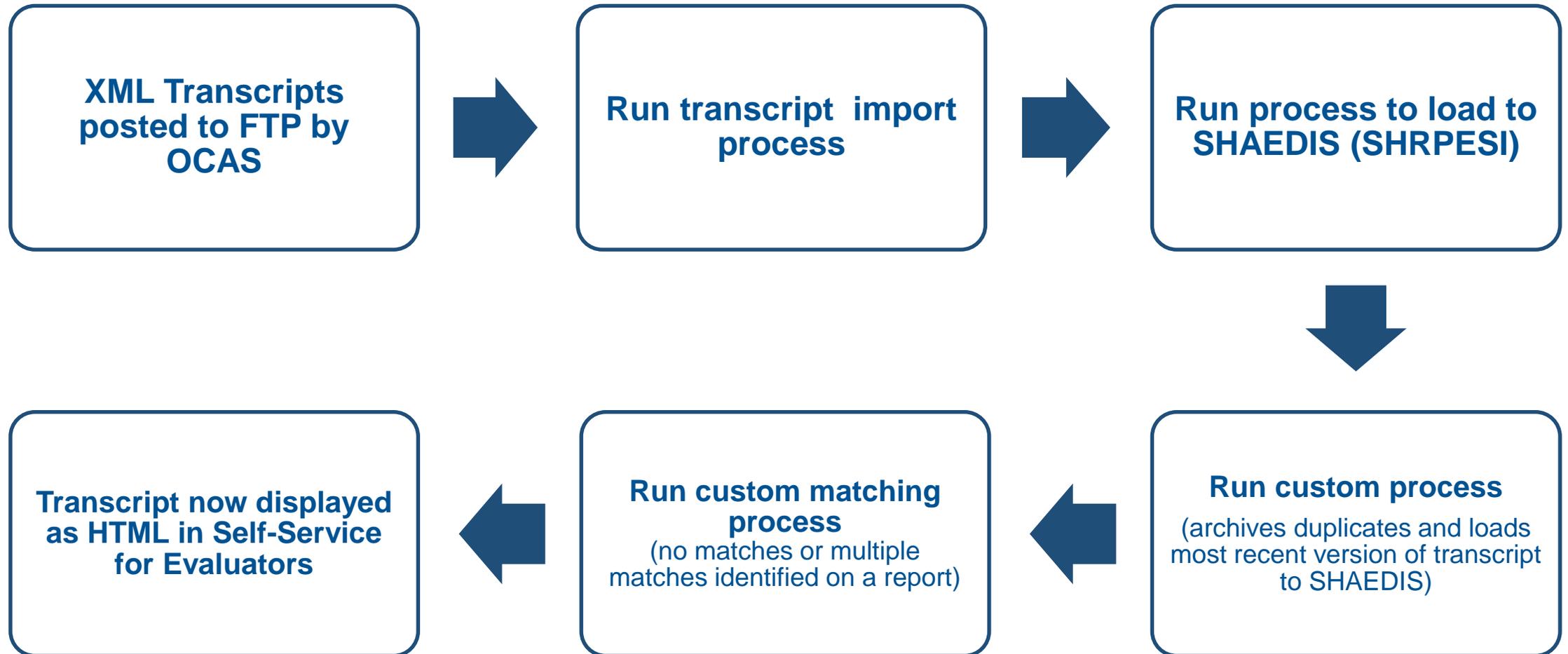
Based on the post-secondary transcript(s) we have received from OCAS, we are pleased to present you with possible transfer credits from the following course combinations. These courses may be related to one or more of the offers stated in your offer letter. Please read this entire letter for important information on the transfer credit process.

Source Institution	Course	Equivalency at George Brown College
Seneca College	EAC 150	COMM 1007 COLLEGE ENGLISH

Please be advised that in order to be granted transfer credit(s) for the course(s) listed above, you must first accept your offer of admission by the deadline date. In addition, the course(s) must be offered in the program/semester in which you are registering. Details on how to accept your offer can be found in the enclosed offer letter. At a later date – during the registration process – you will be prompted to either accept the exemption as offered or you may choose to register in the course(s).

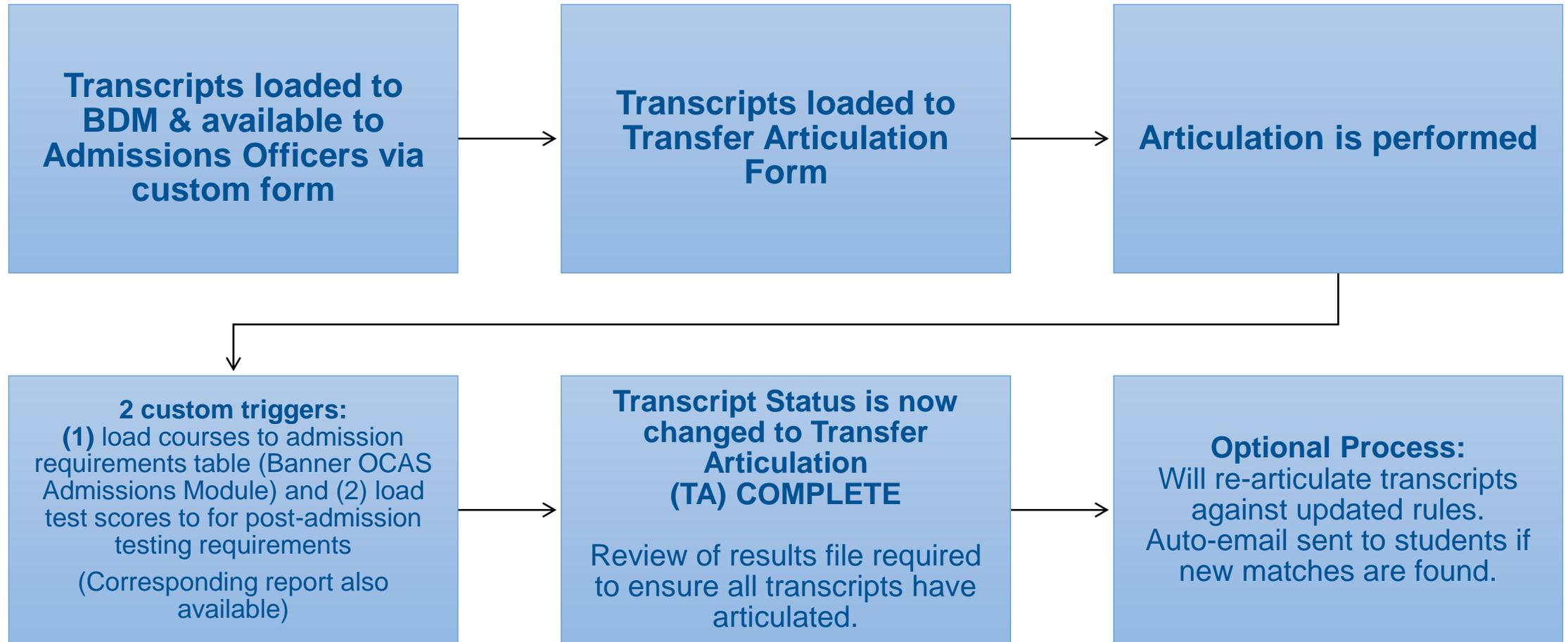
Project Deliverables (cont'd)

Automating the Articulation Process – Key to Mass Articulating



Project Deliverables (cont'd)

Created a series of custom jobs to process en masse:



Project Deliverables (cont'd)

Articulation Agreements

Created custom form in Banner to store articulation agreements

This allows us to stay synchronized with ONCAT.



Created the Transfer Agreements & Opportunities website to display articulation agreements stored in custom form our SIS

Project Deliverables (cont'd)

Created Efficiencies in the Admissions Office

Created a process to automatically load the XML Transcripts to BDM (Banner Document Management)

- A custom mass print job was also created to support this process

Created a trigger to transfer the XML courses to the Banner OCAS Admissions Module

- A custom Crosswalk Form in Banner was created (SWAOCXW) to map external courses to our admission requirements

Create a custom INB Form to display all transcripts from BDM to the Admissions Officers



Project Deliverables (cont'd)



Created the Online Application for Transfer Credit – **Student Interface**



Created the Approve/Deny Transfer Credit Online Functionality – **Evaluator Interface**



Changed web registration by creating a new page – **Accept/Refuse Transfer Credit**

Project Deliverables (cont'd)

- Built a custom database to store General Education Requirements by program, and feed to the public website
 - This database was then utilized for transfer credit eligibility, to control min/max requirements, breadth requirement by program, the mandated and excluded electives.

Centre for Preparatory and Liberal Studies		
School of Work and College Preparation		
A103 - Pre-Community Services		
Elective Requirements	Mandated Courses	Course Exclusions
Choose 1 General Education Elective Courses from the following categories: <ul style="list-style-type: none">• GHUM - Arts and Humanities MIN: 0 MAX: 1• GSSC - Social Sciences MIN: 0 MAX: 1• GSCI - Science and Technology MIN: 0 MAX: 1	You must take the following course(s): GHUM 1025 SPEAKING WITH CONFIDENCE	You may not take the following course(s) as electives: GSSC 1058 INTRODUCTION TO PSYCHOLOGY GHUM 1025 SPEAKING WITH CONFIDENCE

Applications

Total number of applications received for Fall 2018:	2177*	Total number of applications received for Fall 2017:	2582
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* Decrease of almost 16% from previous year.

Impact of change to application set-up*:	201701	201801	Results
Denied As of day 10 of cycle	920 (36% of total applications)	527 (24% of total applications)	66% Decrease in denied applications
Approve Alternate As of day 10 of cycle	496 (19% of total applications)	15 (.01% of total applications)	Nearly 100% of applications are now approved as submitted or edited by evaluator.

As a result of the Elective Requirements Database Set-up & functionality, students are applying for more appropriate course combinations.

This has reduced the amount of work in the Transfer Credit & Academic Offices significantly.

Demonstration

Online Application for
Transfer Credit –
Student Interface

Demonstration

**Approve/Deny Transfer
Credit Online –
Evaluator Interface**

Project Deliverables (cont'd)

You have selected to continue in program: **H100 in the term of Winter 2016**

There are courses offered this term for which you are eligible for a transfer credit.

- You have either applied for transfer credit and been approved, or
- We have determined your eligibility for transfer credit(s) based on your incoming transcripts.

You are now required to choose one of the following options:

- **Accept/Keep Exemption** - If you accept the transfer credit, you will be exempted from taking this course at George Brown College. Instead, a grade of *EX* will be displayed for the course on your academic record.
- **Register for Course** - If you decline the transfer credit, you must register in this course at George Brown.

IMPORTANT NOTES:

1. After submitting your transfer credit decisions, please continue to the registration page.
2. If you have accepted a generic exemption for your General Education and/or Liberal Studies Elective, please drop your elective course from your schedule.
3. You must then submit (or re-submit) your registration and agree to our important college policies in order for your exemptions to be processed.
4. A summary of your schedule will then be displayed, where you will be able to confirm that your exemptions have been processed -- i.e. the status for your course will be listed as "Exemption."

You have been approved for the following transfer credits. Please select your decision for each course.

CRN	Subject Area	Course Number	Course Title	Accept/Keep Exemption	Register for Course
	GSCI	1111	GENERAL EDUCATION - SCIENCE	<input checked="" type="radio"/> If you have already registered for an Elective, you may choose to drop the course on the next page.	<input type="radio"/>
	GSSC	1111	GENERAL EDUCATION- SOCIAL SCI.	<input checked="" type="radio"/> If you have already registered for an Elective, you may choose to drop the course on the next page.	<input type="radio"/>
	GSSC	3333	GENERAL EDUCATION-SOCIAL SCIEN	<input checked="" type="radio"/> If you have already registered for an Elective, you may choose to drop the course on the next page.	<input type="radio"/>

Prior Exemptions					
Term Granted	CRN	Subject Area	Course Number	Course Title	Grade Ex=Course Exemption AS=Advance Standing
201501	10668	HOSF	1146	EMRG FIRST AID/HEARTSAVER CPR	EX
201501	10973	HOST	1068	SMART SERVE	EX
201501	10665	HOSF	1145	SANITATION	EX

Continue

**Web Registration –
Accept/Refuse
Transfer Credit**



Successes and Challenges

Achievements (In Stages)

Initial Stages

- **New Positions Supported**
- **Requirement gathering sessions**
- **Collaboration between multiple departments & positions**
- **Documentation**
- **Training, Testing & Communication Plans**

Implementation

- **Automation/Centralization**
- **Academic Departments Support**
- **Customized Training Sessions**
- **Fine-tuning of system functionalities**
- **Online Resources**
 - **Transfer Guide**
 - **C2C & B2B Database**

Adoption

- **Frontline Student support**
 - **Training**
 - **Documentation**
 - **Tools**
- **Continue to support enhancement requests**
- **Enhance Email & Social Media Campaigns**

Things to Consider

Continuous Improvement

- Rate of Change
- Supporting System Improvements (i.e. XML transcript changes)

Reporting & Validation

- Course Set-up (i.e. electives, attributes, rules)
- Building rules in your SIS
- Capturing detailed data elements from electronic sources

Knowledge Transfer

- Online Training
- Documentation





Still to Come

Still to Come

- **Assisted Application for Transfer Credit**

- Create a new interface to allow staff to create & approve applications for Transfer Credit

- **Automate the Advanced Standing Process – *New Workflow***

Create a new web form allowing Admissions Officers to forward applications for Advanced Standing to evaluators

- Evaluators will then be able to:
 - View transcripts online & compare requirements against CAPP
 - View articulation agreements online
 - Communicate with applicants via built-in tool



Still to Come – Automating the Advanced Standing Process

Applicant Name:		Term Applied to:	
Applicant Banner I.D		Program Applied to:	
Applicant OCAS I.D		Semester Applied to:	

Forwarding Admissions Officer Name:	
Evaluator's Name:	
Date Forwarded:	

Compose Email Message to Evaluator

Transcript Information:
 Will be pre-populated if an XML Transcript was submitted.
 If a non XML Transcript was submitted you will be required to enter the information in the table below.
 Please enter the GBC Course Code (if applicable) where AS is being granted.

Previous Institution	Subject	Course	Grade	Enter GBC Course Code that AS is being applied to

CAPP Program Core Subjects

Catalog Term	Semester	Subject	Course	Equivalent Exists? Yes/No	Grant AS Y/N
					Y/N <input type="checkbox"/>
					Y/N <input type="checkbox"/>
					Y/N <input type="checkbox"/>

Academic Divisional Office Use Only (Program Owner)

View Articulation Agreement(s) (select from drop down)

Issue Offer Yes/No

Apply AS grades to following programs Select from drop down

Agreement Number Referenced: Select from drop down

View Non XML Transcript from BDM (If applicable)

Potential Transfer Credits: (Applies only if Articulation has run and potential transfer credit has been determined)

Incoming Institution					George Brown College Equivalent		
Year	Term	Subject	Course	Mark	Subject	Course	Title

Compose Email Message to Admissions Officer

Forward to English Department Compose Email Message

Forward to General Education Department Compose Email Message

CAPP English Courses Requirements

Catalog Term	Semester	Subject	Course	Equivalent Exists? Yes/No	Grant AS
					Y/N <input type="checkbox"/>
					Y/N <input type="checkbox"/>

CAPP General Education Courses Requirements

Catalog Term	Semester	Subject	Course	Equivalent Exists? Yes/No	Grant AS
					Y/N <input type="checkbox"/>
					Y/N <input type="checkbox"/>

Compose Email Message to Student



Summary Questions & Answers

Summary

- This project went **beyond automating** the transfer credit processes
- Essentially, we transformed the processes and **improved efficiencies in multiple areas** of the College
- **Reduced paper usage** by no longer printing the XML transcripts
- **Dramatically improved services** to students and evaluators
- **Integrated & Synchronized** with ONCAT
- **Achieved transparency and accountability** in the transfer credit application, evaluation and approval process



Questions?

Business Process Integration, Training & Special Projects



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