

# CMS Campus Solutions (Student Administration) Degree Checkout Process



November 16, 2007

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# Agenda

- **Rationale for change**
- **Process overview**
- **Advantages**
- **Impact on academic departments**
- **Considerations in preparation for the process change**
- **Future changes planned**
- **Question and Answer**



# Rationale for Changing the Degree Checkout Process

- Why do we need to change our current Degree Checkout Process?
  - Record high graduating classes
  - Staffing levels in graduation unit constant
  - Challenge to meet campus processing expectations
  - Chancellor's Office graduation initiative puts focus on graduation facilitation



## Rationale for Changing the Degree Checkout Process (continued)

- Why do we need to change the Degree Checkout Process now?
  - TDA portal access “user friendly”
  - Apply for graduation on-line through Self Service
  - Staffing levels in the TDA unit have been increased
  - Review of degree requirements during conversion
  - Leverage technology to automate
  - Self service components empower students to monitor their own progress towards degree objectives



## Rationale for Changing the Degree Checkout Process (continued)

- Pilot of automated Degree Checkout Process
  - Communications pilot for Spring 2006/Summer 2006 grad applicants
  - Expanded College of Business and Economics pilot for Spring 2007/Summer 2007 grad applicants
- When does the automated Degree Checkout Process go into effect?
  - Spring 2009 candidates – begin processing during fall 2008



# Degree Checkout Process Overview

- Automatically reviewed based on the following selection criteria
  - Undergraduate students only are included in this Degree Checkout Process
  - 85 or more cumulative earned units
  - Declared major
  - Cumulative grade point average is 1.95 or higher
  - Expected graduation term is blank
- GE review is automatic by DARwin



## Degree Checkout Process Overview (continued)

- Selected students prompted to apply for graduation via an e-mail
- “Checklist” items will be added to the student’s Self Service page
  - Apply for graduation
  - Pay the graduation fee
- Application requires the anticipated term of graduation
- No graduation fee required to apply



# Degree Checkout Process Overview (continued)

- After student applies for graduation, major/minor checklists added to student record – viewable by Academic Department only
- Academic Departments receive list of students from their department who require review
- Academic Department reviewer goes to the portal and runs a TDA for the student
- Once reviewed, the TDA is signed off in PeopleSoft on the student's departmental major/minor checklist as approved
- If exceptions are required, the student's departmental checklist will be noted as "Exceptions Required"
  - Exceptions sent to the TDA unit for encoding
  - TDA unit will set the student's checklist item to approved once exception encoded





## Degree Checkout Process Overview (continued)

- Once the major/minor checklist is approved, the student will be set to Candidate status if the graduation fee is paid
- Students sent an e-mail reminder that the graduation fee is not paid if necessary
- To become a Candidate for a given term, the graduation fee must be paid
- Student must become a candidate for graduation no later than mini-census of the term of anticipated graduation
- Degree Checkout Process information and deadlines added to A&R website



## Advantages to the Automated Degree Checkout Process

- Students are automatically put into the “pipeline” for the graduation process
- TDA report becomes the official Graduation Checkout Document
- The graduation fee is not required to begin the process
- Use of TDA and student automatically put into graduation process should reduce “surprises”



# Changes Affecting Academic Departments

- Official graduation checkout document will be the TDA
- No need to complete NCR forms and file copies of the Grad Checkout
- TDA document is dynamically updated with registration and grading information and available via the portal
- GE Grad Checkout is automated which eliminates delay for manual GE review by the Graduation Unit
- Department approved exceptions to the major or minor will be reflected on the TDA



## Changes Affecting Academic Departments (continued)

- TDA exceptions can be electronically submitted to the TDA unit
- TDA is available for any student throughout his/her undergraduate career for review of degree requirements
- Sign off of major or minor checklists are completed on-line
- Candidacy lists should be available no later than census of the term allowing for commencement planning activities



## Things to Consider in Preparation

- Who in your department will require training on this process?
- What types of things will they need training on?
- Who in your department will require authority to sign off on major and minor checklists?



## Things to Consider in Preparation (continued)

- Who has the authority to approve and/or submit exceptions to the TDA?
- What can be done in advance to prepare for this change?
- How might this affect your current Degree Checkout Process procedures within your department?



# The Future

- Degree Checkout Process reviewed and adjusted based on feedback
- Proposed early candidacy term audit by Grad Unit
  - letter of notification if deficiencies
  - need to complete outstanding items (e.g. incompletes, supplemental transcripts, petitions for exceptions, EWP, etc.)
- Reduced manual review improves availability of evaluators to students for graduation related questions



# Student Self-Service Student Center Screen

## Tuffy's Student Center

**Academics**

**Enrollment**  
[My Class Schedule](#)  
[Wish List](#)  
[Add a Class](#)  
[Drop a Class](#)

**Academic History**  
[Grades](#)  
[Degree Progress](#)

other academic... >>

Deadlines URL

Summer 2008 Schedule		
	Class	Schedule
	HIST 597-01 SUP (1017)	TBA
	MATH 105-01 LEC (1002)	MWF 9:00AM - 9:50AM MH 264 - Lecture Room

weekly schedule ▶

**Finances**

**My Account**  
[Account Inquiry](#)  
[Payment Profile](#)  
[1098T Detail Inquiry](#)  
[1098T Print Option Inquiry](#)

**Financial Aid**  
[View Financial Aid](#)  
[Accept/Decline Awards](#)

other financial... >>

**Personal Information**

[Demographic Data](#)  
[Emergency Contact](#)  
[Names](#)  
[User Preferences](#)

other personal... >>

**Contact Information**

<b>Home Address</b> 1117 Greenleaf Ave Sacramento, CA 95116 Sacramento	<b>Mailing Address</b> 410 Maple St Anaheim, CA 92806 Orange
<b>Home Phone</b> 714/773-1234	<b>Student Email Address</b> ellie57@csu.fullerton.edu

**SEARCH FOR CLASSES**

**Holds**  
No Holds.

**To Do List**

- 7th Sem High School Trans
- Bank Statement
- Financial Statement
- I-94
- Official TOEFL Scores
- SAT or ACT Scores
- File Degree Application**
- Pay Commencement Fee**

details ▶

**Enrollment Dates**  
[Open Enrollment Dates](#)





# Student Center To Do List Items

Tuffy's SR Degree Checkout

## To Do List

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Below is a list of your current To Do items. To sort or filter your list of To Do items, change the options below and click Search.

View your To Do Items by

Due Date

go

Item List
To Do Item
<a href="#">Pay Commencement Fee</a>
<a href="#">Submit Degree Application</a>

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# Student Specific To Do List Detail

[To Do List](#)

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[To Do Item Detail](#)

[Tuffy's SRDegree Checkout](#)

**Submit Degree Application**

**Contact**

**Contact:**

**Description**

Our records indicate that you have more than 85 total units and may be eligible to begin the degree checkout process. Please go online and submit your degree application.

**Return**



# Submitting an Online Degree Application

Tuffy's Student Center

## Academics

### Enrollment

- [My Class Schedule](#)
- [Wish List](#)
- [Add a Class](#)
- [Drop a Class](#)

### Academic History

- [Grades](#)
- [Degree Progress](#)

Deadlines URL

This Week's Schedule	
Class	Schedule
ACCT 505-01 SEM (10098)	Th 7:00PM - 9:45PM LH 401 - Lecture Room

[weekly schedule ▶](#)

- other academic... >>
- Apply for Graduation
  - Edit a Class
  - Enrollment Verification
  - Exam Schedule
  - Learning Management
  - Model Transfer Credit
  - Swap Classes
  - Transfer Credit Report
  - Unofficial Transcript [Print](#)
  - other academic... >>

You have no outstanding charges.

[make a payment ▶](#)

### Financial Aid

- [View Financial Aid](#)
- [Accept/Decline Awards](#)

other financial... >>



# Applying for Graduation Program Plan

Tuffy's SRDegree Checkout

go to ...

## Apply for Graduation

Select the academic program in which you wish to apply for graduation by clicking on its description.

### Select an Academic Program

Academic Program Undergraduate Degree Career Undergraduate

<b>Degree</b>	Bachelor of Arts
<b>Major</b>	Art/History 1MJ 1BA



go to ...



# Selecting Expected Graduation Term

Tuffy's SRDegree Checkout

## Apply for Graduation

The academic program listed below 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.

<b>Program</b>	Undergraduate Degree	<b>Career</b>	Undergraduate
<b>Degree</b>	Bachelor of Arts		
<b>Major</b>	Art/History	1MJ 1BA	

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

**Expected Graduation Term**

  
Fall 2007  
Spring 2008  
Summer 2008

SELECT DIFFERENT PROGRAM

CONTINUE



# Verify and Submit Graduation Application

Tuffy's SRDegree Checkout  
Apply for Graduation

go to ... >>

Verify that all data is correct.

If the academic program/degree is not correct, click the Select Different Program button to select a different value.  
If the term is not correct, click the Select Different Term button to select a different value.

If everything is correct, click the Submit Application button to continue the process.

<b>Program</b>	Undergraduate Degree	<b>Career</b>	Undergraduate
<b>Degree</b>	Bachelor of Arts		
<b>Major</b>	Art/History	1MJ 1BA	
<b>Expected Graduation Term</b>		Summer 2008	
<b>Graduation Instructions</b>			
<b>Submit your degree application</b>			

SELECT DIFFERENT PROGRAM

SUBMIT APPLICATION

SELECT DIFFERENT TERM



# Graduation Application Confirmation

Tuffy's SRDegree Checkout

go to ...  

Apply for Graduation

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 Submit Confirmation

**You have successfully applied for graduation.**

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go to ...  

# Graduation Checkout for Departments

**Menu**

- Global Payroll & Absence Mgmt
- Payroll Interface
- Workforce Development
- Organizational Development
- Enterprise Learning
- Workforce Monitoring
- Pension
- Campus Community
  - Personal Information
  - Personal Information (Student)
  - SEVIS
  - Checklists
    - Person Checklists
      - Checklist Management - Person
      - Item Update - by Person
      - Item Update - by Item
      - Person Checklist Summary
      - Person Checklist Detail
      - Person Tracking Summary
      - Person Tracking Inquiry
- Organization Checklists
- Event Checklists
- Mass Change - Checklists
- Process Checklists
- Set up Checklists

### Checklist Management - Person

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) | [Add a New Value](#)

<b>ID:</b>	begins with	<input type="text" value="899887857"/>	<input type="button" value="🔍"/>
<b>Sequence Number:</b>	=	<input type="text"/>	<input type="button" value="🔍"/>
<b>Administrative Function:</b>	begins with	<input type="text"/>	<input type="button" value="🔍"/>
<b>Checklist Code:</b>	begins with	<input type="text"/>	
<b>National ID:</b>	begins with	<input type="text"/>	
<b>Campus ID:</b>	begins with	<input type="text"/>	
<b>Last Name:</b>	begins with	<input type="text"/>	
<b>First Name:</b>	begins with	<input type="text"/>	

Case Sensitive

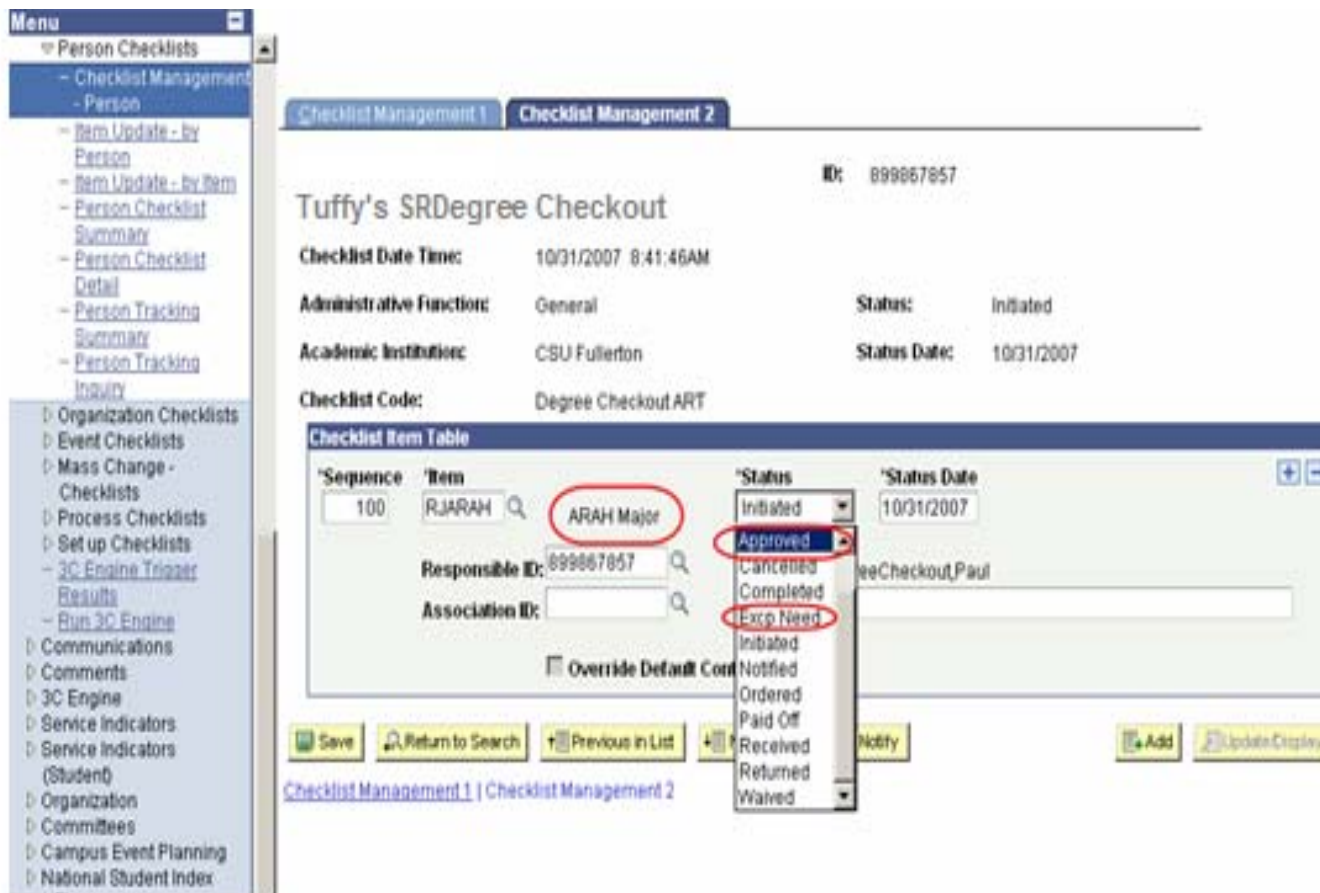
[Basic Search](#)
 [Save Search Criteria](#)

[Find an Existing Value](#) | [Add a New Value](#)

Enter the student's CWID to locate checklist.



# Departmental Signoff of TDA for Major or Minor



Menu

- Person Checklists
  - Checklist Management - Person
  - Item Update - by Person
  - Item Update - by Item
  - Person Checklist Summary
  - Person Checklist Detail
  - Person Tracking Summary
  - Person Tracking Inquiry
- Organization Checklists
- Event Checklists
- Mass Change - Checklists
- Process Checklists
- Set up Checklists
  - 3C Engine Trigger Results
  - Run 3C Engine
- Communications
- Comments
- 3C Engine
- Service Indicators
- Service Indicators (Student)
- Organization
- Committees
- Campus Event Planning
- National Student Index

Checklist Management 1 Checklist Management 2

ID: 899867857

Tuffy's SRDegree Checkout

Checklist Date Time: 10/31/2007 8:41:46AM

Administrative Function: General Status: Initiated

Academic Institution: CSU Fullerton Status Date: 10/31/2007

Checklist Code: Degree Checkout ART

Sequence	Item	Status	Status Date
100	RJARAH ARAH Major	Initiated	10/31/2007

Responsible ID: 899867857

Association ID:

Override Default Control

Save Return to Search Previous in List Next in List Add Update Display

Checklist Management 1 | Checklist Management 2



# Question and Answer

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